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Daniel Doz, Darjo Felda, Mara Cotič, Tina Štemberger

## Students' Perceptions of Remote Teaching and Learning: The Slovene Minority in Italy during the Pandemic Period of Covid-19

During the second quarantine period in Italy (Oct. '20–June '21), students once again faced a remote teaching and learning format. Much research has been conducted on students' perceptions during the first pandemic period; however, far less is known about the second period, especially in the case of students within the Slovene minority in Italy. We aimed to investigate (1) students' satisfaction with their teachers' teaching methods in remote learning and in-class teaching formats, (2) students' perceptions regarding the main differences between in-class and online mathematics lessons, and (3) whether students' grades in mathematics changed as a result of the pandemic. The findings showed that students' grades during the quarantine period increased compared to their grades before the pandemic. However, students were more satisfied with their teachers' in-class teaching methods and believed that in-class teaching was more efficient. They were also more motivated and concentrated at school than online.

**Keywords:** remote learning, online lessons, quarantine, Covid-19, Slovene minority, Italy.

### Mnenje dijakov o poučevanju in učenju na daljavo: Slovenska manjšina v Italiji v času pandemije covida-19

*V 2. obdobju karantene v Italiji (okt. '22–jun. '21) so se dijaki višjih srednjih šol ponovno soočili s poukom na daljavo. Medtem ko je veliko raziskav obravnavalo mnenja dijakov v prvem obdobju pandemije, je bilo v drugem obdobju podobnih raziskav veliko manj, zlasti v primeru dijakov slovenske manjšine v Italiji. Želeli smo raziskati (1) zadovoljstvo dijakov z učnimi metodami njihovih učiteljev pri poučevanju na daljavo in v razredu, (2) mnenje dijakov o glavnih razlikah med poukom matematike v razredu in na spletu in (3) ali so se ocene matematičnega znanja zaradi pandemije bistveno spremenile. Rezultati so pokazali, da so se ocene dijakov v obdobju karantene zvišale v primerjavi z njihovimi dosežki pred pandemijo. Dijaki so bili bolj zadovoljni z metodami poučevanja svojih učiteljev v razredu in so mnenja, da je poučevanje v razredu učinkovitejše. V šoli so bili tudi bolj motivirani in osredotočeni kot na spletu.*

**Ključne besede:** učenje na daljavo, spletni pouk, karantena, covid-19, slovenska manjšina, Italija.

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# 1. Introduction

Italian high school students experienced two quarantines because of the national sanitary emergency connected to the spread of Covid-19. The first began at the end of February 2020 (DPCM 1, 2020; Decreto-legge 25 marzo 2020) and lasted until the end of the school year (i.e., June 2020). During this time, when emergency plans were adopted by the government, elementary, middle and high schools, as well as universities, had to close. Students and teachers had to adapt to remote lessons (Quattrone et al. 2020), which are characterised by temporal and/or spatial separation that is normally compensated for with media and technology (Hodges et al. 2020; Zorčič 2020). Italian teachers used various learning and teaching methods, including not only online lectures, audio-visual material, and conferences, but also books and notes (Tejedor et al. 2020). The Decrees of the Prime Minister (DPCM 1, 2020; Decreto-legge 25 marzo 2020) stated that teachers had to adapt their teaching and assessment methods to remote teaching.

The second lockdown, this time only for high schools, occurred at the end of October 2020 (DPCM 2, 2020) and lasted for two months. The national decree stated that high schools had to adopt remote teaching once again to guarantee students a natural continuation of their educational activities and learning processes. The Ordinance from the Ministry of Health of 24 December 2020 stated that high schools might open at the end of the winter vacation (Ministero della salute 2020). The second quarantine was, nevertheless, much different from the first (Bogatec et al. 2021), as schools were open for a longer period throughout the school year, and teachers were more prepared than during the first quarantine period. Hence, teachers had time to prepare and adjust their teaching methods for the second lockdown.

Similarly to what has been reported in the international literature, remote learning in Italy meant a great change in the way lessons were organised (Basilaiia & Kvavadze 2020; Upoalkpajor & Upoalkpajor 2020; Kim 2020). Regarding remote learning worldwide, several issues have been reported, particularly relating to internet connections and technological equipment (Adnan & Anwar 2020), the difficulty of doing assignments during online lectures (Nasution & Ahmad 2020), lower satisfaction with online learning (Gonçalves et al. 2020), and a higher level of anxiety among students (Arđan et al. 2020; Husky et al. 2020; Cao et al. 2020).

Some studies proved that minority students faced additional issues during the pandemic remote-learning period (Eurac Research 2020). For instance, students from the Slovene minority in Italy faced fundamental issues related to the unavailability of digital learning materials in the Slovene language on topics covered in the Italian national curriculum (Bogatec et al. 2021). Additionally, students from non-Slovene speaking families, who encountered the Slovene

language exclusively at school, were deprived of the essential extra help that they would have received at school (Bogatec et al. 2021). Overall, the problem of what minority students thought of the second remote-learning period in Italy remains an open question in the literature.

The Covid-19 pandemic also had an important impact on the teaching of mathematics. Maths teachers had to adapt their mathematical communication (i.e., the ways of explaining mathematics to students) to the online environment (Wahyuningrum & Latifah 2020). Math teachers believed that students found it more difficult to understand mathematics delivered through online platforms (Yohannes et al. 2021), and neither students nor teachers had adequate digital skills (Mailizar et al. 2020). Thus, further investigation into students' opinions on mathematics lessons during the remote-learning period is needed.

Considering the teaching and learning of mathematics, Slovene minority students in Italy faced an additional issue. The unavailability of much of the learning material on topics in the Italian national curriculum in the Slovene language (Grgič 2017; 2019), especially in the case of digital materials (Bogatec et al. 2021), represented an issue for students and math teachers. Thus, some students might have experienced additional stress from trying to find explanations of the topics, and the teachers might not have had access to the proper material. Hence, minority students, in comparison to the majority of students, faced additional challenges, so it is reasonable to expect that their perceptions of remote teaching and learning also differed in some aspects.

The aim of the present research was to understand (1) Slovene minority high school students' satisfaction with their mathematics teachers' remote and in-class teaching methods, (2) students' perceived differences between remote and in-class (traditional) maths teaching and learning, and (3) whether students' grades increased during the pandemic period. Since research on the topic of the second remote learning period during the Covid-19 outbreak in Italy is still scarce, we decided to focus on this period, in particular: October–December 2020. Specifically, we examined students' satisfaction with teachers' teaching methods both in class and during the second quarantine. In addition, we present suggestions for educators and policymakers.

## 2. Theoretical Framework

### 2.1 Education during the Covid-19 Pandemic

During the Covid-19 pandemic, the learning process changed from in-class to online instruction, which had various impacts on the quality of teaching and learning (Sahu 2020; Dietrich et al. 2020; Aristovnik et al. 2020; Chakraborty et al. 2020). Several online learning tools were used, including communication platforms, such as Zoom and Google Hangouts, and communication facilitators,

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such as video chat, conference calls, chatrooms, conferences, emails and communication forums (Gonçalves et al. 2020; Ferraro et al. 2020; Nenko et al. 2020). Remote learning meant a change in the pedagogical techniques used. Students had clarification sessions, video lessons, materials in text format, group work, individual work, group discussions and other forms of learning (Gonçalves et al. 2020). In addition, various evaluation models were used, such as face-to-face assessing, online individual work, online group work and online tests.

The research has highlighted several obstacles and advantages regarding online learning. For instance, students argued that there was a lack of concentration (Gonçalves et al. 2020; Fatonia et al. 2020; Son et al. 2020), a lack of student interaction (Gonçalves et al. 2020; Lassoued et al. 2020; Coman et al. 2020), difficulty in time management (Gonçalves et al. 2020), and a lack of motivation and effort (Gonçalves et al. 2020; Lassoued et al. 2020; Zaccoletti et al. 2020; Aguilera-Hermida 2020). On the other hand, students reported greater time and location flexibility (Gonçalves et al. 2020) and better academic results (Gonçalves et al. 2020; Gonzalez et al. 2020). The latter result could be seen as a positive outcome (i.e., remote learning helps students perform better); on the other hand, students may have cheated during exams and assignments (Bilen & Matros 2020; Nguyen et al. 2020).

Some studies showed that students' overall perceptions of online learning were not good (Gonçalves et al. 2020; Lassoued et al. 2020; Coman et al. 2020). Students felt that online learning hindered the learning process because of various issues with internet access, difficulties in communicating with their teachers, problems carrying out assignments and fewer students participating during online lessons (Nasution & Ahmad 2020; Baloran 2020; Coman et al. 2020; Surani & Hamidah 2020; Giatman et al. 2020). Some students felt that their learning worsened during remote learning (Chen et al. 2020).

The same studies found that students perceived that their institutions were not prepared to organise online lessons or that they did not adapt their teaching methods quickly enough. Some teachers were not able to adapt their teaching styles to the online environment or to maintain their students' attention.

Some researchers showed that students preferred the in-class lesson format and learned better while in class; however, students felt comfortable with online classes (Surani & Hamidah 2020; Gonçalves et al. 2020; Giatman et al. 2020).

Regarding mathematics education, remote learning, resulting from the Covid-19 pandemic, changed the teaching and learning processes of this subject (Mulenga & Marbán 2020). The transition to remote learning greatly impacted students' understanding of specific mathematical concepts, as some teachers adopted asynchronous teaching methods and did not provide additional explanations of the material covered (Mukuka et al. 2021; Murtafiah et al. 2020). Mathematics teachers also faced fundamental issues (Barlovits et al. 2021; Chirinda et al. 2021) related to the use of math-specific technology, such as virtual white-



boards, video recordings and video-editing software, as well as several learning platforms. In particular, the inability to use a blackboard was a major issue when teaching mathematics remotely, as this is an almost indispensable tool in teaching and learning mathematics (Busto et al. 2021). In addition, mathematics lessons specifically require derivation, numerous consolidations, and learning in interaction, and it is very important that teachers react to students' possible gaps in knowledge as promptly as possible, as it is crucial that students master the simpler concepts before moving on to more complex concepts (Bone et al. 2021). This was very difficult to deliver during remote learning.

The impact of remote teaching and learning on mathematical knowledge specifically can also be observed in students' achievements in the Italian national assessment of mathematical knowledge, organised by the National Institute for the Evaluation of the Education and Training System (INVALSI – Istituto nazionale per la valutazione del sistema educativo di istruzione e formazione). It was found that students' overall achievements in mathematics in 2021 were 10 points lower than in 2019 (INVALSI 2021). The INVALSI study for Grade 13 (i.e., the last year of schooling; INVALSI 2021) pointed out that 51 % of Italian students did not gain adequate results in the 2021 national assessment of mathematical knowledge, which corresponded to a 9 % increase in under-achieving students in 2019. To our knowledge, no research has investigated the possible reasons underlying this decrease in achievement on the national mathematics test, including the quality of teaching and learning during the Covid-19 pandemic. Therefore, it is important to address the quality of mathematics learning and teaching during the Covid-19 pandemic to have a clear image regarding students' mathematical knowledge and to outline possible measures to overcome their lack of knowledge.

## 2.2 The Slovene Minority in Italy and the Covid-19 Pandemic

The Covid-19 pandemic posed certain issues for students, who faced a change in the way lessons were delivered. Minority students, however, were more affected by the pandemic in terms of both social and economic aspects, including education (Eurac Research 2020). The Italian minority in Slovenia (Sorgo & Lukanovič 2020) and the Slovene minorities in Croatia (Riman 2020) and Austria (Zorčič 2020) faced similar problems. In the present research, our focus is on the Slovene minority in Italy.

The Slovene minority in the Friuli-Venezia Giulia region of Italy is a national minority, whose members live along the Slovene-Italian border. This is a well-integrated community, both socially and economically (Brezigar 2020). Italy recognises the rights of the Slovene minority in the Trieste, Gorizia and Udine provinces, which are guaranteed by the 2<sup>nd</sup>, 3<sup>rd</sup> and 6<sup>th</sup> articles of the Italian Constitution (Senato della Repubblica 2022) and the 3<sup>rd</sup> article of Constitutional

Law 38 from 1963 (Norme a tutela della minoranza linguistica slovena della regione Friuli - Venezia Giulia 2001). Students who are part of the Slovene minority have the right to attend schools with Slovene as the language of instruction or bilingual schools (Disciplina delle istituzioni scolastiche nella provincia di Gorizia e nel Territorio di Trieste 1963), which are equivalent to schools in the Italian language. Kindergartens, primary schools, lower and upper secondary schools with Slovene as the language of instruction, and the bilingual (Italian–Slovene) school in Špeter are an integral part of the Italian national school system, and they function in the same way as Italian schools (Bogatec 2015). There are some slight differences in the programs taught, as students from schools using the Slovene language have additional topics in history and geography (Bogatec 2015), such as the history of Slovenes in Italy (USR-FVG 2021).

Schools with Slovene as the language of instruction or bilingual instruction have certain specificities and face additional issues (Baloh 2012; Brezigar & Zver 2019; Strani 2011). For example, students in these schools need textbooks in the Slovene language that cover the topics from the Italian curriculum (Bogatec 2015). Hence, students need specific didactic materials for learning the Slovene language (Grgič 2017; 2019). Moreover, students from these schools have varied knowledge of the Slovene language, and teachers need to adapt their teaching strategies to the students' language skills (Brezigar & Zver 2019; Baloh 2004). Some students only use the Slovene language at school (Bogatec 2015), while they speak Italian or another language at home.

The specificities of schools with Slovene as the teaching language concern not only the linguistic competencies of the students and their parents, the unique programs and the learning materials (Brezigar & Zver 2019; Brezigar 2020; Grgič 2017; Melinc Mlekuž 2019), but also the availability of digital learning materials (Grgič 2019). In particular, the material on several digital platforms does not fulfil the language or content requirements. For instance, online materials in the Italian language contain topics from the Italian national programs; however, they do not fit the language requirements. On the other hand, materials (e.g., textbooks) from Slovene institutions fit the language requirement but do not fit the requirements of the topics taught. Taking an example from mathematics, the Italian national syllabus for lyceums (Ministero dell'istruzione, dell'università e della ricerca 2010) requires mathematics teachers to present the topic of differential equations in the final year of scientific lyceums; however, this topic is not present in the Slovene national syllabus (Ministrstvo za šolstvo in šport RS 2008). Consequently, this means that the topic of differential equations is not present in high school mathematics textbooks in the Slovene language. Teachers who cover this topic need to rely on self-made materials (Figure 1) or other materials in the Slovene language (e.g., university course notes), which may not be suitable for the specific level of schooling.

Figure 1: A Slovene minority high school teacher's remote class on the usage of differential equations to solve the radioactive decay problem in physics

Handwritten mathematical derivation of radioactive decay equations in Slovene:

$$N(t) = \text{masa radioaktivnega izotopa } {}^{14}\text{C} \text{ v času } t.$$

$$N'(t) = -k \cdot N(t) \quad \text{hitrost je negativna} \\ \Rightarrow \text{velikost manj izotopov}$$

$$\frac{N'(t)}{N(t)} = -k \quad \int$$

$$\int \frac{N'(t)}{N(t)} dt = \int -k dt$$

$$\ln(N(t)) = -kt + C \quad / e^{(\cdot)}$$

$$N(t) = e^{-kt+C} = e^{-kt} \cdot e^C$$

Source: Empirical data.

Another fundamental issue was the problem of communicating with students and families who have low or no knowledge of the Slovene language (Brezigar 2020). The abovementioned problems represented an even greater obstacle during remote learning. Teachers faced a number of issues with delivering the materials and providing extra help to students who struggle with the Slovene language. Contact with Slovene was provided almost exclusively through video lessons, registered video materials and various forms of digital written materials. The role of parents who do not speak Slovene also changed, as they were unable to help their children (Bogatec et al. 2021).

Social distancing during the pandemic period also meant the inability to interact with peers from the Slovene community, including in cultural and sports events, as well as in other activities that are believed to be crucial in maintaining a community. These activities, as well as education in the Slovene language, are a milestone for the Slovene minority in Italy. The linguistic skills of students who were not involved in social, cultural and sports events were weakened, thus making the minority even more vulnerable to the process of linguistic assimilation (Bogatec et al. 2021).

### 3. The Research Problem and Study Objectives

Based on international research results that showed various impacts of Covid-related remote teaching and learning, and considering the special situation of Slovene minority students in Italy, as well as with regard to the peculiarities of maths teaching and learning, we outlined three main research questions:

RQ1: How did students perceive their own satisfaction with the teaching methods in mathematics during remote teaching?

RQ2: How did students perceive the differences between remote and in-class mathematics learning?

RQ3: How did students' grades in mathematics change during the pandemic?

For each research question we controlled for the role of gender.

### 4. Methodology

#### 4.1 Methods

We used a nonexperimental method of causal analysis. We carried out quantitative research, using an online questionnaire to gather results that were analysed using descriptive and inferential statistical methods.

#### 4.2 Sample

The participants in the present study were 129 high school students, of whom 58 were males (45.0 %) and 71 (55.0 %) were females. There were 85 (65.9 %) students from lyceums, while the remaining 44 (34.1 %) were students from technical schools. In addition, 76 (58.9 %) students attended a high school in Trieste, while 53 (41.9 %) students attended a high school in Gorizia. The average age of the participants was  $M = 16.0$  ( $SD = 1.60$ ;  $min = 13$ ;  $max = 19$ ). There were 44 (34.1 %) first-year students, 23 (17.8 %) second-year students, 36 (27.9 %) third-year students, 15 (11.6 %) fourth-year students, and 11 (8.5 %) fifth-year students.

According to Bogatec (2021), in the 2019/20 school year (data for the 2020/21 school year are presently unavailable), there were 936 students attending Italian high schools with Slovene as the language of instruction, which signifies that the research sample represents 13.8 % of the whole sample from the 2019/20 school year. Moreover, 609 (65.1 %) students attended a high school in Trieste, while 327 (34.9 %) attended a high school in Gorizia. Comparing these percentages with those from our sample, we claim that there is not enough evidence to state that our sample significantly differs from the population ( $\chi^2(1) = .922$ ;  $p = .337$ ), so we considered the sample to be representative of the population (cf. Sagadin 1993).

### 4.3 Data Collection

Data were collected in June and July 2021 through an online questionnaire. This technique was used instead of a printed questionnaire, as high schools had been closed to students from October 2020, and all lessons were online (DPCM 2, 2020). However, this represented a major problem, as there was a low response rate (66.1 %).

### 4.4 Instrument

The online questionnaire used was composed of nine questions, among which four were demographic questions, two questions analysed the students' mathematics grades at the end of the first and second semesters of 2020/21, two questions analysed the students' appreciation of the in-class and online teaching methods used by their mathematics teachers, and a question composed of 15 items evaluated students' perceptions of whether they preferred in-class or remote mathematics lessons (see Appendix A).

The students' appreciation of their maths teachers' teaching methods was measured using a 5-point Likert scale (1 = not satisfied at all, 5 = very satisfied). In the 15-item question, students indicated their agreement with 15 statements with a 5-point Likert scale (1 = absolutely no agreement, 5 = absolute agreement).

### 4.5 Data Analysis

The collected data were analysed using the Jamovi statistical software.

Principal component analysis (PCA) was conducted to determine the validity of the instrument. Concerning the 15-item questionnaire on the quality of remote learning compared to in-class mathematics lessons, the factorability of the 15 questions was examined. The Kaiser-Meyer-Olkin measure of sampling adequacy was greater or equal to .842, above the commonly recommended value of .600. Bartlett's test of sphericity was significant ( $\chi^2(105) = 1102, p < .001$ ). Given these two indicators, factor analysis was deemed to be suitable for all 15 items.

Initial eigenvalues indicated that the first three factors explained 36.1 %, 17.8 % and 13.3 % of the variance, respectively, for a total of 67.2 % of the variance. Solutions for three factors were examined using the varimax rotation of the factor loading matrix (see Table 1). The first factor grouped the questions regarding teaching methods. The second factor was connected to the students' emotions, such as stress. The third factor was connected to the environment, such as the presence of distractors.

Table 1: Factor loading of the questionnaire

	Component			Uniqueness
	1	2	3	
Item 1	0.616		0.320	0.487
Item 2	0.823			0.251
Item 3	0.707	0.376		0.359
Item 4	0.764			0.304
Item 5	0.822			0.284
Item 6	0.741		0.342	0.311
Item 7	0.617		0.479	0.340
Item 8		0.777		0.265
Item 9		-0.840		0.259
Item 10			0.772	0.293
Item 11	0.529		0.608	0.305
Item 12	0.761	0.310		0.287
Item 13	0.346	0.649	0.332	0.348
Item 14	0.562			0.532
Item 15	0.504	0.582	-0.328	0.300

Source: Empirical data.  
Note: Varimax rotation was used.

The reliability of this piece of the questionnaire was checked with Cronbach's alpha coefficient, which indicated that the questionnaire had excellent validity ( $\alpha = .90$ ). Moreover, the two-week test-retest reliability was excellent ( $r = .833$ ). The analysis of singular variables was done using descriptive statistical methods (i.e., mean and standard deviation). While it is common in psychological and pedagogical research to consider Likert-scale items as continuous variables (De Winter & Dodou 2010), we decided to use non-parametric tests instead (i.e., Spearman's correlation coefficient  $\rho$ , the Mann-Whitney  $U$  test to prove differences between two categories, the Kruskal-Wallis  $H$  test for the differences among three or more categories, and the Wilcoxon rank  $Z$  test for the comparison between two variables). Moreover, Levene's test for equality of variances and the Kolmogorov-Smirnov test for normality were violated in most cases, thus confirming the usage of non-parametric statistical tests.

## 5. Results

### 5.1 Students' Satisfaction with In-Class and Online Classes

In Table 2, we present the frequencies and percentages of the students' satisfaction with their maths teachers' in-class teaching methods.



**Table 2: Frequencies of the students' class satisfaction.**

Levels	f	% f
Not satisfied at all	6	4.7 %
Not satisfied	23	17.8 %
Neutral	25	19.4 %
Satisfied	42	32.6 %
Very satisfied	33	25.6 %

Source: Empirical data.

As can be observed, 22.5 % of students were unsatisfied or very unsatisfied with their teachers' teaching methods during in-class lessons. In contrast, 58.2 % of students were satisfied or very satisfied. These frequencies were statistically different ( $\chi^2(4) = 27.7$ ;  $p < .001$ ).

Concerning students' satisfaction with their maths teachers' teaching methods during remote learning, we present the frequencies and percentages in Table 3. We can see that 27.2 % of students were unsatisfied or completely unsatisfied with the teaching methods; however, 54.3 % of students were satisfied or very satisfied. These frequencies were statistically different ( $\chi^2(4) = 44.4$ ;  $p < .001$ ).

**Table 3: Frequencies of the students' satisfaction with remote learning and teaching.**

Levels	f	% f
Not satisfied at all	10	7.8 %
Not satisfied	25	19.4 %
Neutral	24	18.6 %
Satisfied	54	41.9 %
Very satisfied	16	12.4 %

Source: Empirical data.

No statistically significant differences between genders were revealed regarding in-class satisfaction with the teachers' methods ( $U = 1915$ ;  $p = .908$ ): boys ( $R = 63.40$ ) and girls ( $R = 62.66$ ) had similar perceptions concerning their satisfaction with their teachers' teaching methods. Moreover, boys ( $R = 61.78$ ) and girls ( $R = 64.02$ ) had similar perceptions in terms of their satisfaction with the teaching methods adopted during the second quarantine; the differences in perceptions were statistically non-significant ( $U = 1869$ ;  $p = .720$ ).

The students' satisfaction with in-class lessons and remote learning were positively and statistically significantly correlated ( $\rho = .495$ ;  $p < .001$ ). This means that the students who were more satisfied in class were also more satisfied with the teachers' online methods. There were, however, statistically significant differences in the students' satisfaction with their teachers' teaching methods before and during the pandemic ( $Z = 2.290$ ;  $p = .022$ ; Cohen's  $d = .26$ ): the students

were more satisfied with in-class ( $R = 137.31$ ) than online ( $R = 121.69$ ) lessons.

Moreover, the students' grades correlated positively and statistically significantly with their satisfaction with the teaching methods used both during quarantine ( $\rho = .196$ ;  $p = .029$ ) and in class ( $\rho = .263$ ;  $p = .003$ ). This means that students who were more satisfied with their teachers' methods had higher grades and vice versa. The correlations found were, however, small.

No statistically significant differences in satisfaction with the teachers' teaching methods were found among different classes either before quarantine ( $\chi^2(4) = 2.56$ ;  $p = .633$ ;  $\varepsilon^2 = .020$ ) or after it ( $\chi^2(4) = 8.40$ ;  $p = .078$ ;  $\varepsilon^2 = .066$ ).

### 5.2 Differences between In-Class and Remote Learning

In Table 4, we present the frequencies and percentages for the answers regarding the differences between in-class and remote learning of mathematics. For the sake of simplicity and interpretation, the means and standard deviations for each category are reported.

Table 4: Frequencies of the answers to the first part of the questionnaire.

	Completely disagree	Disagree	Neutral	Agree	Completely agree	Mean	SD
Item 1	5 (4.0 %)	10 (8.0 %)	32 (25.6 %)	28 (22.4 %)	50 (40.0 %)	3.86	1.15
Item 2	4 (3.2 %)	10 (8.0 %)	26 (20.8 %)	40 (32.0 %)	45 (36.0 %)	3.90	1.08
Item 3	8 (6.4 %)	23 (18.4 %)	31 (24.8 %)	33 (26.4 %)	30 (24.0 %)	3.43	1.22
Item 4	1 (0.8 %)	14 (11.2 %)	27 (21.6 %)	40 (32.0 %)	43 (34.4 %)	3.88	1.04
Item 5	5 (4.0 %)	9 (7.2 %)	31 (24.8 %)	42 (33.6 %)	38 (30.4 %)	3.79	1.08
Item 6	5 (4.0 %)	12 (9.6 %)	15 (12.0 %)	40 (32.0 %)	53 (42.4 %)	3.99	1.14
Item 7	8 (6.4 %)	15 (12.0 %)	31 (24.8 %)	28 (22.4 %)	43 (34.4 %)	3.66	1.24
Item 8	18 (14.4 %)	46 (36.8 %)	35 (28.0 %)	11 (8.8 %)	15 (12.0 %)	2.67	1.19
Item 9	9 (7.2 %)	23 (18.4 %)	31 (24.8 %)	43 (34.4 %)	19 (15.2 %)	3.32	1.15
Item 10	2 (1.6 %)	17 (13.6 %)	32 (25.6 %)	48 (38.4 %)	26 (20.8 %)	3.63	1.01
Item 11	3 (2.4 %)	14 (11.2 %)	23 (18.4 %)	41 (32.8 %)	44 (35.2 %)	3.87	1.09
Item 12	4 (3.2 %)	21 (16.8 %)	31 (24.8 %)	37 (29.6 %)	32 (25.6 %)	3.58	1.14
Item 13	8 (6.4 %)	39 (31.2 %)	28 (22.4 %)	28 (22.4 %)	22 (17.6 %)	3.14	1.22
Item 14	12 (9.6 %)	20 (16.0 %)	28 (22.4 %)	38 (30.4 %)	27 (21.6 %)	3.38	1.26
Item 15	11 (8.8 %)	25 (20.0 %)	25 (20.0 %)	30 (24.0 %)	34 (27.2 %)	3.41	1.31

Source: Empirical data.

Regarding the stress students felt in school, Item 8 showed that more than half of the students (51.2 %) felt more relaxed at home than at school, which was confirmed by Item 9 (49.6 %), with the correlation between these two variables



being negatively and statistically significant ( $\rho = -.623$ ;  $p < .001$ ). As seen in Table 4, 28.0 % and 24.8 % had a neutral position towards stress in Item 8 and Item 9, respectively. This means that approximately a quarter of the students found in-class and remote lessons equally stressful or did not notice any differences in levels of stress between these two lesson modalities.

More than half of the students (62.4 %) believed that maths in-class lessons were better than online lessons (Item 1), since they learned better (68.0 %, Item 2), the lessons were easier (50.0 %, Item 3), they learned more (66.4 %, Item 4), and the teachers' explanations were better (64.0 %, Item 5) and easier to follow (74.4 %, Item 5). Moreover, the students felt more motivated at school than online (56.8 %, Item 7); however, they were more stressed (51.2 % and 49.6 %, Items 8 and 9). The results showed that students participated more at school than online (59.2 %, Item 10) and were more concentrated (68.0 %, Item 11). They also felt that taking tests at school was better than taking them online (51.2 %, Item 15).

Students' perceptions that in-class lessons were better than those online were correlated with their satisfaction with their teachers' teaching methods in class ( $\rho = .318$ ;  $p < .001$ ) but not with their satisfaction with their teachers' teaching methods during remote learning ( $\rho = -.120$ ;  $p = .177$ ).

Regarding the differences between genders and singular questionnaire items, the Mann-Whitney  $U$  test was computed for every variable with no statistically significant differences found between boys and girls in their perceptions concerning the differences between online and in-class lessons.

## 5.3 The Changes in Students' Grades

At the end of January 2021, the students had an average mathematics grade of  $M = 7.73$  ( $SD = 1.49$ ; min = 3; max = 10), while their average grade at the end of the school year (i.e., in June 2021) was  $M = 8.22$  ( $SD = 1.35$ ; min = 4; max = 10). The Wilcoxon rank test indicated differences between the students' January ( $R = 39.09$ ) and June ( $R = 40.88$ ) grades: the end-of-year grades were higher than those in the first semester ( $Z = -4.689$ ;  $p < .001$ ; Cohen's  $d = .471$ ).

At the end of the first semester, the boys had an average grade of  $M = 7.56$  ( $SD = 1.44$ ; min = 5, max = 10), while the girls had an average grade of  $M = 7.87$  ( $SD = 1.52$ ; min = 3; max = 10). At the end of the school year, the boys had an average of  $M = 8.02$  ( $SD = 1.38$ ; min = 6; max = 10), while the girls had an average of  $M = 8.38$  ( $SD = 1.32$ ; min = 4; max = 10). Concerning the differences between the boys ( $R = 57.94$ ) and the girls ( $R = 67.24$ ), no statistically significant differences were found at the end of the first semester ( $U = 1650$ ;  $p = .145$ ). Similarly, no statistically significant differences between the boys ( $R = 57.39$ ) and the girls ( $R = 67.71$ ) were found at the end of the second semester ( $U = 1618$ ;  $p = .105$ ). Hence, the boys and the girls had almost the same grades in mathematics at the end of both semesters.

The students' maths grades at the end of the first semester and those at the end of the school year were positively and statistically significantly correlated ( $\rho = .772$ ;  $p < .001$ ). That is, higher school grades at the end of the first semester also indicated higher grades at the end of the second semester.

## 6. Discussion

The Covid-19 pandemic has had a strong impact on education (Sahu 2020; Dietrich et al. 2020; Aristovnik et al. 2020; Chakraborty et al. 2020), especially among minority students (Eurac Research 2020; Riman 2020; Zorčič 2020; Sorgo & Lukanović 2020). Studies concerning the Slovene minority in Italy (Brezigar 2020; Bogatec et al. 2021) have highlighted fundamental issues, such as communication problems related to the delivery of the class materials in the Slovene language (cf. Bogatec 2015; Grgič 2017; 2019). Concerning mathematics specifically, this subject represents an additional issue for Slovene students in Italy. In particular, since the Italian mathematics program differs from the Slovene one, the availability of materials in the Slovene language that cover topics included in the Italian program are scarce or non-existent, so teachers need to prepare their own materials or translate materials that are available in the Italian language. The unavailability of digital materials (cf. Grgič 2019), which also affects mathematics, could be an additional issue for minority students. Therefore, exploring students' perceived differences between in-class and remote learning is important to gain a clearer picture of the quality of students' learning in this subject.

Considering these issues, the first aim of our research was to investigate students' satisfaction with the maths teachers' teaching methods both before and during the pandemic. Our study confirmed the findings of previous research (Gonçalves et al. 2020; Lassoued et al. 2020; Coman et al. 2020), showing that students were more satisfied with their teachers' teaching methods in class than online, since during the remote learning period, the students' satisfaction decreased.

In terms of the teaching and learning of mathematics specifically, previous studies have shown that students learn mathematics more effectively in class than during remote learning (cf. Chen et al. 2020; Yohannes et al. 2021). The students felt that their teachers' explanations in class were better than those given during the remote learning period, and it was easier to follow traditional lessons than online lessons, which might be related to the students' attention span during in-class and remote-learning teaching formats, as well as the teachers' readiness to switch from one teaching format to the other.

In addition, the present study, which focused on a specific group of Slovene minority students in Italy, showed that the students expressed lower levels of satisfaction with their teachers' methods during remote learning in comparison

to in-class learning. This might be connected to the fact that these teachers and students found themselves in the situation of not having the appropriate digital learning materials in the Slovene language for the topics studied (Grgič 2019; Bogatec et al. 2021). Also, some students could not rely on their parents' help, as many of them did not speak Slovene or understand specific Slovene mathematical expressions. Moreover, they could not take advantage of interaction with their peers from the Slovene community. As Bogatec et al. (2021) stressed, students' linguistic skills worsened during the pandemic. It is also necessary to emphasise that the results also showed that students with higher grades expressed a higher level of satisfaction with the teaching methods, compared to students with lower grades. In summary, the results supported the need to create the necessary paper and online resources for mathematics lessons, which would serve as a bridge between the Italian syllabus and Slovene learning materials, thus providing teachers and students with the possibility of gaining better learning outcomes. Special attention needs to be paid to the design of the necessary resources for improving learning outcomes, including those of lower achievers.

The second aim of the research was to establish students' perceived differences between remote and in-class mathematics learning. Previous research (cf. Gonçalves et al. 2020; Lassoued et al. 2020; Surani & Hamidah 2020; Gonzalez et al. 2020; Giatman et al. 2020) illustrated that students were more motivated for learning and more involved in class activities in class than online, but they felt more relaxed at home. The drop in students' motivation during remote learning might be the result of less interaction with peers and schoolmates, including the lack of certain lesson activities (e.g., pair work, group work and project work; cf. Cerbara et al. 2020). Considering the specific case of the Slovene minority in Italy, as emphasised by Brezigar (2020), students normally participate both in sports and cultural clubs, where they meet their schoolmates and friends, and actively use the Slovene language. However, Covid-19-related remote learning impeded the students from having quality face-to face interactions in Slovene (Brezigar 2020). During remote lessons, the students mostly had their microphones and cameras off, which made interaction even more difficult (Giatman et al. 2020; Lassoued et al. 2020). Considering the specific situation of the participants in this study, we believe the teachers should put more effort into planning and delivering online mathematics lessons that increase interactive activities (e.g., in pairs and in groups), thus providing students with the opportunity to interact in Slovene on mathematical issues in a physical or virtual environment, supported by constant teacher scaffolding.

Thirdly, we wanted to find out whether students' mathematics grades before and after the second remote learning period changed. We found statistically significant differences, demonstrating that grades in June 2021 were higher than those in January 2021. Students thus achieved higher grades at the end of the school year. However, we did not detect any gender differences in grades. More-

over, the students' grades were positively correlated, meaning that students with higher grades at the end of the first semester also achieved higher grades at the end of the school year. The results are not surprising, since earlier studies (Gonçalves et al. 2020; Gonzalez et al. 2020) also reported that students achieved higher grades after the first pandemic period in comparison to their achievements before the remote learning period. At this point, we must highlight that all these results do not correspond to students' achievements at the Italian national assessment of mathematics knowledge (INVALSI), which revealed that students' attainments in 2021 were lower than in 2019 (INVALSI 2021). This discrepancy might reflect the possibility that students may have cheated during online exams and tests (Bilen & Matros 2020; Nguyen et al. 2020), which could have contributed to their higher grades. However, it is also possible that teachers, as a result of their understanding and sensibility towards students who were not given the opportunity to learn mathematics in class, lowered their expectations, resulting in higher grades. The question is whether this evident lack of knowledge will impact students' further mathematical learning.

## 7. Limitations and Recommendations

The present study is not without limitations. Firstly, the present research is based on an online survey, with certain limitations associated with this context. Secondly, the sample might not be large enough, as the Covid-19 pandemic required researchers to contact students via e-mail, thus decreasing the possibility of generating a larger sample. Lastly, the since students were contacted via e-mail, there was no way of knowing who was answering the questionnaire.

Despite obvious limitations, our work provides some insights from the very specific context of Slovene minority students in Italy. It also considers the second pandemic period, which needs to be studied in further detail by the international scientific community.

Based on our findings, we recommend that legislators and school authorities continue researching the problem of students' perceptions of remote learning, especially among minority students, and in terms of its connection to mathematics teaching and learning. Such research has the potential for increasing the quality of remote learning. We suggest enriching our results from quantitative research with qualitative research to gain a deeper understanding of the second quarantine period. Finding more efficient teaching methods for remote classes would permit students to be both more active and more concentrated during online lessons, which would lead to greater achievements and more knowledge.

Remote learning has been an emergency attempt to continue educational activity during the pandemic period. However, based on students' perceptions, we state that students feel that remote learning is not as effective as traditional, in-class mathematics learning.

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## Appendix A

1. Gender
  - a. Male
  - b. Female
2. Age
3. Year
  - a. 1<sup>st</sup> year of high school
  - b. 2<sup>nd</sup> year of high school
  - c. 3<sup>rd</sup> year of high school
  - d. 4<sup>th</sup> year of high school
  - e. 5<sup>th</sup> year of high school
4. School
  - a. Lyceum France Prešeren (TS)
  - b. Lyceum Anton Martin Slomšek (TS)
  - c. Technical school Jožef Stefan (TS)
  - d. Technical school Žiga Zois (TS)
  - e. Lyceum Simon Gregorčič (GO)
  - f. Lyceum Primož Trubar (GO)
  - g. Technical school Žiga Zois (GO)
  - h. Technical school Jurij Vega (GO)
5. Grade in mathematics at the end of the 2020/21 school year [1–10]
6. Grade in mathematics at the end of the first semester of the 2020/21 school year [1–10]
7. How satisfied were you with your mathematics teacher's teaching method in class? [Likert scale]
8. How satisfied were you with your mathematics teacher's teaching method during the remote teaching and learning? [Likert scale]
9. Please, indicate to what extent you agree with the following statements [Likert scale]:
  - a. [Item1] Lessons in class are better than lessons online.
  - b. [Item2] I have a better grasp of the topics that we do in class.
  - c. [Item3] Lessons in class are easier than those online.
  - d. [Item4] I learn more in class.
  - e. [Item5] The explanations in class are better than those given during quarantine.

- f. [Item6] It is easier to follow the lesson in class than online.
- g. [Item7] At school I was more motivated than online.
- h. [Item8] At school I was more relaxed than online.
- i. [Item9] In class I was more stressed than online.
- j. [Item10] I participate more in class than online.
- k. [Item11] In class I am more concentrated than at home.
- l. [Item12] At school the studied topics were clearer than online.
- m. [Item13] At school I had more energy.
- n. [Item14] At school we did more of the program than at home.
- o. [Item15] Taking tests at school is better than at home.

Irina Moira Cavaion

## Slovene as a Minority and Foreign Language in Italian Mainstream Schools in the Province of Trieste

This paper describes the history, presence, actions and perspective of Slovene language teaching and learning in Italian primary mainstream schools in the province of Trieste as an extraordinary opportunity – after 30 years of Slovenia's independence and almost 25 years of open borders – to reflect on the role of Slovene as a minority and foreign language among the majority population of neighbouring Italy, on the interethnic relationships it fosters, and on its potential to become an element of identity awareness development within the process of identity formation for both the kin state Slovenia homeland and the Slovene community in Trieste.

**Keywords:** Slovene as FL/L2, neighbouring languages, border regions, language policy.

## Slovenščina kot manjšinski in tuj jezik na italijanskih šolah v tržaški pokrajini

*Članek predstavlja zgodovino, prisotnost, možnosti in prihodnost učenja in poučevanja slovenščine v italijanskih osnovnih šolah v tržaški pokrajini kot izredno priložnost za premislek – po 30 letih samostojnosti in skoraj 25 letih odprtih meja – o vlogi slovenščine kot manjšinskega in tujega jezika med večinskim prebivalstvom sosednje države Italije, medetničnih odnosih, ki se v zvezi s tem oblikujejo, in pomenu jezika za razvoj identitetne zavesti v okviru identitetne rasti tako za matično državo Slovenijo kot za slovensko skupnost v Trstu.*

**Ključne besede:** slovenščina kot tuj jezik/drugi jezik, sosedski jeziki, obmejna območja, jezikovna politika.

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## 1. Introduction. The Slovene Language in Friuli Venezia Giulia. Not Only a Matter of Ethnic Preservation

Strengthened by a decentralised view resulting from many years of border studies, we hereby propose an investigation inspired by a fluid conceptualisation of borders and the minority status of languages in these territories (Cavaion 2016; Klatt 2013), which aims to analyse the dynamics arising from the relationships that develop between coexisting ethnic communities.

We are indeed problematising the teaching of Slovene in mainstream compulsory education in neighbouring Italy where it is currently taught either as the language of a national minority – the Slovene community of the province of Trieste – or as a foreign language without locally coherent and shared language education planning.

The Slovene national minority – a rather strong and durable community in Friuli Venezia Giulia featuring important institutions such as minority schools, theatres, newspapers, economic and cultural associations, scientific research centres, etc. – has recently been widely and profoundly challenged by studies raising new questions about the real possibility of the Slovene community to successfully meet the challenges of a society that invites and induces people and institutions to meet, mix, intermix with each other and, as a consequence, blur linguistic, cultural and psychological boundaries (Bogatec & Lokar 2016; Bogatec & Vidau 2016; Brezigar 2007; Grgič et al. 2020; Jagodic & Čok 2013; Toroš 2019; Vidau 2015). Indeed, these scientific publications also address the perspective of the diffusion of the minority Slovene language among the majority population, an aspect that is quite controversial in both majority and minority communities residing in the province of Trieste, yet that we believe is a crucial element for human and cultural growth and citizenship.

The study we propose aims at contributing to and deepening the reflection on the possible key role of the teaching of Slovene in Italian majority schools as a language of a transnational territory that could act both as an instrument of social integration – or “human coexistence” as Čok (2008) has written elsewhere (cf. Čok 2003; 2006; 2009; Čok & Pertot 2010) – and as an element of identity awareness development in the process of identity formation for the kin state Slovenia and the Slovene community in Trieste.

Starting from our point of view (Cavaion 2016; 2020a; 2020b) regarding the possible role of Slovene both as a minority and neighbouring language in the border regions, we will describe the survey and the results obtained from the analyses of the current national and regional language policies that regulates the presence of Slovene in mainstream compulsory education in the province of Trieste, as well as the ongoing teaching in mainstream primary and lower secondary education<sup>1</sup> through the testimonies of project coordinators.

As we will see in the discussion and conclusions, this study could represent the baseline for broader research that could examine in more detail the impact of the teaching of Slovene within the mainstream school population – and minority community – in terms of the development of social integration, language awareness, and linguistic competence.

## 1.1 Slovene as a Language of the Environment and a Neighbouring Language

In Italy, and specifically in the province of Trieste, Slovene is the language of a national minority with all the political, societal, and identity-related implications of such circumstances (cf. Cavaion 2016, chapter What Neighbouring Languages Are (and Could Be), 16–39). A national minority is a linguistic peninsula which maintains the link with the kin state from which it has been separated and where people are “anxious to preserve what constitutes their common identity” (Klatt 2013, 301).

However, over time, the notion of national minority changes and blurs to some extent as the distance between minority and majority groups in this area narrows (Bufon 2016, 18–19; Bogatec & Lokar 2016) and identity undergoes some sort of transition. Members of the minority community find themselves in a situation of multiple identity choices (Pertot 2016, 108) – as much as, we think, members of majority groups and people of recent immigrant background – and the linkage to the kin state remains under examination (cf. Brezigar 2016; Bajc 2016; Zupančič 2016).

On the other hand, Slovene is not spoken by the majority group in the province of Trieste. It is the language of instruction in Slovene minority schools, i.e., it is not systematically part of the curricula in mainstream Italian schools where there is compulsory teaching and learning of English from the first year of primary school and compulsory teaching of a second European Community language in lower secondary school. This points to the lack of the possibility of teaching Slovene as a language of the environment or of the neighbouring country due to the absence of local, national and (cross-border) multilingual language policies, which can partly be attributed to the broader phenomenon of the absence of infrastructural and institutional cross-border links and agreements (Bufon 2016, 15). *De jure* and *de facto*, the historically multilingual social fabric of the region is not preserved, let alone promoted, by adequate language policies, i.e., inclusive language acquisition planning, which has been highlighted in Brezigar (2007):

The Slovenes in Italy being a part of the nation that mostly lives across the border in Slovenia, where Slovenian is the majority language, the linguistic minority does not have either full responsibility or “full powers” to deal with language planning. In practice this means that several institutions in the Republic of Slovenia *de facto* take

care of language planning, while there's no designed institution that takes care of the language planning that is necessary for the survival of the Slovene linguistic minority in Italy (Brezigar 2007, 211).

In 2018, the Central Office for the Slovene Language was established to manage and coordinate activities related to the use of Slovene in public administration, provide a translation and interpreting service, and take care of the standardization of Slovene legal and administrative terminology and linguistic training.<sup>2</sup> This is an important goal which guarantees Slovene-speaking citizens the right to use their language in relations with local administrative authorities. Nevertheless, in our opinion, this is not yet a complete measure taken by official bodies to promote the use of one or more languages in a given speech community, as language planning is usually defined.

Nevertheless, Slovene, especially after the Schengen Agreement, is increasingly a language that the citizens of the region nowadays want to know, learn and use in everyday life when communicating with Slovenes and visiting Slovene institutions, events and places in their region and neighbouring Slovenia (Brezigar 2013).

In Cavaion (2016), we explain the rationale and possibilities of teaching and learning neighbouring languages, proposing to consider neighbouring languages as:

languages of modern open borders, 'multiple identity' languages which by the passing of time and of historical, geopolitical events, have developed complex interconnections in terms of linguistic contacts, cultural and identity issues among people living in those areas, who are nowadays called to answer key functions in terms of social, interethnic integration (Cavaion 2016, 22–23).

Relations between the Italian and Slovene communities in the province of Trieste are not yet as constructive and dynamic as elsewhere (see the research on the Italian-Slovene border in the province of Gorizia-Gorica, Novak-Lukanovič 2011; 2015), although there has been improvement in recent years (cf. Brezigar 2016; Bajc 2016), as evidenced by a large number of Slovene language courses for adults and children organised in the last decade (Brezigar 2013) that seemed to have been stimulated more by the desire to have contacts with neighbouring Slovenia than with the local Slovene community (Brezigar 2013). We wonder whether anything has changed in recent years and whether learning Slovene has had a positive influence on the desire to get to know the locals and their culture. That is, we wonder whether the awareness among representatives of the Slovene community in Trieste and among Slovene citizens in the Republic of Slovenia about the increased attention and interest shown by the Italian majority population towards their language could help their sense of belonging and

identity formation, which is still quite hesitant among youngers on this front (see the research by Munda Hirnök & Lukanovič and Obid on the process of identity definition among young representatives of minority communities on the Slovene borders in Obid 2018), or, at least in some changing form, with a detachment from discourses about national and ethnic identity as felt by previous generations and a greater interest in the values of plurilingualism (Brezigar & Vidau 2021, 100).

On the other hand, the teaching and learning of neighbouring languages is quite well supported at the European level with documents that are particularly rich and meaningful, whose only downside is their non-binding nature.<sup>3</sup>

## 2. Research

### 2.1 Method and Research Questions

We conducted qualitative research, mainly through document analysis, and specifically:

- a) the selection and analysis of national and local language policies supporting the teaching of a minority language in Italian mainstream schools;
- b) the analysis of documents available on the websites of mainstream school institutions situated in the province of Trieste concerning the teaching and learning of Slovene in the last six years. The documents are now all included in a framework document titled PTOF *Piano Triennale dell'Offerta Formativa* (Three-Year Educational Offer Plan) that can be found on each institution's website.

We identified six out of 16 comprehensive mainstream institutions as Slovene project holders (see further paragraph 2.2).

We corroborated the document analysis of the identified schools through direct verification (telephone interviews) with the coordinators regarding the existence, functions and organisation of any kind of project for the teaching of Slovene in their institutions. Four out of the six schools took part in our interviews.

The study ran at the beginning of the school year 2020/21 (October 2020–January 2021). Many difficulties related to the Covid-19 pandemic were encountered in data collection as schools practically barricaded and isolated themselves. The teachers covering the instrumental functions of coordination of the projects changed and the school offices proved difficult to reach for research purposes as they were committed to solving problems of daily urgency.

The research questions we tried to answer were:

- to what extent – from a viewpoint of curricula, didactics, and language policy – is Slovene taught and learned in Italian mainstream schools of the province of Trieste?



- how much do the projects included in Italian mainstream schools imply a direct relation with the Slovene community or the schools of the Slovene community?

## 2.2 Results

### **a) Selection and analysis of national and local language policies supporting the teaching of a minority language in Italian mainstream schools**

In Italy, i.e., in the region of Friuli Venezia Giulia, the Slovene language is protected by international treaties and conventions as well as national and regional laws, all of which have enabled the preservation of the language and culture of the Slovene communities in the province of Trieste and, although less effectively due to later legislative intervention, in the provinces of Udine and Gorizia<sup>4</sup> (cf. Bonamore 2004; Cavaion 2016, 23–28).

The current law regarding the teaching and learning of minority languages in mainstream schools is the national Law No. 482/1999 – Regulation for the Protection of Historical Linguistic Minorities (Legge 15 dicembre 1999, n. 482). Law No. 482 of 15 December 1999 describes under Art. 4 the possible measures and the type of organisation that school institutions can take to provide linguistic education that includes the teaching and learning of minority languages or the vehicular use of the minority language.

Despite Law No. 482 and its implementing decrees (DPR 345 2001) that allow for intervention in schools, as far as minority language teaching in Italy is concerned, there is nothing compulsory, only advisable actions left to the discretion of each school. It is a complicated “knotty whole” of norms that “allow” schools to set up projects involving minority languages, which still depend very much on parents’ wishes and attitudes toward the minority language, as Serena claimed almost twenty years ago (Serena 2003, 33).

In fact, Italy has not yet ratified the European Charter for Regional or Minority Languages (CoE 1992) which it signed in 2000. The ratification of this document would demonstrate a concrete commitment and improvement in terms of the promotion of minority languages even among individuals who do not speak these languages but wish to learn them (see Art. 7g in Objectives and Principles of the Charter).

Consequently, there is neither a national plan for the teaching and learning of minority languages in Italian compulsory schools nor a regional inclusive multilingual language policy for the multilingualism of a region (e.g., Friuli Venezia Giulia, characterised by the presence of different languages such as German, Slovene and Friulian). These languages are currently preserved and protected under local regulations, but not promoted through a substantial and coherent regional multilingual policy, except for the Friulian community that can rely on the



General Plan of Linguistic Policy (the last one applying to 2021–2025) (ARLEF 2021), an instrument through which the Friuli Venezia Giulia Autonomous Region – in the sense of Article 25 of the LR 29/2007 – sets the future strategies for the development of the Friulian language, with particular reference to the areas of corpus, public administration, school, new technologies, mass media and social promotion.

The local education office of Friuli Venezia Giulia (Ufficio scolastico regionale FVG) does have an official responsible for the promotion of regional minority languages, but the Slovene language, unlike Friulian and German, is not promoted at all, as can be seen from the office's website (USR-FVG 2020).

There are also no references to the teaching of minority and regional languages in the Ministry of Education's national guidelines for school curricula (MIUR 2012) and its extension (MIUR 2018). There is a whole paragraph on the importance of promoting multilingual education, but only guidelines for teaching English or the second community language are provided.

The only measures to promote the teaching and learning of minority languages in mainstream Italian schools are two calls for the voluntary presentation of projects in the field of minority languages which implement Law No. 482/1999 and Law No. 38/2001 (Legge 23 febbraio 2001, n. 38).

The first is a national call – Financing plan for minority languages. Presentation of projects in the field of minority languages (Art. 5 L. 482/1999)/Piano di finanziamento Lingue di minoranza. Presentazione dei progetti nel campo delle lingue di minoranza (art. 5 L. 482/1999) – derived from Law No. 482/1999 (see the website of MIUR – Lingue di minoranza – Piani di intervento e finanziamento).

The second is a regional call – Call for funding teaching activities related to the teaching of languages and cultures of historical linguistic minorities/ Bando per il finanziamento delle attività didattiche relative all'insegnamento delle Lingue e Culture delle Minoranze Linguistiche Storiche – supported by both Law No. 482/1999 and Law No. 38, 23 February 2001 (see the website of Regione FVG – Piano regionale triennale per il potenziamento dell'offerta formativa (POF): insegnamento delle lingue e culture delle minoranze linguistiche storiche).

These two measures were first implemented after 2001 when the laws came into force, but both have been significantly cut back financially over the ensuing years. Nevertheless, many projects were already running in earlier years, as testified by the Ministry of Education's publication on the implementation of Law No. 482 in mainstream schools (MIUR 2010).

The main objective of both actions is to promote interventions related to the teaching of the languages and cultures of historical linguistic minorities and to strengthen the multilingual and multicultural identity of the community represented in the territory, in this case, Friuli Venezia Giulia.

The national call specifies that projects will be evaluated according to very precise – and in our opinion, ambitious – criteria, which follow Article 4 of Law

No. 482/1999, namely:

- teaching in the minority language as part of the curriculum, carried out by teachers from the school who have appropriate language skills;
- application of the integrated method of vehicular teaching, ensuring the achievement of the objectives of competence development for all pupils, using the CLIL methodology;
- production of transferable pedagogical and didactic multimedia materials, also with a playful approach to transferability, must be understood not only as diffusion of the product but above all as methodological innovation and process innovation;
- multilingual cooperation, to stimulate exchange between different linguistic and cultural realities present in the same territory or different territories;
- skills review and assessment of acquired skills, abilities and knowledge through the use of models such as grids, maps, class or board diaries that are easily applicable and transferable to other minority contexts;
- network collaboration and representation in the territory through a broad and conscious synergy with local authorities, confirmed by memoranda of understanding or agreements with institutions, associations, research centres, and universities;
- production of music, sounds and songs that characterise our minority languages.  
 (Home page of the web site MIUR – Lingue di minoranza – Piani di intervento e finanziamenti).

As a final reflection on the policy analysis, we propose a consideration in the context of Slovene language policy, which is well outlined in the last Resolution on the National Programme for Language Policy 2020–2024 (Resolucija o nacionalnem programu za jezikovno politiko 2020–2024 RS 2021)<sup>5</sup> and the underlying document titled Legal Regulation and Programme Documents on Language Use and Practices of Language Users in the Republic of Slovenia and Users of Slovene Language in Neighbouring Countries and in the World/Pravna ureditev in programski dokumenti o jezikovni rabi in praksah jezikovnih uporabnikov v RS in uporabnikov slovenskega jezika v sosednjih državah in po svetu (Komac & Kovač 2018).

In the Resolution 2020–2024, the only paragraph concerning Slovene outside Slovenia deals with Slovene communities in neighbouring countries (paragraph 2.1.3.2.1 Slovenske skupnosti v sosednjih državah). Here the focus is on the knowledge and use of Slovene as a second language or heritage language.

In the document Legal Regulation and Programme Documents on Language Use and Practices of Language Users in the Republic of Slovenia and Users of Slovene Language in Neighbouring Countries and in the World (Komac & Kovač 2018), Slovene outside Slovenia is constantly mentioned as the language

of the autochthonous Slovene population living beyond Slovenia's borders (Italian, Austrian, Hungarian, and Croatian), but we also noted the emphasis on the current challenges for those minority Slovene communities, as "there is a growing interest in learning Slovene in schools with Italian as the language of instruction" (Komac & Kovač 2018, 99), and the link with school autonomy as a way to adapt the curricula to local needs and contexts, such as knowledge and understanding of the territory (also described in Bogatec & Lokar's (2016) study of Slovene teaching in a lower secondary school in Trieste). Could this document convince pedagogical actors in Slovenia of the importance of disseminating the Slovene language in compulsory education in neighbouring countries? This would imply what Grgič (2019) calls cross-border education.

#### **b) Analysis of documents available on the websites of mainstream school institutions situated in the province of Trieste concerning the teaching and learning of Slovene in the last six years**

From our analysis of the documents available on the websites of all mainstream comprehensive schools in the province of Trieste concerning the teaching and learning of Slovene, we have deduced that the teaching of Slovene within the Italian compulsory school system in the province of Trieste is offered in six out of 16 institutions.

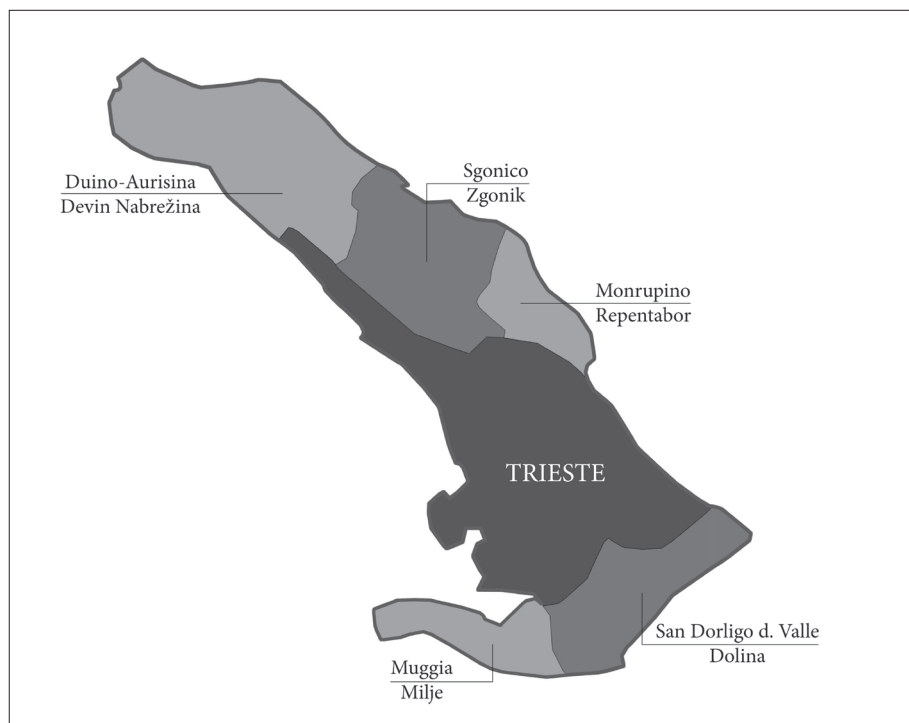
Nevertheless, this teaching is offered incoherently since Slovene is taught as a minority language (as will be described later on) in only a few mainstream primary schools (pupils between 6 and 10 years of age) – in most cases as an extracurricular activity, i.e., not in accordance with the requirements of Law No. 482, which speaks of curricular activities – and as a European Community language (namely as a foreign language, officially since 2007) in two lower secondary schools (pupils aged 11–14), which means that it is not taught as a regional, minority language or as the language of the environment.

The geographical context of the schools

The study was conducted in the school year 2020/21 in mainstream Italian schools in the province of Trieste, which includes six municipalities (see Figure 1 below):

- Duino Aurisina/Devin Nabrežina
- Monrupino/Repentabor
- Muggia/Milje
- San Dorligo della Valle/Dolina
- Sgonico/Zgonik
- Trieste

*Figure 1: Map of the Province of Trieste and its municipalities*



Source: own data © Paolo Monello.

There are 16 mainstream comprehensive institutions with Italian as the language of instruction and five with Slovene as the language of instruction in the province of Trieste, scattered among the six municipalities which all belong to the Slovene settlement area protected under Law No. 38/2001.

Each institution includes one or several kindergartens (ISCED 0<sup>6</sup>), primary schools (ISCED 1) and lower secondary schools (ISCED 2), depending on the size of the neighbourhoods they serve in the municipalities.

As evident from the educational offer plan for the last six years (PTOF, see further), which is posted on the homepage of the school, we arrived at the figure of six institutions out of 16 that include the learning of Slovene in their educational plan.

This result is in line with the results of a previous study we conducted in 2015 and presented at the conference *Lo sloveno per i ragazzi di Trieste* on 19 May 2015 in Trieste (Cavaion 2015), where the same comprehensive institutions promoting Slovene were listed:

- “R.M. Rilke” in Duino/Devin, including the villages of Sistiana/Sesljan, S. Croce/Sveti Križ, Aurisina/Nabrežina, Villaggio del pescatore/Ribiško naselje;

- “Altipiano” in Opicina/Opčine, including the villages of Banne/Bane and Prosecco/Prosek;
- “San Giovanni” in Trieste;
- “Iqbal Masih” in Trieste;
- “G. Lucio” in Muggia/Milje;
- “G. Roli” in Trieste and San Dorligo della Valle/Dolina, including the villages of Bagnoli/Boljunec and Domio/Domjo.

The schools cover almost all the municipalities of the province.

Analysing the documents (PTOF) reporting on projects of teaching and learning Slovene, we tried to find information on:

- a) when the project of teaching and learning Slovene was started;
- b) why it was started, i.e., who or what stimulated the introduction of Slovene in the institution;
- c) what kind of actions were organised, to whom they were addressed;
- d) Slovene partner institutions involved;
- e) curricula, documentation and references to national or regional legislation;
- f) type of financial support used.

Below, we report the results of the PTOF analysis and the answers we received in the interviews with the project coordinators of four of the six institutions where Slovene is taught and learned.

We must say that the extraordinarily creative nature of these projects and the enthusiastic response of the coordinators have convinced us of the importance of carrying out a more in-depth study in the near future, aimed at analysing the methodology and impact of these projects on some aspects of linguistic and intercultural education, and making the methodology used more visible and available for scientific studies of minority language teaching and for other Italian school institutions that would take up the teaching of the Slovene language.

These results were highlighted in the paragraph of PTOF about the school environment and by the teachers and coordinators we interviewed:

- a) The projects started around 2000 thanks to the financial support guaranteed by the enacted laws. The last one started in 2012 (Muggia/Milje). The actual beginning of the projects – which in some cases is difficult to determine and took place before 2000 – refers to experimental actions proposed by teachers, which slowly developed into school projects that implied the collaboration of their associates and the support of the principals.
- b) The context and the main reasons for starting the projects were:
  - the desire and request of families to ensure a multilingual education for their children and in some cases to regain contact with their Slovene origins (mentioned in all six institutions and confirmed by the coordinators of the projects);

- the bilingual environment in which the schools are located, which creates the possibility of extracurricular encounters (four out of six institutions);
  - Italian pupils attending Slovene sports clubs, i.e., extracurricular interethnic contact (three institutions);
  - pupils attending Slovene schools and then transferring to Italian institutions (mostly Italian pupils) with some knowledge of the Slovene language which they did not want to lose (one institution);
  - the proximity to the border, which represented an opportunity for Italian pupils to attend Italian institutions on the other side of the border, in Slovenia. Learning Slovene in Italian schools helped in the return of this outgoing group of pupils (one institution).
- c) The actions organised concerned both the teaching of Slovene in school time and in extracurricular time and interdisciplinary paths to learn the language of the environment and the historical context and meeting Slovene speakers and representatives of the Slovene community. Slovene is the mother tongue of all teachers but one, who master a B2 CEFR level in the Slovene language.

The above actions can be summarised as follows:

- teaching Slovene in curricular time throughout the school year in all primary school classes (Duino Aurisina/Devin Nabrežina);
- raising awareness of the Slovene language and culture in primary schools through a five-step path module in curricular time (last two years of primary school, 10–11 years old pupils) (“Iqbal Masih”, Trieste);
- virtual and face-to-face encounters during school time between Italian and Slovene schools also coming from Slovenia (Sežana), and drama-based activities (“San Giovanni”, Trieste);
- extracurricular courses (in the afternoon) organised at two levels – beginner and advanced, 20 hours each – for students in the last three years of primary school (9–11 years) and grades 1 and 2 of lower secondary school (11–13 years) (“Altipiano” of Opicina-Opčine and “G. Roli” of Trieste and San Dorligo-Dolina). It is noteworthy that this type flourished about ten years ago before cuts in funding drastically reduced its availability. One interesting experiment was made by the institute “Altipiano”, which offered an online course at the time of the Covid-19 pandemic that attracted many students this year (as reported by the coordinator of the project).
- workshops on the history, traditions, and arts of Slovene culture, including, before the pandemic, visits to Slovene institutions in Trieste and Slovenia (“G. Lucio” of Muggia-Milje).
- two out of six schools (“Iqbal Masih” of Trieste and “G. Lucio” of Muggia-Milje) included Slovene as a second foreign language in their lower secondary programmes following the rule of foreign language teaching



and learning, with a final ministerial examination. Here it is important to note that although the schools are geographically embedded in a socio-linguistic context characterised by the presence of the Slovene community, the teaching of this language is promoted as a European Community language and not as a language of the environment and of the autochthonous linguistic community. The consequences are, for example, a lack of possibility of financial support for the development of materials and problems related to the recruitment of teachers. The same schools are involved in actions based on contacts with schools in Slovenia where pupils learn the Italian language (Progetto Contatti!).

- d) Five of the six institutions that promote the Slovene language base their projects on cooperation with schools with Slovene as the language of instruction. The cooperation consists of teacher exchange, encounters of classes, joint development of interdisciplinary pathways or participation in local or cross-border literary, historical, geographical or mathematical competitions (all these activities are attributed greater importance by the Muggia/Milje school).

One school is very active in exploiting local networks such as Slovene associations, scientific research centres, universities and cross-border contacts with naturalistic associations in neighbouring Slovenia (the Muggia/Milje school).

- e) In the PTOFs of schools offering the teaching and learning of Slovene, there are no references to national, regional or European regulations, laws or other documents on the teaching of minority languages. Only one of the six institutions cited Law No. 482 as a reference for its projects, but only in relation to financial issues.

Curricula and other planning documents are not available for consultation or evident from the PTOF, except for the teaching of Slovene in lower secondary schools, where the curricula follow the national guidelines for the teaching of a second foreign language. In Italy, the curriculum is prepared by the teachers based on national guidelines. These two curricula are interesting because they attach more importance to the language of the environment than to the teaching and learning of a foreign language. They seem to us good examples of schools which are aware of their work in the classroom being positively influenced by the environment and able to overcome an inadequate language policy.

As far as the teaching of Slovene at the primary level is concerned, the schools' websites are crowded with ministerial calls and, this year, with information about the Covid-19 pandemic; no links to projects promoting the Slovene language are visible. On the other hand, as testified by the teachers, there are many materials prepared and we presume there are plans for intervention in schools. This is one reason we should conduct a more thorough investigation.

One institute in the city centre – of the six we have presented so far – runs a project to promote a multilingual and intercultural curriculum, following a specific project of the region Friuli Venezia Giulia and inspired by a European call for the development of plurilingual curricula. It is stated in their PTOF that the school promotes all languages spoken by the pupils and their families.

- f) All projects mainly used regional financial support through regional funding for minority language activities. A few used national financial support. Three were involved in Interreg EU projects (Jezik, Eduka, Eduka2). In the last two years, general European funding was used to combat early school drop-out (the PON programme).

### 3. Teaching Slovene in Italian Mainstream Education: Discussion and Reflection on the Results

Despite the lack of national, regional and cross-border language education plans, Slovene is taught with great creativity and some sort of a bottom-up approach in a few mainstream schools in the province of Trieste. Schools take advantage of the only two possible initiatives regarding the teaching of minority languages in Italy, namely a national and a regional financial requirement (the latter is the one that is used the most). Exceptionally, Interreg programmes were used, but rather to promote culture and interethnic encounters than to teach languages. Unfortunately, the number of schools promoting Slovene has not increased over the last ten years, which we believe is related to the financial cuts experienced by the national and regional intervention plans in recent years.

The majority of schools that include projects to promote Slovene are institutions located in bilingual municipalities, where the very mixed local social fabric seems to be the true underlying impetus for all initiatives. The two institutions located in the municipality of Trieste (“Iqbal Masih” and “San Giovanni”) have contact with the minority community, very probably because these neighbourhoods are also characterised by old Slovene community settlements (the neighbourhood of San Giovanni and the neighbourhood of Melara). In one institution in the city centre, the promotion of Slovene is part of a broader context of a regional project on plurilingual education. This might be an easier and more inclusive means for the promotion of minority languages in mainstream schools, but in our opinion, school communities should be better informed, aware and sensitised regarding the great opportunity to develop language education through minority language teaching. In short, there is a lack of visibility of these experiences and of the possibility to develop projects for minority languages.

European guidelines and recommendations on minority and neighbouring language teaching could help schools in this region make the teaching and learning of Slovene a matter of European citizenship, but the official documents de-

scribing the institutions (the PTOF) we analysed do not refer to such guidelines or EU communications. Are these mainstream school institutions even aware of their existence?

The documentation on the projects promoting the teaching and learning of Slovene uploaded to the schools' websites is not detailed and does not allow for a scientific reflection on the quality of the projects and on the extent to which the projects comply with the criteria required by the national call for proposals. We can assume that the reason schools opt more frequently for regional financial aid, which is much lower than national, is because it is very difficult to meet all the requirements for national support. The question we pose is: how could schools actually meet all the requirements in a region where there is no language policy support, no teacher training, and no information campaign regarding the teaching of minority languages among mainstream school institutions and civil society?

We believe that the summarised experiences deserve a deeper analysis through a more participatory quality study that includes visiting schools, conducting interviews and analysing the materials produced, which was indeed our intention but was prevented by the Covid-19 pandemic.

The type of actions proposed in the projects considered are quite varied and interdisciplinary. They largely come from the personal experience of the project coordinators (information obtained through telephone conversations) and are stimulated by a social context in which contacts between the majority and minority language communities seem to be improving. All the projects analysed offer the actual teaching of Slovene and not only the promotion of cultural or even folkloristic aspects of Slovene culture like the previous projects, an aspect denounced in the MIUR report about the presence of minority languages in Italian schools after 10 years of legal enforcement of their preservation (MIUR 2010). Teachers, families, and representatives of the Slovene community seem to make a concerted effort to make the promotion of the Slovene language a matter of intercultural encounters and an opportunity to make up for the missing regional and national integrative policies and a wounded historical past that still requires space for debate to improve knowledge and overcome lingering divisive aspects of shared history. Slovene mother tongue teachers employed in Italian institutions are valuable key actors for local social integration and, we dare say, for the construction of a mature plurilingual and pluricultural society.

To answer our research questions – i.e., at what point, from the point of view of curricula, didactics and language policy, stand the teaching and learning of Slovene in Italian mainstream schools of the province of Trieste and to what extent the projects in Italian mainstream schools imply a direct relationship with the Slovene community or with the schools of the Slovene community – we can assert that the teaching of Slovene in mainstream schools is still far from having a well-structured and well-organised curriculum. We were unable to in-

investigate didactic aspects despite the great diversity of funded measures and the interdisciplinary nature of the projects. Language policies, national and regional, are non-existent. Language education policies are non-binding. The result is the fragmented nature of Slovene language teaching, which depends on internal human resources and the schools' own ideas. Nevertheless, the projects carried out in Italian mainstream schools imply a direct relationship with the Slovene community and, in most cases, with the schools of the Slovene community and the local Slovene associations and institutions (library, theatre, newspapers, etc.), as well as with neighbouring Slovenia. These relationships could not be analysed qualitatively but the fact that the projects continue may be interpreted as a result of successful contacts and exchanges.

The results lead us to an important reflection on the potential of the school environment and the projects involving several schools and other types of institutions for the dissemination of the Slovene language and culture in the mainstream society, as well as for the contextualization of this language learning. In fact, this context seems to offer a pedagogical starting point that is not linked to an instrumental motivation, like the one that can stimulate adults who enrol in the numerous language courses promoted by local cultural associations, but to the schools' desire to offer their users a real experience of interpersonal and cultural contact that might one day become a more mature and autonomous desire to learn more about the Slovene culture and language as the language of the environment.

## 4. Conclusions

In this paper we provided an overview of the presence, function and actions related to the teaching and learning of Slovene in Italian mainstream primary schools in the province of Trieste as an exceptional opportunity, after 30 years of Slovenia's independence and almost 25 years of open borders, to reflect on Slovene as a minority and foreign language – a definition we have problematised and better identified in the concept of the language of the environment – in the majority population of Italy, to better identify the interethnic relations it fosters, and to ask whether it can be considered an element of awareness development in the process of identity development of the kin state Slovenia and the Slovene minority community.

The thesis hereby expressed, within the scientific framework of regional and cross-border studies, minority language teaching studies and intercultural language studies, is that the teaching of Slovene within the compulsory education of the neighbouring Italian majority population can importantly contribute to the development of a more authentic and mature reciprocal contact area where the image of Slovenia, its language and culture, can be valued and reinforced in and through the eyes of neighbouring otherness.

From a sociolinguistic viewpoint, it is quite astonishing that a divisive linguistic policy has so far characterised and persists in this area where, as this research demonstrates, there are Italian school institutions very much engaged in the teaching and disseminating of Slovene language and culture, yet not at all supported by national and local policies.

The projects analysed and their school communities – i.e., the type of actions proposed that focus on the teaching and learning of the Slovene language and on important aspects of its culture, envisaging a spontaneous intermingling of the Italian and Slovene communities and embracing the Slovene language in all its aspects of identity – are meaningful indicators of a civil society that does not want to miss the opportunity to grow through the gift of its multilingual and multicultural background. Could these projects pave the way for new and important reflections within the Slovene and Italian majority communities and the Slovene minority community in Italy on the great potential of teaching and learning each other's languages as a tool for shared social and human growth?

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## Notes

- <sup>1</sup> Primary education is organised differently among European countries. Italy follows a common core curriculum system with primary schools for pupils aged between six and eleven years – ISCED level 1 (International Standard Classification of Education – ISCED, developed by the UNESCO, see [https://ec.europa.eu/education/international-standard-classification-of-education-isced\\_it](https://ec.europa.eu/education/international-standard-classification-of-education-isced_it)) – lower secondary schools for pupils aged 11–15 – ISCED 2 – and upper secondary schools for pupils aged 15–19. Slovenia has a single structure school system including ISCED levels 1 and 2, recognised as 'primary education' for pupils aged from 6–16.
- <sup>2</sup> Centralni urad za slovenski jezik, <https://www.regione.fvg.it/rafvf/cms/RAFVG/cultura-sport/patrimonio-culturale/comunita-linguistiche/FOGLIA25/>.
- <sup>3</sup> In fact, the European Union includes the teaching of neighbouring languages in its Recommendations and Communications, all documents which have the function of guiding member states whilst not obliging them to accept the proposed actions. We list them here, but for a more detailed reading we refer the reader to Cavaion 2020a:
  - Recommendation Rec (2005)3 of the Committee of Ministers at Teaching Neighbouring Languages in Border Regions (CoE 2005);
  - Europe, Frontiers and Languages by Albert Raasch (2002);
  - Rewarding Challenge: How the Diversity of Languages Could Strengthen Europe (Maalouf et

al. 2008). It reports on the European Commission's proposal on the need to "develop bilateral relations between the peoples of the European Union", especially where conflicts have divided neighbouring countries.

- the most recent European document entirely dedicated to border areas – Boosting Growth and Cohesion in the EU Border Regions (EC – European Commission 2017);
- finally, there is a more specific European document related to language teaching, also from the European Council – Proposal for a Council Recommendation on a Comprehensive Approach to the Teaching and Learning of Language (EC – European Commission 2018) –, which focuses on the need for innovation in language teaching, promotes its potential by proposing important measures to integrate and connect between the specificities of the border context and the broader context of the social and cultural growth of Europe itself and its citizens.

<sup>4</sup> As Brezigar (2004, 75) reports, three different models have been created for the protection of the Slovene-speaking minority in Italy: the model of Trieste (since 1954 as a result of the London Memorandum and since 1975 of the Treaty of Osimo), the model (of the province) of Udine, where the existence of the Slovene language minority was not recognised until the adoption of the national protection law L482/2001, and the model of the Goriška region, based on the partial fulfilment of Article 6 of the Constitution of the Italian Republic, especially in the field of minority education, where the situation was similar to that in the province of Trieste.

<sup>5</sup> At the time when the research was conducted, the last resolution on the Slovene language 2020–2025 (Resolucija o nacionalnem programu za jezikovno politiko 2020–2025) was not published yet.

<sup>6</sup> See endnote 1.

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Ana Toroš

## The Coded Literary Discourse of the Senjam Song Festival of Benečija

The following article discusses the poetic output in Beneška Slovenia (Benečija) written for the Senjam Song Festival of Benečija. While considering the context of the region's history and migrations, it focuses on the literary aspects of the festival, particularly on the analysis of the themes and the poetry writing technique. It builds on certain theoretical premises from literary imagology and psychoanalysis. The subject of the analysis are the lyrics from the period between 1971 and 2012, published in a three-volume collection featuring over 150 authors. The article notes the following most prevalent themes: issues of assimilation, migration, and the dying of villages in Benečija. Categorised by basic mood, they fall under one of two extremes: they are either cheerful and humorous in order to encourage and bring joy and hope to the Slovenes of Benečija; or they are pervaded with deep pain and concern over the situation in their region. The lyrics of the latter use a particular writing technique, which merely hints at the pressures of assimilation, conveying them through images and metaphors.

**Keywords:** Benečija, migration, poetry, minority, trauma.

### Zakodirani literarni diskurz Senjama beneške pesmi

*V pričujočem prispevku smo obravnavali pesniško ustvarjanje v Beneški Sloveniji, ki je nastajalo v okviru Senjama Beneške pesmi. V prispevku smo se, upoštevajoč zgodovinski in migracijski kontekst, osredotočili na literarne vidike festivala, predvsem na tematsko analizo in tehniko pisanja pesmi, pri čemer smo se naslonili na nekatera teoretska izhodišča s področja literarne imagologije ter psihoanalize. Analizirane pesmi, nastale v obdobju 1971–2012, so bile objavljene v treh zbornikih, pri katerih je sodelovalo več kot 150 avtorjev. Prevladujoče teme pesmi so asimilacijska problematika, izseljevanje ter umiranje vasi v Benečiji. Pesmi se po temeljnem občutenju delijo na vedre, šaljive pesmi, ki želijo bodriti in vnašati vedrino in upanje med Benečane, in na pesmi, prežete z globoko bolečino in zaskrbljenostjo nad razmerami v Benečiji. Slednje uporabljajo posebno tehniko pisanja, ki zgolj nakazuje asimilacijske pritiske in jih ponazarja preko podob in metafor.*

**Ključne besede:** Benečija, migracije, poezija, manjšina, travma.

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## 1. Introduction

The article discusses the poetic output in Beneška Slovenia written specifically for the Senjam Song Festival of Benečija (or Senjam Festival for short), which marks its 50<sup>th</sup> anniversary this year.<sup>1</sup> It is a unique literary production, barely researched in the field of literary history, born out of the distinct socio-political and migratory circumstances in Benečija. The article, within the context of history and migration, focuses on the literary aspects of the festival, particularly on the analysis of the themes and the poetry writing technique. It builds on certain theoretical premises from literary imagology – which introduces the terms I (domestic culture) and The Other (foreign culture) (Pageaux 2010; Leerssen 2016) – and psychoanalysis. It attempts to look at the phenomenon of the Senjam Song Festival of Benečija through the lens of the study *The Uncanny Inner Stranger* (2009) by psychiatrist Pavel Fonda.<sup>2</sup> While Fonda applies his study primarily to the Trieste area of the 20<sup>th</sup> century and the tensions between the minority and the majority, the structure of the relations in Beneška Slovenia is similar. Consequently, we can speculate that the Slovenes of Benečija also suffered collective cultural trauma through the process of forced assimilation from the late 19<sup>th</sup> century onward. An attempt will be made, therefore, to understand the Senjam Festival as a reaction to a “catastrophic anxiety” which forms in a “paranoid-schizoid position” (Fonda 2009) upon facing the demise of one’s culture.<sup>3</sup>

Marija Pirjevec has pointed out that “because of its deeper purposes and meanings” the Senjam Festival as a phenomenon “cannot be classified as mere popular singing and song writing” (Pirjevec 2011, 131). In his papers *Some Remarks about the Most Recent Venetian Poetry* (2013) and *The contemporary poetry of Venetian Slovenia. A model of engaged poetry by Slovenes in Italy* (2016), David Bandelj wrote about the poetics of some of the more prominent authors who have taken part in the Senjam Festival, while Irena Novak Popov (2015) studied the festival through the lens of the revival of dialect poetry.<sup>4</sup> During the 2005 Vilenica International Literary Festival, Roberto Dapit identified the native land and the mother tongue as the two most typical motifs of contemporary Slovene literary production in Benečija (Dapit 2005, 379). In addition, Anna Bogaro writes about the poetry of Beneška Slovenia in her book *Letteratura nascoste* (2011, 111–131).

## 2. The Uncanny Inner Stranger

In his study, Pavel Fonda (2009) draws on Freud’s reflection on the uncanny, wherein he distinguishes between suppressed content and dissociated content. Suppressed content relates to the inner stranger, and in this context, it also relates to the suppressed elements of one’s own ethno-national identity. Dissociated content refers to the unrecognised self-image of an individual or a group,



which is vastly different from the self-image that an individual or a group consciously holds. For the purpose, he highlights three categories of a person's or group's mental positions, which represent the process of development and maturation: the undifferentiated position; the paranoid-schizoid position: a person or group perceives every experience as either good or bad, but anything bad is projected onto the outside world; the depressive position: a person or group manages to tolerate their own flaws. The co-existence of love and hate towards the same object is accepted. When facing danger, a group will regress from the depressive position into the paranoid-schizoid position, which makes it easier to close ranks, identify the common enemy, and enforce both positive emotions towards one's own group and negative emotions towards the outside world. In this position, the world of objects will be reduced to the enemy group versus the idealised object/group to which one belongs. According to Fonda (2009), regression from the depressive into the paranoid-schizoid position causes a rupture in the semipermeable membrane separating the collective from the individual. In the process, collective stereotypes (the severely dehumanizing perception of the other, for example) will penetrate the mental space of an individual. The stereotypes formed in the paranoid-schizoid position correspond poorly to reality, because the perceived images of others become distorted by the negative content of the self that one projects onto them. The stereotypes/images adopted from the group culture become the inner objects/images that determine the way one relates to the members of one's own, as well as other groups (Fonda 2009, 101–134).

Saying that, it is necessary to point out, in the context of this article, that members of a minority will subconsciously introject a number of their own perceptions, as well as the majority's perceptions of their national identity. They will, therefore, find within themselves two stereotyped national identities: the way the minority sees itself and the way it is perceived by the majority.

By internalising the national culture of the majority, the minority will also subconsciously adopt negative images of itself, and it requires a lot of energy to suppress them. As a result, it will possess both an idealised group image and an introjected negative image of itself.

In the literary discourse of Slovene writers in Italy,<sup>5</sup> the introjected negative image is symbolised by the insulting word *ščavi*.<sup>6</sup> The lyrics to the Senjam songs also use various images to convey this most painful part of self-perception, which self-deprecatingly bring down the level of the language to that of a dog barking: "When you bark at others here, / I can see they have a hard time understanding / perhaps ... I think ... it could be / that you bark in Slovene, like all of us" (Trusgnach et al. 2013, 66).<sup>7</sup> Also noticeable is the critical self-image of a weak, helpless community, which can also be understood as an introjection: "Why was my language fearful / of defending my home?" (Trusgnach et al. 2013, 20). Sometimes the lyrics contain a negation of this image; it stems from the introjected idealised image of the minority (the way the minority sees itself): "We never

hang our heads / no, it can't happen again / that we reply 'Si signore!'" (Trusgnach et al. 2000, 99). Let us look at the lines by David Klodič from the same perspective: "Lower your voice, so no one can hear, / I am now very respected here" (Trusgnach et al. 2013, 27).

According to Fonda (2009), a traumatic experience has to be processed properly, and this is often beyond the scope of an individual/group, who therefore remains in a paranoid-schizoid position. For the Slovenes of Benečija, the processing of the trauma is made difficult by the uncertain situation the minority experienced in the decades after World War Two – the circumstances in Benečija remained unfavourable for the Slovene language and culture to thrive even after the war (Kacin Wohinc 2001, 153–154), while the law on the protection of the Slovene minority was passed as late as 2001.

### 3. The Fear of the Ultimate Demise of One's Culture

If the literature of the Slovenes in the Trieste region formed its distinct common attributes at the turn of the 20<sup>th</sup> century with the rise of fascism as, we can assume, a reaction to the traumatic experience of the repression of Slovene culture and to the aggressive anti-Slovene discourse in the Italian regional literature of the time, the literature of the Slovenes in Benečija seems to contain something more than mere cultural trauma: another crucial element in the momentum for literary production – the fear of the ultimate demise of one's culture. From a psychoanalytical point of view, as Pavel Fonda (2009) explains, the demise of a group's culture generates catastrophic anxiety. As the subsequent analysis of the themes will show, the poetry of the Senjam Festival consistently speaks between the lines about life, and therefore Slovene culture, dying out in Benečija, so we can assume that the latter is the momentum behind the fifty years of poetic creativity.

This assumption is corroborated by Aldo Klodič's foreword to the third volume (Klodič 2013, 3) of the collection, containing song lyrics from between 1996 and 2012. He points out that the festival is at an important crossroads, as the older generation is passing the torch to the young. As a result, the themes seem to be more varied: from the authors

who still describe with nostalgia our peasant Slovene culture [...] we have moved to the more specific emotions of our young people, who, nevertheless, still can't break away from the heavy and unfair wounds that assimilation tried to inflict upon us. Hopefully, this search for something new will continue to preserve us and prolong the life of our Senjam and our national Slovene community (Trusgnach et al. 2013, 3).

The catastrophic anxiety is also present in the lyrics of the festival songs themselves, during the entire analysed period, e.g.: "if we go on like this, / we'll lose our blood, as well" (Trusgnach et al. 2000, 21). The song *For You Who Come*

*Among Us* contains the following self-image: “We are / a bit tough / where we fear / to lose our soul” (Klodič 2013, 70).

## 4. Migrations from Benečija

Several factors have contributed to the gradual decline of Slovene culture in Benečija: besides assimilation, mass migrations have also played a part. In his study *Material on Emigration from ‘Venetian Slovenia’: The Case of the Comune of Sovodnje/Savogna*, Aleksej Kalc points out that this Slovene ethnic territory cannot be understood without its history of emigration (Kalc 2000, 175). Migrations from Benečija coincide with migrations from the rest of the hilly regions of Furlanija/Friuli, but with some deviations. Friuli began to see considerable migrations in the 19<sup>th</sup> century, as a result of demographic and socio-economic changes (e.g., the crisis of the agrarian and pastoral mountain economy). Migrations from Benečija, on the other hand, occurred later than those from other upland parts of Friuli and began on a small scale. They increased after World War One and continued into the late 1920s. Migrations from Benečija then scaled down again but became steadier; people tended to move overseas, to work in mining and construction. These changes coincided with the global economic crisis and the shrinking international labour market, as well as the restrictive Italian emigration policies after 1927. A new wave of migrations from Benečija began after World War Two, due to the difficult economic situation in the country, particularly in its mountainous and foothill regions. At that time, Italy included the export of workforce among the programme guidelines of its economic policies and entered into an intergovernmental agreement with Belgium, which needed workers to jumpstart its coal industry. Belgium thus became one of the destinations of the Slovene migrants from Benečija; others included France, Switzerland, England, Yugoslavia, and the industrial parts of Italy. Later, the flow of migration also turned towards Canada, Australia and Germany. A radical shift in the nature of migration occurred at that time: if before they had been temporary, people were now leaving the valleys for good (Kalc 2000). All of this is reflected in the poetry of the Senjam Festival, for the launching of which the post-war emigration wave was key. As Kalc points out,

the familiar process of the demographic decline in Benečija had thus began, and in the decades following World War Two the region lost over half of its population. [...] In comparison to the rest of the upland parts of Friuli, Benečija suffered a much more dramatic process of depopulation, which was only partly due to the “natural” socio-economic tendencies. In fact, the blame also lies with the policies of development and spatial planning, which, for political and nationalist reasons, conditioned through positive provisions the economic growth and increasing marginalisation of these areas. In conjunction with the elements of the suffocating anti-Slovene climate enveloping Benečija for long decades after the war, it was an added impetus for the population to emigrate (Kalc 2000, 185).

In the four decades following the 1950s, Benečija recorded a loss of over 60 % of its population.

## 5. The Senjam Song Festival of Benečija – General Overview

For the purpose of this analysis, three volumes of festival verse were reviewed, containing the song lyrics from the very first festival (in 1971) up to those from 2012. As a testament to the ways of life in Benečija after World War Two, the lyrics have an intrinsic ethnographic value. They include the motifs of polenta (Kulturno društvo Rečan 1984, 72); basket weaving (Kulturno društvo Rečan 1984, 61); and chestnuts (Kulturno društvo Rečan 1984, 12).

The introductions to the three volumes highlight the circumstances in which the festival was born, reflecting the catastrophic anxiety surrounding cultural demise (Fonda 2009). The first volume, published in 1984, begins with a foreword by the Rečan Cultural Society, which states that the first Senjam Song Festival of Benečija in 1971 opened with the word night – the title of the very first song ever sung at the festival, written by Elda Vogrig. The foreword explains:

[A]nd there was indeed an imposing, cold, harsh night in the valleys of Benečija. In ever greater numbers, young people were scattering around the world, while their parents at home were forced to leave their land for lack of help. Our Slovene culture was barren, and it seemed this was the end of our people (S. N. 1984, 5).

In the years 1973, 1990 and 2001, the festival was dedicated to church songs. The foreword to the church festival of 2001 notes that “the Church, too, has a good influence on the progress of our people” (S. N. 2013, 97). This mirrors the historic significance of the local patriotic priests for the preservation of the Slovene language in Benečija (Cencič 2008). Understanding the connections between the clergy, faith, and the Slovene identity in Benečija can lead to the deeper layers of meaning in the festival songs of that particular year. In this sense, the lyrics to the song *Dear Mother* also express a concern for the preservation of Slovene identity among young people: “we ask you to keep / all our family / and most of all / our youth / so they don’t stray / from the right path” (Trusgnach et al. 2013, 102). The words to Viljem Černo’s *Easter* should be understood in the same context: “Thorns are the flowers of our land; / our footsteps end up / nailed to your wooden cross. / O, Lord, give us strength / to seize the laughter / of our land, / to inspirit the flower / of our soul” (Trusgnach et al. 2013, 108).

In 1974, the festival took a back seat to other events and did not take place. Financial difficulties have often threatened its existence and were the reason for its cancellations in 1975, 1979, 1993 and 2002 (S. N. 1984, 51; S. N. 2000, 152).

In 1976, the festival did not take place because of an earthquake. 1981 was a milestone year, because the Slovenes from Rezija (Rino Chinese) joined the festival. The festival of 1987 was special because the grand finale was broadcast live on RAI Radio Trst A and Radio Opčine (S. N. 2000, 68). The introduction to the festival hinted at one of the troubles that has often plagued the festival: "It has to be said, though, that this Senjam, like so many before, could not go by without an occasional nail on the road!" (S. N. 2000, 68). As we can see, a particular writing technique was used – simply alluding to, hinting at, certain facts, without giving any detailed explanations or context. Perhaps the fear of consequences for criticising the Other (the enemy group) too loudly may have played a part in this. Not to mention that the participants of the festival, the locals, were only too familiar with the state of affairs in Benečija.

Keeping in mind this writing strategy, we can understand Jože Štucin's foreword to the second volume, comprising song lyrics from 1984 to 1995. Štucin underlines the issue of emigration and the "unkind policy" (Štucin 2000, 5). This volume, too, highlights the verses by Aldo Klodič; this time they address the dying of Benečija: "Where have the grapevines gone / and where are the farmers / who once lived in Benečija?" (Štucin 2000, 6).

2002 was darkened by the loss of the singer-songwriter Francesco Bergnach – Kekko. Together with Aldo Klodič and Luciano Chiabudini, he was one of the most prolific authors in the first volume, which featured some 30 writers. The number of authors more than doubled in the next volume, featuring over 60. Again, Francesco Bergnach – Kekko and Aldo Klodič stood out for their number of contributions. A similar number of writers featured in the third volume, which also saw an increase in collective song writing. The following writers stood out for their number of contributions: Viljem Černo, Aldo Klodič, David Klodič, Luciano Feletig, Michele Obit and Francesco Bergnach – Kekko, who remained an active member of the festival right up to his death.

It was not only the death of Francesco Bergnach – Kekko that hit the festival hard at the time, but also the six-year gap that followed: "The problems were many and varied, but mostly it was the finances and the lack of people" (S. N. 2013, 123). However, this time was used to reflect on past festivals, which resulted in an event called Once Upon a Time There Was a Festival, featuring new cover versions of past songs. Despite the eventual relaunching of the festival, the 2010 introduction, again in fragments, reveals the difficulties the organizers faced: "Volunteer work doesn't cover all the costs of our Festival and financial support from public authorities is dwindling. Consequently, the Rečan Cultural Society has decided that Senjam will become a biannual event" (S. N. 2013, 139).



## 6. Analysis of the Themes

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To start off the analysis, we will refer to the foreword to the second volume, written by Aldo Klodič in the name of the Rečan Cultural Society. He was one of the most prolific and talented festival authors in its 50-year history. He writes:

It is assimilation that weighs most heavily on our people; it has done a big job, gnawing at our bodies and getting almost to our very bones. [...] We've convinced our friends that creativity is a must, even if it germinates in the garden of our dialect culture, and we've shown our opponents that it is our roots we respect and not the roots they've been forcing upon us [...] Many in our Slovene community in Benečija have lent a hand to preserve, develop and enrich our culture, our language and our lives (Klodič 2000, 7).

### 6.1 Root

The word root, in the sense of multi-generational existence firmly entrenched in the land of Benečija, also appears in much later verses by Klodič himself: "We are a tiny / land / and our people / are few / and our tough / roots / help us everywhere" (Trusgnach et al. 2013, 70). The word root is also found in other lyrics, which continue to expand its connotations. Like the 1988 lyrics to *My Little Benečija*: "My little Benečija, / you are my wealth, / this is my homeland / and you are my root" (Trusgnach et al. 2000, 107). Similarly, the lyrics by Daniele Capra, who have the word roots in the title: *Roots*: "It's strange to think / to be so strongly, / to be so bonded / with your village. / There's a force / that keeps me here, / and it's always, always hard to leave. // It's my roots / that keep me here, / in this valley / in these hamlets" (Trusgnach et al. 2000, 154).

In 1996, the metaphorical field of the word expands even further, towards an eternal flow, towards the progeny who will ensure life, a hope of life, for the culture of Benečija: "From an old root / a new flower was born [...] a new, strong flower of Benečija" (Trusgnach et al. 2013, 10). Yet another meaning appears at that time – the root of the spirit: "I will call my friends / to come back here / and look around / [...] they'll see the roots / of their spirit [...]" (Trusgnach et al. 2013, 20).

Let us look at the Izidor Predan's lyrics to the song *The Sun*, which expand the image of the root onto those other, threatening, malicious roots that oppose the Slovene culture in Benečija: "May the sun warm up our valleys / and chase away a century of cold, dry up malicious roots / and save our true face" (Kulturno društvo Rečan 1984, 96). *Like Water Rushing in* by Michel Obit contains a negative utterance of the Other: "We're water rushing in and we're a river flowing, / we won't be stopped by those who'd take / our language, our old rights, / the roots that won't die" (Trusgnach et al. 2000, 162). The Other (the enemy group) is named neither in the forewords to the festival volumes nor in the lyrics



themselves. The Other's main characteristic is that they oppose the blooming of Slovene culture in Benečija. In terms of Fonda's (2009) categories, this is a case of a poetic utterance from the paranoid-schizoid position, which activates when a community is under threat. The position also prioritizes strong community. This is reflected in the festival songs, which are often written in the first-person plural or speak of the problems of the entire community as it is trying to preserve its culture in Benečija.

## 6.2 The Flower Metaphor

Aldo Klodič also wrote the words to the song that opened the festival in 1971 – *Let Us Plant Flowers* – which gave the title to all three volumes of the collection. The key, symbolic message of the title becomes clear in the following lines of the lyrics: "Let us sing – the way we like, / speak and cry – write and read / in the language, – that our mother with all her love / imparted to us in the cradle" (Kulturno društvo Rečan 1984, 11). Aldo Klodič's lyrics from 1995 read like a chorus to these words: "They let us plant flowers, / but they didn't give us strength to fertilise them, / so where they still blossom, / it is only by God's grace, / this is a great miracle" (Trusgnach et al. 2000, 184).

*Let Us Plant Flowers* is not the only one of Aldo Klodič's poems to use metaphors taken from the environment of the Rečanska Valley (withered and trampled flowers, silent birds) in order to draw attention to the pressures of assimilation and to the relation of I versus the Other (those, who are against us, against our Slovene culture in Benečija): "All things stand still there / as if bullied into silence. / I'm thinking: The flowers are ugly, / hanging their heads in shame" (Kulturno društvo Rečan 1984, 30).

These clandestine, sometimes fragmentary messages also appear in the lyrics of other authors. There is a general atmosphere of anxiety, oscillating between encouragement and hope, and desperation over the existence of the Slovene community in Benečija: "People of Benečija, do not despair" (Trusgnach et al. 2000, 142). And in *A Parish Church* by Antonio Sdraulig: "Lord / protect all justice everywhere" (Kulturno društvo Rečan 1984, 40). And also: "We are always giving / light to our valleys" (Trusgnach et al. 2000, 134). On the other hand, there are poems of utter despair, for example: "Too much hatred and too many injustices / keep us from / calling ourselves the sons of our Father" (Kulturno društvo Rečan 1984, 45).

We should mention that as a counterbalance to the analysed lyrics, which are full of anxiety and melancholy as they tackle the painful sides of Benečija (assimilation, emigration, the end of culture), the festival also features light, cheerful songs. They wish to express the joy of life, the lighter side of life; however, they probably do not arise from a genuinely cheerful disposition, but rather from a need for encouragement, from an inner sense of urgency to protect oneself from

despair over the oppression and the demise of one's own identity. The introduction to the 1978 festival songs, which ends in an ellipsis, seems to suggest this: "With these songs, we contribute what we can to make life better for the entire Benečija [...]" (S. N. 1984, 77). Certain festival song lyrics express the same sentiment: "protect my people, too" (Kulturno društvo Rečan 1984, 141); as well as a covert wish for a life of peace, without the pressures of assimilation: "While we, Slovenes from Benečija, would just live in peace" (Trusgnach et al. 2013, 88).

As mentioned before, this and similar cases rely on a particular writing technique – one could call it a coded technique of writing and poetic expression – which is about alluding; approaching and then pulling away; suggesting without being explicit; while all the while assuming that the reader will recognise the hidden message. The point is communicated indirectly, possibly because the subject matter is too painful and traumatic, but also because external circumstances may not favour discussing certain topics. Because of this type of literary discourse, which only describes the effects of events rather than the actual agents and actions – in this case the non-utterance of the Other – the lyrics are coded to a degree, and the meaning is only accessible to the authors' own community. This corresponds to the assumption of a recipient/reader, a member of the Slovene community in Benečija, who knows and lives the underlying reality.

## 6.3 Community

With their identity being under threat, the lyrics communicate the need for community, for the bonding of like-minded people: "We also ask of you, merciful Lord, / to let brotherhood bind us" (Kulturno društvo Rečan 1984, 47). And also: "For now / there's still much to do, / and if we all put on / the love that will keep us together, / we can mend everything" (Trusgnach et al. 2000, 74).

Gabriele Blasutig stresses the importance of a cooperating community in the title of his song *All Together*: "We are the ones who are still here. / We continue on our path [...] all of us who are still here, / should proudly say: 'I live here.'" (Trusgnach et al. 2000, 99). Igor Cerno conveys a similar message in *Let's Join Hands*: "Let's join hands, / let's help each other, / we won't die!" (Trusgnach et al. 2000, 170).

## 6.4 Benečija

Consequently, in the role of affirming the Slovene community and its identity, the word Benečija itself (and sometimes Rečanska Valley) is often used in various phrasings and titles: "I'm a boy from Benečija", "in the valley of Benečija", "from villages of Benečija", "for friends from Benečija", "a boy from Benečija", "a girl from Benečija", "our Benečija lineage", "we are two guys from Rečanska Valley" (Kulturno društvo Rečan 1984, 53, 62, 99, 123, 127, 145, 152, 100), "with a bouncy tune of Benečija" (Trusgnach et al. 2013, 13).

## 6.5 Emigration

Another important festival theme is emigration, represented symbolically in the title of Adriano Noacco's *An Emigrant's Song* (Trusgnach et al. 2000, 190). In the festival's first year, the topic was addressed in the lyrics to the song *A Man* (Franco Cernotta – Izidor Predan), portraying the hardships of Slovene workers from Benečija abroad, particularly in respect to the life and work of miners: "A man went to work in Belgium [...] Nobody knows, / how he was crushed by a minecart [...] Nothing's left of him but a sad memory. [...] A swallow flies across the hill / to provide for her young, / it flies across cities and villages, / across rivers, woods and high barriers" (Kulturno društvo Rečan 1984, 17).

Other festival songs also touch upon the issue, as their titles reveal: *Empty Roads, Where Are You Going?*

The lyrics often talk about **the painful separation from one's birthplace, home and motherland, and about the hope to come back**: "When I was young, / life was hard. / I had to leave my land and go" (Trusgnach et al. 2013, 73). Similarly, the lines by Angela Petricig: "So, two or three from each house / had to leave Benečija" (Kulturno društvo Rečan 1984, 152). And again: "I will come back, my beautiful village, / I will come back, / my hills of green" (Kulturno društvo Rečan 1984, 55).

Aldo Klodič treated the theme masterfully in *Thoughts*: "A swallow is gathering / her family, / to go / on a long voyage. // The night is coming. // Everyone's spurring me on: / off you go, too, / don't wait here / for your death / ... / The heart is crying. / ... / The soil smells so sweet" (Kulturno društvo Rečan 1984, 83).

**The separation from family, mainly parents and partners**, is portrayed as a particularly painful subject: "Once I've earned enough, / I will come back to you" (Kulturno društvo Rečan 1984, 81). Similarly, in the lyrics to *Once There Was a Boy*: "There was hunger, / and he left his old mother / and father at home, / and what was even harder, / his young sweetheart" (Kulturno društvo Rečan 1984, 26). And again, in Petar Zuanella's *Tear*: "The day has come for the boy / to take his suitcase and leave" (Trusgnach et al. 2000, 80).

## 6.6 The Dying of Life in Benečija

Emigration is associated with the dying of life in the villages, and the lyrics are filled with nostalgia for everything that is inevitably disappearing and will only remain in these verses. Lyrics of this type are most numerous during the 1984–1995 period. This corresponds to the timeline of migrations from Benečija described in the beginning, which began in the 1950s and lasted for four decades. Most of these people never returned (Kalc 2000). Viljem Černo wrote: "Oh Mother, what is it that keeps us living here, / we are so few, so old, one could cry

one's eyes out over us. / ... / They were leaving day by day, / and before long we will be gone, as well" (Trusgnach et al. 2000, 148). Luciano Chiabudini's lyrics are similar in tone: "The village is so empty, my heart is breaking / ... / What a lovely dream I had tonight, / our people have come home" (Kulturno društvo Rečan 1984, 79).

Michele Obit is equally straightforward about the situation in Benečija: "Do you remember the days, when we worked and sang / and the old and the young, we were happy, / and I don't know how it can be that our land / is now dying without hope, as people are dying / and the bramble's already overgrowing the old rafters; / how can it be that there's not a thing we can do" (Trusgnach et al. 2000, 162).

Lorette Bernich's words in *The Death of My Village* are also poignant: "Among the flowers, up on the hill, / eight little houses, / ... / ten quiet voices. // There were a hundred voices / ... / They're dying, and my village, / my beautiful village, / is dying with them" (Trusgnach et al. 2000, 52).

## 6.7 The Land

The land is another recurring motif, which continues in the mature years of the festival. The element of the land can appear in the title itself – *My Land*: "My land, / I have to go, / my land, / I'm leaving you / ... / My land, / listen to my heart, / it's only here that it resounds" (Trusgnach et al. 2013, 73). The land can even appear as a personified member of the Slovene community in Benečija: "Raise your head, the land of Benečija" (Kulturno društvo Rečan 1984, 58).

## 7. Changes Over Time

The lyrics of the most recent analysed period of 2008–2012 differ from the rest in the sense that certain topics typical of the earlier periods (emigration, dying villages, threatened identity, language, land) begin to fade away. We notice a shift towards Slovene standard language and the presence of English vocabulary: "*Tell me why*. / Tell me why / you're not coming back to this paradise" (Trusgnach et al. 2013, 159). Albeit as a quote, words in English already appear at the end of Michele Obit's 1994 lyrics to *A Song*: "The answer, my friend, is blowing in the wind, / the answer is blowing in the wind" (Trusgnach et al. 2000, 176).

### 7.1 Linguistic Shifts

The shifts in the language are partly due to the broader involvement of the younger generation. In 2012, "all the protagonists [were] younger than the festival, which was born in 1971; those under thirty played an important role" (S. N. 2013d, 155). The bilingual school, which opened in 1984 in Špeter, contributed

greatly to the proficiency in Slovene language, as Aldo Klodič noted in the foreword to the third volume (Trusgnach et al. 2013, 3).

Very few of the lyrics written between 1971 and 2012 that were analysed contain any foreign (Italian) vocabulary. Lyrics with alternating Slovene and Italian language are scarce. One could argue that it is a deliberate choice to search for, learn and preserve the vocabulary of the Slovene dialect of Benečija, without the help of Italian words. This, for example, was the explicit wish and the writing principle of Viljem Černo.

The first two songs with Italian vocabulary appear in 1982; they are *Our Čelešta* (Chiabudini 1983, 139–140) and *Smooth as Down* (Kulturno društvo Rečan 1984, 150).

Regarding language, *Our Čelesta* is different: it mangles the Italian words, or rather, writes them in a Slovenised version. The letter *k* is most prominent – *kon wiski, un kappellino, konóško* – which could be seen as a response to the Italianised Slovene names in Benečija.

The protagonist Čelesta is a ridiculed character because she flirts with the urban, richer, non-Slovene world. The name itself is multifaceted: it comes from Italian (*celeste*), but it is Slovenised, and its first letter (sibilant, caron) gives away her Slovene lineage. The disapproval over Čelesta's choice (her disloyalty to the Slovene community in Benečija) becomes apparent in the humorous effects created by the alternating use of Slovene and Italian: "In my *ricoti* / I have a *fiorelino*, / and a *kapellino* / on my head; / bloody rake, / I don't *konóško* you, / I'm going in the *boško*, / but with a *dekolte*" (Kulturno društvo Rečan 1984, 139–140). There is some suggestion of prostitution, which seems attributed to the Italian element. Namely, if we assume that the lyrics are written from the paranoid-schizoid position, everything viewed as negative will be projected onto the opponent.

We may suppose, therefore, that Italian is used to criticise Čelesta's choice, her wish to leave the Slovene community (rural countryside) and enter an urban (non-Slovene) environment: "I am Čelešta, / *vestita a festa* / I carry manure / in a basket; / every Saturday / *vado a danzare*" (Kulturno društvo Rečan 1984, 139–140). As we can see, the protagonist's favouring of the foreign community is also reflected in her speech; she changes/mangles the Slovene language on the side of Italianisation: *danzare* (*plesare* in the original – the Slovene root of the verb to dance with an Italian conjugation). One cannot overlook her statement: "I don't *konóško* you" ("I don't know you"), which can be seen as a denial of her own community.

In terms of literary imagology, the character of Čelesta could be understood through the meta-image (Leerseen 2016), that is, through the home community's perception of how it is assessed by its own member who pulled away from its ideas and values. If we follow Fonda (2009), the image could be understood from the paranoid-schizoid position of the group, where an individual is forced



to identify with only one group. Fonda further explains that the separation from the group is painful and dangerous. The paranoid rule (you are either with us or against us) creates a threat of expulsion and projective identification which identifies/assimilates the other person with the enemy (Fonda 2009), attributing negative traits to him or her, as is the case with Celesta. The community's expectations of affiliation with the group can also be seen in Kekko Bergnach lyrics: "I love you, because you think like us" (Trusgnach et al. 2013, 66).

The other lyrics with Italian vocabulary, *Smooth as Down*, use a passage in Italian to describe the light-hearted life of the younger generation: "The young sing cheerfully: / 'Com' é bella questa vita, / una pizza e la partita'" (Kulturno društvo Rečan 1984, 150). The lyrics contain mild criticism of young people, who are not aware of the commodities they have in comparison to the older generation, which experienced hunger. Joyfulness and carefreeness seem foreign to the home community and inappropriate as a virtue, and are, therefore, through the use of the Italian language, projected outward onto the Other.

## 7.2 Thematic Shifts

Aside from the linguistic shifts, it is also apparent that the lyrics no longer descend into those painful corners of Benečija. Nevertheless, central themes of the past, like emigration, still reverberate: "He hasn't been away long, / and wants to come back, / he left his valleys, / his family and his heart" (Trusgnach et al. 2013, 130). And also: "I happily left you, / had to go far away, / in my mind I thought / I'd return to you" (Trusgnach et al. 2013, 90). Likewise, the nostalgia and pain over the dying villages are still present at times: "I've changed my glasses but I'm still seeing the same, / the autumn colours, the empty valleys, the crying and laughter" (Trusgnach et al. 2013, 172).

There are fresh connotations of the homeland – the Matajur mountain: "This is our homeland" (Trusgnach et al. 2013, 142). The younger generation's lyrics can deal with the dying of Benečija with slightly different, less anxious feelings: "When the week ends / I grab my tools / and prepare my car, / I quickly leave the town. / I go to see my Nan, / who lives in the field, / among flowers and valleys, / life is good. / ... / But it comes to an end, / on my way home / sadness grabs me, / my heart feels sick" (Trusgnach et al. 2000, 181).

In recent years, the festival has seen two surprising semantic shifts within the traditional topics. The lyrics with the provocative title *Don't Count on Us* probably refer to the trans-generational weight of the cultural trauma and the related hopes of the older generation that the younger generation will protect Benečija from the loss of its Slovene culture: "We're not going anywhere, / we will stay here, / we are your hope. / We're not going anywhere, / we'll fade away here, / we are your hope" (Trusgnach et al. 2013, 146). The same lyrics then use the traditional image of a root to show that the faith in the strong Slovene community



in Benečija is crumbling: “We fly up, we fall, we despair, / then our families, / the roots of Benečija, / fall apart” (Trusgnach et al. 2013, 145).

It is worth noting that collective trauma is also passed on through generations because it has been inscribed into the culture of the group (Fonda 2009) in the hope that the younger generations will process it adequately. The Senjam Festival is an example of these efforts by the older generation; and it has borne fruit in the sense that the younger generations have indeed continued striving to preserve the Slovene culture in Benečija. It is still alive in the 21<sup>st</sup> century, despite the disturbing set of circumstances in the early 1970s, which brought about the birth of the festival. Or, as the closing words to the third volume suggest: “It may be that the lyrics are not always at the highest level, but the feelings they express illustrate beautifully the situation of our Slovene nation” (S. N. 2013, 177).

We may conclude that the festival songs are the result of a unique situation and unique energy, efforts, and the desire of the community to survive. Consequently, they are immeasurably full of courage, pain, fear, and depth. Every word is a metaphor, because it utters what is forbidden, unspoken, through the images of life in Benečija. In this sense, this is poetry with a capital P.

## 8. Conclusion

The Senjam Song Festival of Benečija was born in 1971 to meet the perceived need to preserve the Slovene culture and language of Benečija, which had been severely damaged by assimilation and migration. Although it experienced a few short gaps due to financial, personnel and other issues, it celebrates its 50 years in existence this year. This article has attempted to understand the festival through literary imagology and Pavel Fonda's theory of the uncanny inner stranger, while focusing on the literary aspects of the lyrics. As well as noting their ethnographic value in describing the Slovene culture in Benečija and in preserving the dialect, the article has identified their most prevalent themes. As it turns out, in the early period of the festival, the emphasis was on the issues of assimilation and migrations. In subsequent years, the festival themes focused even more on the dire situation in Benečija: the dying villages, abandoned agricultural land, empty houses, and thus the gradual decline of Slovene culture and language in the region.

The lyrics of Senjam songs are simple in form and written in the local dialect. They are set in the region they call home – Benečija. According to their basic mood, they fall into two categories: they are either cheerful and humorous, or they are pervaded with deep pain and concern over the situation in Benečija. The writings in the festival's collection and their forewords seem to suggest that the cheerfulness is there to encourage, to bring hope as people feel catastrophic anxiety over their cultural demise. The other group of lyrics, with darker undertones, uses a particular writing technique, which merely hints at the pressures of

assimilation, conveying them through images and metaphors. One of the most famous metaphors of this kind is that of a flower: Let us plant flowers. It is a verse by Aldo Klodič, one of the main, most prolific, and most talented poets of the festival. Besides his lyrics, the analysis has also looked at the work of another important poet from Benečija, Viljem Černo. Another typical poetic image is that of a root, which has changed over time and acquired new connotations. Finally, the motif of the land is also an important element of the Senjam Festival.

Through the decades, the language of the lyrics has moved closer to Standard Slovene – this is also because of the influence of the bilingual school, which opened in Špeter in 1984. The use of Italian words as a means of creating distinct semantic effects is scarce. The analysis of the lyrics of two songs with Italian vocabulary has shown that Italian is used to denote the negative traits that the speaking subject in his or her paranoid-schizoid position projects onto the outside world (Fonda 2009). The lyrics from the most recent years of the festival still covered in the analysis (until 2012) occasionally use English words, however, their use is relatively neutral, with no hidden semantic messages. The more recent festival songs have also gone through changes in terms of their themes, but despite a certain alleviation of anxiety, they still display responsibility and commitment towards the preservation of the Slovene culture in Benečija, which the older generations have passed on – also through Senjam – to the younger ones.

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## Notes

- <sup>1</sup> The event is organised by Rečan Aldo Klodič Cultural Society (Kulturno društvo Rečan Aldo Klodič). Within the Slovene minority in Friuli Venezia Giulia there are several active cultural organisations, united in cultural associations, which are members of one of the two umbrella associations. For more on this, cf. Valentinčič 2020.
- <sup>2</sup> Fonda leans on the research by Melanie Klein (1952, cited in Fonda 2009).
- <sup>3</sup> Beneška Slovenia was part of the Republic of Venice from 1420 to the latter's dissolution in 1797, when it became part of the Habsburg Monarchy. In 1866 it became part of the Kingdom of Italy, which aimed for a one-nation state and the assimilation of its inhabitants (Kacin Wohinz & Pirjevec 2000, 17–19). In comparison to the Slovenes of the Gorizia and Trieste regions, one of the major differences in the education of the Slovenes in Benečija was the lack of local Slovene-language schools until 1984. Consequently, the Slovene clergy played a major role in spreading Slovene national ideas. Mira Cencič, among others, writes in her work *Beneška Slovenija in njeni Čedermaci* [Beneška Slovenia and its Patriotic Priests] (2008) about the clergy of Beneška Slovenia who strove for the preservation of the Slovene language, even after its use in public and in church services had been prohibited during fascism. In fiction, their struggle for the mother tongue was portrayed by France Bevk in his novel *Kaplan Martin Čedermac* [The Chaplain Martin Čedermac]. For Benečija after World War Two, and various Tricolore organisations, cf. *Mračna leta Benečije* [The Dark Years of Benečija] (Zuanella 1998) and *Pod senco Trikolore* [Under the Shadow of the Tricolore] (Petricig 1997).
- <sup>4</sup> Poetry writing in Benečija, as part of Slovene literature in Italy, is discussed by Miran Košuta (2008).
- <sup>5</sup> For Slovene literary discourse in Italy in relation to the collective trauma and emotional aspects in choosing its language code, cf. Toroš (2020; 2021) and Cergol (2021).
- <sup>6</sup> From *sciavo* or slave; the etymology of the word is also connected to the Slavs.
- <sup>7</sup> All lyrics cited here are from the first three volumes of the collection of the Senjam Song Festival of Benečija (1984, 2000, 2013). The article, and the literary excerpts in it, were fully translated by Katarina Jerin, in collaboration with the author of the article.

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Danila Zuljan Kumar

## Change in the Discursive Practices of Bilingual Speakers after Moving to a Monolingual Environment

The article analyses the speech behaviour of two speakers who were born into bilingual families, grew up in a bilingual environment in Italy, and decided as adults to move to a monolingual Slovene environment. We are interested in how the change in environment affects their discursive practises. To acquire the data, the guided conversation method and transcription of audio-recorded discourse were used, while the interactional sociolinguistic analysis method was used to analyse the discourse. The study showed that in the monolingual Slovene environment, both speakers found it difficult to adapt their speech to Slovene technical language. They also lacked the specific Slovene expressions used in everyday life. On the other hand, although their Slovene was interspersed with Italian interference, they knew variations in Slovene and were sensitive to the use of slang in standard Slovene.

**Keywords:** contact linguistics, bilingual speaker, discursive practices, choice of language, Slovene, Italian.

## Sprememba diskurzivnih praks dvojezičnih govorcev po preselitvi v enojezično okolje

*Prispevek analizira govorno vedenje govorcev, ki sta se rodila v dvojezični družini, odraščala v dvojezičnem okolju v Italiji in se kot odrasla odločila za selitev v enojezično slovensko okolje. Zanimanje nas, kako spremenjeno okolje vpliva na njune diskurzivne prakse. Pri pridobivanju podatkov je bila uporabljena metoda vodenega pogovora ter transkripcija zvočnega posnetka diskurza, pri analizi diskurza pa metoda interakcijske sociolingvistične analize. Raziskava je pokazala, da se je bilo govorcema najtežje jezikovno prilagoditi v strokovni oziroma žargonski terminologiji. Manjkalo jima je tudi poznavanje specifičnih slovenskih izrazov iz vsakdanjega življenja. Čeprav je njuna slovenščina prepletena z interferencami iz italijanščine, pa na drugi strani kažeta poznavanje zvrstnosti v slovenščini in sta občutljiva za rabo slengovskih besed v slovenskem knjižnem jeziku.*

**Ključne besede:** kontaktno jezikoslovje, dvojezični govorci, diskurzivne prakse, izbira jezika, slovenščina, italijanščina.

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## 1. Introduction

This article presents a brief study of two bilingual speakers born into bilingual Slovene-Italian and Slovene-Friulian families in Gorizia and Trieste, Friuli-Venezia Giulia, Italy, who decided to move to Slovenia near the town of Nova Gorica (in western Slovenia, on the Slovene-Italian-Friulian language border). The aim of the study was to discover how the discursive practices of the speakers in question changed after moving to a monolingual environment. This is a relatively new phenomenon, as in the past the majority of such families settled permanently in Italy (Zuljan Kumar 2009, 65–66).

In the first part of the article, the area where the interviewees live is briefly introduced from a historical and sociolinguistic point of view, the relevant theoretical background is explained, the speakers are introduced, and the methodology of data collection and analysis is described. In the second part, the factors influencing language choice and code-switching among bilingual speakers, as well as the way the interviewees themselves adapted their linguistic behaviour to the new environment, are analysed on the basis of their own statements. In the last part, syntactic interference in the speakers included in the study is discussed.

## 2. The Linguistic Situation of the Slovenes in the Western Slovene Ethnic Area. A Brief History

Today, the Slovenes living in the western Slovene ethnic area are divided between two countries, Slovenia and Italy. They inhabit the entire border area between the Canale Valley in the north and Istria in the south. Slovenes living in the Republic of Slovenia inhabit the Littoral region with the two urban centres of Koper and Nova Gorica, while Slovenes living in the Republic of Italy inhabit the provinces of Trieste, Gorizia and Udine in the Autonomous Region of Friuli Venezia Giulia. They are classified as an autochthonous historical linguistic minority, a status granted to the Slovenes living in the provinces of Trieste and Gorizia since 1954, while the Slovenes in the province of Udine had to wait for official recognition until 2001, when a new law (Law no. 38) entitled *Norme a tutela della minoranza linguistica slovena della regione Friuli-Venezia Giulia* (Regulations for the Protection of the Slovene Linguistic Minority in Friuli-Venezia Giulia) was passed in the Italian Parliament. The difference between the territories results from the different historical and political background of the Slovenes in the province of Udine, since for long centuries they lived under the rule of the Patriarch of Aquileum and the Republic of Venice. After living for a while in the same political framework, the territory of the Slavia Veneta was annexed to the Kingdom of Italy in 1866, while the Slovenes in the provinces of Trieste and Gorizia remained under the jurisdiction of the Austrian state. At the end of World War I, and after the dissolution of Austria-Hungary in 1918, the en-



tire territory of the provinces of Trieste, Udine and Gorizia, together with the present-day Slovene Littoral, was occupied by the Italian army and annexed to Italy in 1920 in accordance with the border treaty of Rapallo. Soon after the end of the war, the Italian authorities began a denationalisation policy against the Slovene population, which became systematic and cruel after the establishment of the fascist regime in 1922. After World War II, Gorizia and Trieste became part of Italy, while their outskirts became part of the Socialist Federal Republic of Yugoslavia. After World War II, according to the Paris Peace Treaties of 1947, most of the Littoral region with the upper Isonzo Valley was assigned to Yugoslavia, while Italy kept the urban centre of Gorizia. In 1954, Italy also regained the main port of Trieste. The Slovene population in the outskirts of Gorizia lost its economic centre, so in 1947, the Yugoslav authorities started building a new town on the border, Nova Gorica (Marušič 1989, 284–285; Jagodic et al. 2020, 72–74; Bajc 2020, 22–30). Located at the confluence of the Isonzo and Vipava rivers in the immediate vicinity of the state border, this town is organically linked to Gorizia economically, socially, and culturally, as well as through kinship ties. However, although the population on both sides of the border is very connected, the sociolinguistic situation of the Slovene community in Italy differs considerably from that in Slovenia. Slovenes living in Italy are predominantly bilingual and use a variety of different idioms in their everyday life; from their Littoral Slovene dialect, the spoken regional variant of the standard Slovene language, the spoken Slovene literary language, the spoken variant of the Venetian dialect of Italian, the Italian literary language, and the Italo-Slovene hybridised variant of Slovene called *itavenščina* (Grgič 2016, 62–63; Jagodic et al. 2020, 77). Slovenes on the Slovene side of the state border are predominantly monolingual and have functional knowledge of Italian. The varieties of Slovene spoken in Italy differ from those spoken in Slovenia mainly in the number of interferences with Italian at all linguistic levels (cf. Jagodic et al. 2020, 70, 78–82; Grgič 2016, 61–62), as the members of the Slovene minority in Italy have daily contact with the Italian language, while this is not the case for the Slovenes living on the Slovene side of the border.

### 3. Theoretical Framework

From a sociolinguistic point of view, bilingualism can be defined as the result of intensive language contact (i.e., contact between people who speak different languages) either at the individual level (individual or family bilingualism) or at the group level (societal bilingualism). In psychology, the term refers to the coexistence of two language systems within an individual, as opposed to monolingualism. A bilingual is anyone who is actively proficient in two languages to some degree. However, bilinguals are rarely equally proficient or balanced in their use of the two languages, making one the more dominant (Hakuta 2009,

173; Wierzbicka 2010, 94–95; Grgič 2019a, 40). When discussing bilingualism, three types of bilingual speakers are distinguished, namely compound, coordinate, and sub-coordinate. A compound bilingual is a person who learns two languages in the same environment so that they acquire a concept with two verbal expressions. A coordinate bilingual acquires the two languages in different contexts (e.g., at home and at school), so that the words of the two languages belong to separate and independent systems. In a sub-coordinate bilingual, one language dominates (Diller 1970, 254–256). The article discusses the example of two compound bilinguals who learned Slovene in their primary and secondary education and in whose primary family two languages were spoken, Slovene and Italian.

There are many studies dealing with different aspects of the language use of Slovene bilingual speakers in Italy who come from either Slovene or linguistically mixed families and whose discursive practices include both Slovene and Italian language versions. I mention only a few here. Mezgec (2012), Pertot (2014) Grgič (2016; 2017; 2019a; 2019b) and Bogatec et al. (2020) focus on the communicative competence of Slovenes in Italy, Jagodic (2011) presents language use patterns in different age generations of Slovenes in Italy, Mezgec (2013) discusses the functional literacy of young speakers of the Slovene language, and Vidau (2015) and Brezigar & Vidau (2021) focus on the intercultural position of young Slovenes in Italy. However, the aim of the present study is to shed light on the problems in the language use of two bilingual speakers who grew up in a bilingual environment and decided to move to a monolingual Slovene environment as adults. We are interested in how the change in environment affected their discursive practices.

#### 4. Presentation of the Speakers and the Methodology of Data Collection and Analysis

The study focuses on the following questions: 1. What were the discursive practices like in the interviewees' childhood families and what are they like in their current families? 2. How do the speakers adapt their choice of language to different speech situations? 3. How has their speech behaviour changed since moving to a monolingual Slovene environment?

For data collection, I used the guided conversation method by making an audio recording and a subsequent transcription. To analyse the discourse, I used the method of interactional sociolinguistic analysis, in the sense that I directed the questions to a sociolinguistic (self-)observation of each bilingual speaker and their use of the discursive practises they had developed in the new living environment (change in linguistic behaviour depending on the speech situation, interlocutor(s), discourse topic, etc.).

The first speaker (hereafter S1) is from the vicinity of Gorizia, Italy. He completed all his education from kindergarten to high school in Slovene in Gorizia. He is employed as an accountant at a Slovene institution in Gorizia, Italy. His father is Slovene by birth and comes from Slavia Friulana, Italy; his mother is Friulian. They spoke Italian within the family, and S1 and his father spoke Slovene in the company of other Slovenes. S1's wife is Slovene and comes from Nova Gorica; they have two daughters and live near Nova Gorica. His wife is a teacher, and although she speaks Italian, they speak Slovene at home among themselves and with their daughters. The daughters attend elementary school in Slovenia and speak Slovene to all of their paternal relatives except their grandmother, with whom they speak Italian.

The following excerpt shows how communication took place in S1's family when he was a child and what determines his choice of language when he speaks to his father.<sup>1</sup>

[1]

I: [...] do you speak Italian or Friulian with your mother?<sup>2</sup>

S1: Italian.

I: And Slovene with your father?

S1: Italian with my father, too. Italian if we're alone, Slovene if we're in a Slovene group.

I: Which factors influence whether you speak Slovene with your father?

S1: We always spoke Italian with my mother at home. Italian with my father, too. We spoke only Italian at the dinner table because if I had said, *mama, daj mi en kos kruha* ('Mother, give me a piece of bread'), I wouldn't have got anything (laughs), *allora* we had to speak Italian.

I: And with your father?

S1: With my father, too, [...] we spoke Italian, you get used to it, I guess, and then it's hard to switch. *Però*, if my father was here (in the company of Slovene speakers), we would be speaking Slovene.

The second speaker (hereafter S2) was born in Trieste, where he completed his entire education from kindergarten to high school in Slovene, except for an Italian-language music conservatoire in Trieste. He is employed as a music teacher in Nova Gorica. Both his parents are Slovene and live in Trieste. At home, he spoke Italian with his mother and Slovene with his father. His wife is Italian and comes from Gorizia; she did not speak Slovene before their marriage but has learned it well since. Like her husband, she works as a music teacher in Slovenia. They live in Slovenia, 15 km from Nova Gorica, and they communicate with each other in Slovene, while they each speak their mother tongue with their four children. All the children attended kindergarten and the first six grades of primary school in Slovenia, then secondary school with Slovene as the language of instruction (corresponding to the second triad of primary school in Slovenia) in Gorizia (Italy); the eldest two now attend high school with Slovene as the language of instruction in Italy.

In the following text excerpt, S2 discusses how communication took place in his childhood family and why he and his wife started speaking Slovene at home despite the fact that even he finds it easier to express himself in Italian [2].

[2]

S2: I speak Italian with my mother and Slovene with my father because that's what they decided, because they lived in Trieste, my mother would speak Italian and my father Slovene.

I: How do they talk to each other?

S2: With each other, they only speak the dialect. My parents speak only Italian with each other, or rather the dialect, [*triestin*], of Trieste ...

I: How did you start speaking Slovene with your wife?

S2: I said, [*bašta*], enough, I'm tired of always speaking Italian, [...] because I realised that, since I'm an Italian Slovene, it all depends on the environment I'm in. If I'm in an Italian environment, I'm more fluent in Italian, and my Slovene is already a little behind. And vice versa, if you're in a Slovene environment, you're more fluent in Slovene. I personally find Italian much easier, for example.

Thus, S1's childhood family used mostly Italian for everyday communication, and his current family uses mostly Slovene. In S2's case, both languages had equal shares in his childhood family, and the same goes for his own family. Unlike his childhood family, where his parents spoke the Italian dialect with each other, S2 and his wife mostly speak Slovene, which was a mutual decision, even though communicating in Italian would be easier for both. At this point, we can observe that both speakers, who lived in Italy and now live in Slovenia in completely comparable environments (Slovene-Italian (Friulian) family), actually use different discursive practices, thus, I am further interested in what affects the choice of a particular language in individual speech situations.

## 5. Factors in Language Choice with Bilingual Speakers

With bilingual speakers, the choice of one language or the other in a given speech situation depends on several factors (Weinreich 1979, 4; Thomason 2008, 47; Matras 2009, 234–247), namely:

1. on the individual's ability to express themselves orally and in writing (linguistic competence);
2. the relative familiarity with the two contact languages, i.e., the ability of phonetic distinction, of accepting a different accent, of adapting to the orthography of the other language, etc.;
3. the attachment of a language to a person or speech situation;
4. the speaker's familiarity with the variations of each language;
5. their attitude toward each language in contact.

In the following section, text excerpts from the conversation are used to illustrate how individual factors influence S2's and S1's choice of language.

## 5.1 The Individual's Linguistic Competence

Both interviewees believe that the choice of one language or the other does not depend so much on the speaker's general linguistic competence, but rather on his or her communicative competence,<sup>3</sup> i.e., in which area of life it is easier for the speaker to think in one language or the other. Therefore, I first directed my questions to an area in which an adult's thinking and utterances are rather mechanical and automated and do not require much mental effort, namely arithmetic (example [3]). Following that, I was interested in which language the speakers use to respond in an emotional and uncontrolled way (example [4]).

[3]

*I:* How do you do multiplication?

*S1:* In your mind, how do you calculate when you're alone?

*S2:* Since I've been told you usually count in your mother tongue; I try to do it in both languages.

*I:* Let's say you don't think about it.

*S2:* Let's say if the calculation is five times six, in Slovene, because that's how I learned multiplication. Otherwise, it depends on the context. If the work context is Slovene, I calculate in Slovene. If it's an Italian context, in Italian.

*I:* So, it also depends on the person you're with, or the environment?

*S2:* I think it's both.

Example [3] shows that for S2 arithmetic depends on the language of the environment he is in, although he always performs multiplication in Slovene because he learned it in that language. It is also noteworthy that since he was told that arithmetic is usually done in a person's native language, he tries to perform it in Italian as well, which means that he continues to strive for a balance between the two languages in his new environment (i.e., he does not want his Slovene to predominate). S1, on the other hand, calculates only in Italian in all speech situations and indicates that his Slovene colleagues from Italy do the same because, as he says, "I am done calculating before I can turn the numbers around in Slovene".<sup>4</sup>

Studies show that the use of internal speech, that is, speech in which mental calculation takes place (as well as prayers, dreams, and memories) in a bilingual speaker depends on their fluency in the other language (Pertot 2014, 17, 18). As the example shows, the inner speech of the two speakers in question takes place in different languages, in S1 exclusively in Italian, and in S2 it depends on the speech situation, which could mean that in S1's case perhaps the dominance of Italian in the family environment had a decisive influence on the dominance of Italian in his inner speech.

Example [4], on the other hand, shows that both speakers unconsciously use Italian swear words, partly because Slovene is not, in their opinion, as expressive as Italian in this area. But another reason is certainly that they both used Italian as their first language before moving to Slovenia, which is also shown in uncontrolled, unpredictable, emotional reactions when, to use S1's words, he always instinctively expresses himself in Italian. In a way, their reactions confirm a finding from several studies (see Pertot 2014), namely that speakers can express intense emotions much more easily in their first or most frequently used language (Pertot 2014, 16).

[4]

I: [...] how do you swear?

W2: What does that mean?

S1: *Bestemia*.

S2: Haha, *dio can* 'god dog', *cavoli*<sup>5</sup>, *porka vacca* 'damn cow' [...]. Well, Slovenes don't have a diverse repertoire of these ...

S1: *Vaffanculo* 'fuck off'. If I get really angry, it comes out in Italian, I mean, the [*inštintivo*]<sup>6</sup> that comes out directly.

## 5.2 The Individual's Relative Familiarity with Both Languages in Contact, Which Includes the Ability of Phonetic Distinction [5], of Accepting a Different Accent [6], of Adapting to the Orthography of the Other Language etc.

The following excerpts from the interview with the informants illustrate well how both had problems with the transition from a bilingual environment in Italy to a predominantly monolingual environment in Slovenia, in terms of phonetic distinction in the pronunciation of Slovene and Italian words and the distinction between word accents in Slovene and Italian. In a bilingual environment, numerous borrowings of words and mixing between languages are normal; in a monolingual environment, this is immediately noticeable (despite the many borrowings) and triggers a reaction from monolingual speakers (e.g., laughter), as can be seen in example [5], where S1 describes how, for example, Slovenes in Italy often elide the *h* sound, which is interference from Italian (as in the word *herpes* 'herpes'); in a monolingual environment, this caused his Slovene friends to burst out laughing.

[5]

S1: [...] *allora* Italians don't use *h*, right. *Allora*, if I say you have *erpes*, like in Italian, right, ho ho ho, [...] but then you learn, now I say *herpes* too.



S2 once made his Slovene friends laugh when he stressed the word *piknik* 'picnic' like in Italian (on the final syllable), without even knowing what provoked the laughter.

[6]

S2: I remember how I conducted the school orchestra and I said, boys, next week we're organising a *piknik* for the end of the school year, and they all burst out laughing [...].

### 5.3 Language Bound to a Person or Speech Situation

Tying language to a person is one of the most important factors that influences the choice of language in a bilingual person's communication, mainly because it is linked to the emotional dimension (Padilla & Borsato 2010, 12–13), as shown in example [7], where S2 explains that he once tried to speak Slovene with his mother, with whom he exclusively speaks Italian.<sup>7</sup> This proved hard or even impossible. Moreover, S2 emphasises that when speaking about important life events, which concern your emotions, you always speak in the language closest to you. This assertion again confirms the above finding that a bilingual speaker can express themselves semantically most accurately and with the most appropriate choice of words in emotional moments only in the language of their emotional closeness and intimacy.<sup>8</sup>

[7]

S2: I did an experiment, I managed to speak Slovene with my mother two years ago, but it's difficult, you know, you feel like you're going against nature [...]. You have to force yourself. I had to think: I'm Slovene, my mother is Slovene, right, and we have to speak Slovene.

I: How did you tell your mother your wife was pregnant?

S2: Always in Italian. When it's intimate, about matters of the heart, you always switch to the language closest to you.

### 5.4 The Speaker's Familiarity with the Variations of the Individual Languages

In the following excerpt, S1 describes how he is bothered by the fact that in the monolingual Slovene environment the use of borrowed slang words has expanded to formal speech situations (such as work) (e.g., *fotka* vs. *slika* 'photo'), while certain Slovene words that he and the bilingual environment he grew up in use are marked as archaic (e.g., *gumica* for std. Sln. *radirka* 'eraser') or are not known at all in the Slovene environment (e.g., *lesenka* for std. Sln. *barvica* 'crayon'). In this way, S1 has actually demonstrated greater language sensitivity and loyalty

to the language than monolingual Slovene speakers who uncontrollably adopt foreign slang words into formal discourse. However, in order not to be laughed at by his interlocutors, S1 adapted and started using such words himself.

[8]

I: [S1], the other day you told me that since you've come to Slovenia, you no longer say *stisnit*, but *sprintat*.

S1: Yes, yes, I was used to it before, it was *stampare*, *stisnit*. [...] *però*, when we were in school, it was *stisnit*, right. She (S1's wife) has laughed many times at some of our words, saying they're from the stone age, *però*, we use them. [...] But they're Slovene words, right, because afterwards I go check that JKSZ (laughs), what's the dictionary called ...

S2: SSKJ.<sup>9</sup> (laughs)

S1: And it's in there, right, it's a normal Slovene word, not archaic, you people just don't use it.

Although the speaker is mistaken and the word *stisniti* is not appropriate for the meaning 'to be printed' in the standard Slovene language, the word *natisniti* is semantically appropriate, he nevertheless clearly shows a sensitivity to language use and is aware of the interference in language variation (slang words in the standard language), which bothers him. At the same time, he keeps switching from Slovene to Italian and vice versa, even within utterances, which he is not aware of. The following section therefore provides an overview of how the mechanisms of language switching work and what triggers the switch in the speakers included in the study. In addition, conversational excerpts are used to illustrate the final factor in the choice of one language or another in a given speech situation, namely, the speaker's attitude toward each language.

## 6. Language Switching

This term refers to the alternating use of two or more languages within the same discourse or the parallel placement of utterances belonging to two different grammatical systems within the same discourse (Gumperz 1992, 81; Treffers-Daller 2009, 58). It is particularly common in spontaneous conversations between two or more bilingual or multilingual speakers in multilingual communities or individual families. The switching can take different forms; the speaker may make the switch with a single word or phrase, with an utterance, or with a whole sequence of utterances. There are several reasons that lead to language-switching; the following list is based on Heine & Kuteva (2008, 59), Crystal (2006, 414), and Gumperz (1992, 63):

1. to express solidarity or respect with a particular social group;
2. to exclude others from the conversation;

3. to produce a specific effect;
4. to compensate for the speaker's lower linguistic competence in the other language.

## 6.1 The Expression of Solidarity or Respect

An example of the speaker's language switch in the function of expressing solidarity with or respect for a particular social, ethnic, linguistic, or other community would be the Pope's annual Easter greetings in over 150 different languages of the world.

## 6.2 The Exclusion of Others from the Conversation

Bilingual or multilingual speakers switch to another language when they wish to exclude others from the conversation or do not want to be understood. An example of this are the children of S2 who switch to Italian when they do not want to be understood by their monolingual Slovene classmates.

## 6.3 The Production of a Specific Effect

For a bilingual speaker, there are meanings that cannot be expressed equally well in both codes (Wierzbicka 2010, 102). In this sense, the switch to language B may, according to the speaker, have the function of conveying semantically more relevant information than would be the case in language A, e.g., in order to achieve a certain effect, as S2 says in the following text excerpt.

[9]

S2: I don't know. [...] it can happen that in the given moment it's easier to express yourself in one language than in the other, it does happen, and among Slovenes living in Italy you can talk 70 percent in Slovene and then you want to say one sentence in a particular way, and you say it in Italian.

I: Do you think that sentence that you want to say in Italian conveys more?

S2: You create a different atmosphere because it's probably linked to specific experiences and events, or it's linked [...] to a specific writer, to a film or something that you experience in a different way, *allora* you prefer to connect with those words in that language.

## 6.4 Compensation for the Speaker's Lower Linguistic Competence in the Other Language

The speaker is unable to express themselves in language A, so they switch to language B. In this case, the language switch is a strategy that the speaker uses to compensate for their lower linguistic competence in language A, as example

[10] shows. Another example comes from the Slovene Littoral. Sociolinguistic research conducted by Todorović (2021, 118) among Italian-speaking Istrians, wherein it was shown that some speakers in contact with Slovene monolingual speakers prepare for conversations in advance. One of the interviewees explained that her personal doctor does not speak Italian, so she gets acquainted with the appropriate terms for the symptoms before the examination.

The interlocutors were left alone for a moment and their conversation turned to the technical language of mobile telephony. S1 had heard Vodafone had a special offer worth considering. Since they are better acquainted with the technical terminology of the field in question in Italian, and also because the absence of other conversation participants (a change in the speech situation) meant they were able to open the door to interference from Italian (they had controlled their speech when the interviewer had been present), a significant change in their speech behaviour can be observed. They began language mixing.<sup>10</sup> Slovene was still the predominant language of communication but it was interspersed with:

1. switches to Italian, such as, you pay *ventinove euro fisso* a month and you get eight hundred minutes of calls, four hundred *messaggi* and ten [*džiga*] in *traffico* internet, [*speciale*] I think,
2. Italian lexical and syntactic interference, such as, one [*opcion*], I'll need two [*telefonini*]; *pustmo stat messaggi* 'let's put aside messaggi'.<sup>11</sup>

[10]

S1: Allora, I'll switch to *Tre*, cioè, I'd like to switch to *tre*, *praticamente*, right, because now there's an [*opcion*] 'option', special, cioè, eight hundred minutes of calls [...].

S2: How much?

S1: *Ventinove euro*, you pay *ventinove euro fisso* a month and you get eight hundred minutes of calls, four hundred *messaggi* and ten [*džiga*]<sup>12</sup> in *traffico* internet, [*speciale*]<sup>13</sup> I think, does Vodafone have something like that? You keep track of such things.

S2: I remember, I was checking out *Tre*, cioè, if they have any *offerta*.

S1: Now they have only *tre* power, [...] otherwise, the same thing costs *quarantanove euro* [...] For me it's [*figada*], cioè, cioè ... I made a *calcolo*, let's put aside internet, let's put aside *messaggi*, which I don't write, *però*, if you make a calculation, right, you make, e, *ottocento minuti* o *per venti nove euro diviso ottocento minuti*, I get that it costs me seven cents a minute [...].

According to our interlocutors, however, the reason for switching is not always lower linguistic competence, but that something can be expressed better in the other language. Thus, the reason why a bilingual speaker switches from one language to another is often because the meaning they want to express "belongs" in the other language (Wierzbicka 2010, 102). For S1, Italian metaphorical language is closer to him than its Slovene counterpart. He illustrates this with the example of sports, where, he says, the Italian commentator uses very expressive phrases that he thinks Slovene lacks.

[11]

S1: [...] for example, Moto [*dži pi*], right, [...] I mean, Guido Meda, [...] has a flair for words, [...] Franco Bulatto *dietro* [*a žverničato*]<sup>14</sup>, he uses expressions that are not even comprehensible in Slovene, [*žverničare*] means strip off paint, right. *Allora* [...] that means that he passed by so close that he stripped his paint off, see? *Però*, how are you going to say something like that in Slovene? When you're done with the sentence, the race is already over, right. (laughs) No, I think Italian has a lot of expressions where one word can convey a concept when Slovene requires a whole essay, right.

In this case, S1 feels that the Slovene word for driving very close to another motorist is not the exact semantic and metaphorical equivalent of the Italian word, so he feels that the Italian word is irreplaceable here. In other words, he feels that the Slovene word does not fit his perception of the situation. For him, the Italian expression [*žverničare*] has greater emotional power because of its meaning, and the Slovene equivalent would fall short in its emotional intensity. S2 agrees, but then also cites example [12], that illustrates a lack of Italian lexical equivalents to the Slovene words. In his opinion, there are indeed differences between the two languages in their expressiveness, but in one area, Italian is more expressive or semantically precise, and in another Slovene.

[12]

S2: Sometimes Slovene has more words for something. For example, you have five, six words for different kinds of ice, right, while in Italian you only have *ghiaccio*. It's *ghiaccio compresso*, *ghiaccio così*, but it's always *ghiaccio*, you don't have any other word, you see?

The two examples show that not only do both speakers speak two languages, but they also live their lives in both languages, unconsciously observing and comparing the lexical and grammatical repertoire of both of them and, when they deem it necessary, using the most appropriate expression from one or the other language in a bilingual speech situation to express the most appropriate semantic meaning they want to convey.

As mentioned at the beginning, both speakers have chosen to live in the Slovene-speaking environment of the suburbs of Nova Gorica. S2 has lived there for twenty years and S1 for sixteen years. Next, I was interested in the areas of life in which they found linguistic adaptation most difficult. Both emphasised that certain expressions from daily life were the most problematic at first, such as the Slovene expression for the remedy to remove limescale. S2 tells how he went to the shop to buy it and only knew the Italian expression *anticalcare*. This response in some way confirms the finding of Grgič, who points out that 80 per cent of students who complete eight years of schooling in Slovene do not know Slovene terms for everyday things such as cotton candy, shower soap, and croissant, "even though they can write an essay about the French Revolution correctly" (Grgič 2019a, 135–135).

Another area that caused the interviewees problems was jargon terminology belonging to various areas of life, e.g., car parts or tools, which confirms the statement by Jagodic et al. (2020, 81) statement that Slovene speakers in Italy lack knowledge of specific (especially professional) Slovene vocabulary.

[13]

S1: I was more fluent in Italian than in Slovene terminology, because on that side of the border, if you like, technical terminology is Italian, [...] you won't hear any boy say, I've cleaned the *uplinjač*,<sup>15</sup> I've cleaned the [*karburator*],<sup>16</sup> [...] (laughs), I've changed the [*kandele*],<sup>17</sup> I've changed the spark plugs.

S2: You know what the biggest problem is? When I had to go to a Slovene hardware shop, I didn't know what to ask for. Can you give me a *cacciavite*? Can you give me what?

S1: It's a problem because we still use colloquial terms. Do you have a [*šraufencinifer*] 'screwdriver'?

S2: Yes, I didn't know the word, I didn't know how to translate it, how to say *cacciavite* in Slovene.

S1: There's also [*bulon*].<sup>18</sup>

S2: [*bulon*], too.

Based on the textual examples, we can see that the speakers are affected by lexical interference and constantly switch between the two languages. However, from the point of view of language contact, the interference at the syntactic level, which is not apparent at first sight in the language, is the most interesting, which is why the last part of the article focuses on such interference in the language use of the speakers included in the study and in their families.

## 7. Syntactic Interference with the Speakers Included in the Study

Syntactic interference (or in this case syntactic calque) is a phenomenon in which a syntactic structure in language B, or more precisely in a subsystem of language B, deviates from the norm of language B (or is absent altogether in language B) but is found in the contact language (language A or one of the systems or subsystems of language A) (Heine & Kuteva 2008, 58; Matras 2009, 234–237; Zuljan Kumar 2022, 149–150, 153–159).

Here are a few examples from the conversation with the bilingual speakers in question:

[14]

S2: [...] all these expressions that you also have [...] here in the Littoral, there's expressions [...] such as *brez družga* [...].

W2: *Senz'altro*.



S2: It's a direct translation of *senz' altro*.

W2: And there's *za* + infinitive. I know it isn't OK, but if everyone says it, I say it too now, I know that it's wrong, *oppure* this, *je brat od Andreja* ('he is the brother of Andrej'). It isn't OK, right, but if everyone says it ... (laughs).

In example [14], S2 and his wife point out the calqued structures *brez drugega* '\*without other (i.e., surely)', *za* + infinitive 'for + infinitive' and *od* 'of' + noun phrase, which are the predominant means of expressing manner (*brez drugega*), intention (the preposition *za* + infinitive) and possession (the preposition *od* + noun phrase). These language patterns have prevailed over the Slovene structures *vsekakor* (*bi*), *ne da bi* + infinitive and the expression of possession with possessive pronouns in the corresponding meanings. S2's wife, who learned standard Slovene in a language course, is aware of this calquing but uses these structures herself because she identifies with the community that uses them and in order to adapt to the environment in which she lives.

[15]

S1: [...] in Slovene it's *se blešči* ('\*it's glimmering itself (i.e., it's shining)'), right [...]. I've corrected it so many times<sup>19</sup> [...] o, *come si brilla questo*, in Italian *come brilla*, right [...]

I: Does this mean the children think in Slovene and translate to Italian?

W2: E, yes...

S2: *Ci prepariamoci*, said [my son] once, you say *prepariamoci* or *ci prepariamo*.

W2: *Oppure, aspetta, aspetta, un'altra*, I can't remember [...] *Aiuta a la mamma* ('\*help to your mother'). In Italian it's *aiuta la mamma*, help your mother [...] Or vice-versa, such as *za vidit*, in Italian it's *andiamo a vedere*, in Slovene *grema za videt* ('\*let's go to see'), that's not OK, right?

In example [15], S2 and his wife report on Slovene linguistic interference in the Italian of their children, who spend most of their time in a Slovene-speaking environment. Language switching is bidirectional in S2's family, suggesting that the two languages he is in contact with are indeed equal, whereas it is much less frequent in the other family because of the exclusive use of Slovene.

## 8. Conclusion

The study showed that although both speakers had highly developed language competence in both languages, the predominant language in their childhood families was Italian. They were aware of this and decided to change their established discursive practices by moving to a monolingual Slovene environment. When they moved to Slovenia, they encountered language problems in terms of being unfamiliar with Slovene jargon terminology in the new environment and using Slovene words that the monolingual environment rejected as archaic.

The speakers also had problems at the level of pronunciation (i.e., the phonetic distinction between languages in contact), pronouncing some Slovene words in an Italian way, and at the level of accent, stressing Slovene words in an Italian way, which triggered laughter in the monolingual environment. Although the speakers constantly switch between languages, even within utterances, they are sensitive to the transfer of slang words into standard Slovene, indicating a loyalty to Slovene that they believe is stronger than with monolingual Slovene speakers, a fact that disturbed S1. Both speakers, as well as S2's wife, who is a native Italian, are aware of interference at the syntactic level, but still use such structures because it is normal in the community they moved to, indicating their loyalty to the speech habits of the new environment.

Although both speakers lived in Italy and now live in Slovenia in a similar environment, their families use different discursive practices based on decisions between spouses: While in S1's family, Slovene is consciously predominant, unlike in his childhood family where Italian was predominantly used, S2's family repeats the pattern from his childhood family by using both languages equally. Despite this difference, the linguistic behaviour of the two speakers when speaking to each other maintained their predominant discursive practice, i.e., switching between languages depending on which language they consider most appropriate at a given moment to express the intended message. They have (unconsciously) maintained this linguistic behaviour, although they both consciously use Slovene as the language of everyday communication in their new language environment.

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## Notes

- <sup>1</sup> The abbreviations used for speech roles are: I – interviewer, S1 – first speaker, S2 – second speaker, W2 – S2's wife.
- <sup>2</sup> The examples have been translated into English. To improve readability, language switches to standard Italian (std. It.) are written in italics. Language switches to the Gorizia and Trieste versions of the Venetian dialect (Gor. and Tr. Ven.) are cited in square brackets, e.g., Gor. and Tr. Ven. [šfigada] vs. std. It. *sfiga* 'bad luck'; the same applies to acronyms spelled by speakers in the Italian way, such as moto GP [dži pi]. Square brackets are also used to quote loan words in the Slovene version spoken in the Gorizia region of Italy (Gor. Sln.), such as [inštintivo].
- <sup>3</sup> Communicative competence is a learned skill that a speaker acquires through socialization in a particular language, and it includes forms and ways of communicating, i.e., practices that a speaker uses in particular circumstances and domains (Grgič 2019a, 128).
- <sup>4</sup> S1 is referring to the inverted order in the pronunciation of the ones and tens digits in Slovene.
- <sup>5</sup> Compare *Non mi importa un cavolo* 'I don't give a \*cabbage (damn)'.
- <sup>6</sup> A borrowing from Gor. and Tr. Ven. that is used in Gor. and Tr. colloquial Sln., but not in the regional colloquial variant of Slovene in Slovenia; it means 'instinctively'.
- <sup>7</sup> His mother finds it easier to communicate in Italian than in Slovene because as a child she was torn from her Slovene environment during the war and deported to Germany. As a result, she forgot her mother tongue. She was not able to develop it when she should have, and instead she fostered her knowledge of Italian and German. Now she tries to speak Slovene, but she is unable to do so when it comes to intimate topics.
- <sup>8</sup> This is also confirmed by Todorović (2021, 114), who notes that many speakers of the Italian dialect with whom she conducted several interviews had no real need to learn the standard language. One of the interviewees explicitly pointed out that she would feel uncomfortable if she wanted to speak differently than she was used to, which is in her native dialect.
- <sup>9</sup> Slovar slovenskega knjižnega jezika (Dictionary of Standard Slovene Language).
- <sup>10</sup> Here I use the term language mixing to mean using two languages as if they were a single language. In contrast to conscious language switching, speakers do this unconsciously when they mix codes.
- <sup>11</sup> A calque from *lasciamo stare i messaggi*.
- <sup>12</sup> Italian version of the word *gig* (abyte).
- <sup>13</sup> Borrowing in Gor. and Tr. Sln.
- <sup>14</sup> Gor. and Tr. Ven. 'strip off paint', std. It. *verniciare*.
- <sup>15</sup> Std. Sln. expression for 'carburettor'.
- <sup>16</sup> Borrowing in Gor. and Tr. Sln., std. It. *carburatore*.
- <sup>17</sup> Borrowing in Gor. and Tr. Sln.

<sup>18</sup> Borrowing in Gor. and Tr. Sln., Friulian *bulòn*, std. It. *bullone* 'bolt'.

<sup>19</sup> She has corrected her children when they speak Italian because they use the reflexive form of a verb which is a calque from Slovene.

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Karolina Lendák-Kabók

## Intermarriage-born Millennials in the Whirlwind of the 1990s Yugoslav Wars

The goal of this paper is to investigate the role of family choices regarding the language of education in self-representations in the adult life of millennials, who grew up during the 1990s Yugoslav wars in Vojvodina. Although the armed conflicts of the 1990s Yugoslav wars avoided Vojvodina, the war had a profound effect on the region. For intermarriage-born millennials, one of the milestone events in their lives is their parents' choice of language of instruction when enrolling them in elementary school. The paper is based on an in-depth analysis of interviews conducted with millennials born in Serb-Hungarian intermarriage. The findings show the influence the choice of language of school instruction has on the millennials' identity and sense of belonging. Those who attended minority language tuition endured more ethnicity-based, nationalism-fuelled incidents during their schooling. This topic is important, since the experiences of intermarriage-born millennials in Vojvodina had previously been neglected because of the focus on Serb-Croatian-Bosnian relationships in conflict literature.

**Keywords:** intermarriage, education, language, 1990s Yugoslav war, ethnicity, identity, millennials, Vojvodina, Serbia.

## Otroci mešanih zakonov sredi vojne vihre na območju Jugoslavije v devetdesetih letih prejšnjega stoletja

*Prispevek proučuje vpliv izbire učnega jezika na samoopredelitev v odrasli dobi v primeru otrok, ki so odraščali v Vojvodini v času jugoslovanskih vojn v devetdesetih letih prejšnjega stoletja. Čeprav so neposredni oboroženi spopadi Vojvodino obšli, je vojna tudi to regijo močno zaznamovala. Za otroke, rojene v mešanih zakonih, je ena od življenjskih prelomnic tudi izbira učnega jezika ob vpisu v osnovno šolo. Članek temelji na poglobljeni analizi intervjujev, opravljenih z otroki, rojenimi v mešanih srbsko-madžarskih zakonih. Ugotovitve kažejo pomemben vpliv izbire učnega jezika v šoli na njihovo identiteto in občutek pripadnosti. Tisti, ki so obiskovali pouk v manjšinskem jeziku, so med šolanjem doživeli več incidentov, povezanih z etnično pripadnostjo in nacionalizmom. Tematika je vsekakor zanimiva, saj izkušnje vojvodinskih otrok iz mešanih zakonov doslej niso bile deležne večje pozornosti v strokovni literaturi, ki se je osredotočala predvsem na srbsko-hrvaško-bosanske odnose.*

**Ključne besede:** mešani zakon, izobraževanje, jezik, jugoslovanska vojna v devetdesetih letih prejšnjega stoletja, etničnost, identiteta, otroci, Vojvodina, Srbija.

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## 1. Introduction

Although during the 1990s Yugoslav wars there were no armed conflicts in the Autonomous Province of Vojvodina (hereinafter, Vojvodina), the northern part of Serbia, the war still had consequences (Nađ 2006). Vojvodina is not a territorial autonomy on ethnic grounds, but a multi-ethnic region (Székely & Horváth 2014) with 25 different ethnicities,<sup>1</sup> among which the Hungarian ethnic minority is the largest and constitutes 13 per cent of the Vojvodinian population (Statistical Office of the Republic of Serbia 2012). During the wars in the 1990s, the living conditions of the Hungarians in Vojvodina changed significantly (Göncz 2004), since the 1990s were permeated by ethnic conflicts and the outbreak of hatred and hostility towards national minorities, or towards all those who differed from the majority nation (Savić 2006). These circumstances decreased the population of the ethnic minority communities due to large-scale emigration (Gábrity-Molnár 1997; Vékás 2008). Everybody had to cope with difficult economic and ever-changing social and political circumstances that were exacerbated by and associated with their minority fate and vulnerability (Göncz 2004). The number of Hungarians in Vojvodina decreased rapidly (Gábrity-Molnár 1997; Göncz 2004; Vékás 2008); by May 1992, 25,000 Hungarians had fled to Hungary, who were later legally deprived of their inheritance rights for avoiding military conscriptions. Many who stayed and refused to serve were dismissed from their jobs (Vékás 2008, 356).

Acculturation can be seen as an important concept in explaining the varied experiences of ethnic and cultural minorities (Trimble 2003, 5), which may involve the loss of some components of the ethnic minority identity in public relations, i.e., language loss, changing social networks, or evolving cultural values (Phinney 2003). Acculturation was always more prominent in intermarriage-born children. Moreover, those who were born in intermarriages and had mixed national identities found it challenging to decide whether to belong to an ethnic minority group or the majority during the turbulent time of the 1990s, as it became onerous to be a member of any ethnic minority community (Göncz 2004). Although Botev (1994) argued that the high level of intermarriages (between 1962–1989 the percentage of intermarriages in Vojvodina varied between 22.5 %–28.4 %, while in Kosovo it varied between 9.4 %–4.7 % in the same period) saved the province from the escalation of armed conflicts, the idea of intermarriage as a panacea for social harmony and cohesion may be overly simplistic (Rodríguez-García et al. 2016, 2), especially if they become weaponized and regarded as eroding forces attacking ethnic boundaries (Burić 2020).

Earlier studies on ethnic intermarriages in Vojvodina were based on publicly available statistical data analyses (cf. Petrović 1968; 1985; Botev 1994; Smits 2010; Sokolovska 2008; Lazar & Aćimov 2017), while scant attention was paid to ethnic-intermarriage-born individuals from a qualitative perspective

(Özateşler-Ülkücan 2020). To understand this phenomenon of heteroethnic millennials we need to adopt Hobsbawm's (2012, 10) approach<sup>2</sup> of analysing the nations and their constructions from above, i.e., in terms of political, technical, administrative, economic and other conditions; and from below by voicing individuals' assumptions and interests.

The paper presents the complex decision-making process that intermarried parents faced upon choosing their children's language of instruction at school (minority or majority). The stories were narrated from the perspective of intermarriage millennials (born in the 1980s) revealing breakpoints, much like the language of instruction. Millennials in post-socialist countries in Europe are in a particularly vulnerable, precarious position, as the transition from socialism to neo-liberalism has revived class, gender, and ethnic social differences (Ule 2012, 40). Additionally, the research focuses on the investigation of ethnicity-based discrimination and incidents which intermarriage-born millennials endured in their childhood and schooling during the 1990s Yugoslav wars. The analysis was based on semi-structured interviews with individuals from different parts of Vojvodina with either majority- or minority-dominant populations.

The research is unique in two aspects. Firstly, it offers an insight into the Serb-Hungarian relationship during the 1990s war through the lens of the historical overview of political and social events, which serves to shift the focus from the literature that looks at Serb-Croat-Bosnian ethnic relations, but also to add a new dimension to it. Thus, the questions this paper ought to answer is: to what extent do intermarriage-born millennials preserve their ethnic minority identity components (ethnic minority language use) and did the language of school instruction induce any ethnicity-based atrocities during the 1990s for intermarriage-born millennials?

## 1.1 Intermarriage as a Panacea of Social Cohesion

There is no clear-cut definition of intermarriage. There exist different types of intermarriage, for instance, racial, ethnic, or religious, but they may coincide, so the boundaries between them are often blurred.

The literature on who marries whom is dominated by two themes: marriage as an exchange of social, economic, and personal relationships between spouses, and marriage as an indicator of assimilation or social distance (Schoen et al. 1989, 617). Intermarriage has long been seen as a reflection of intergroup relations and the strength of group boundaries (Gordon 1964). It also serves as the main indicator of acculturation or even assimilation (Merton 1941; Blau et al. 1982; Labov & Jacobs 1986), and, as it challenges people's ideas about dividedness, is still controversial (Osanami Törngren 2016). It is not clear whether intermarriage is a result of integration, or vice versa – integration is seen as an outcome of intermarriage (Song 2009). Integration needs to be differentiated

from assimilation. Namely, assimilation implies the diminishing of ethnic characteristics, while integration refers to the social aspect, indicating “the overall acceptance into the mainstream” (Song 2009). In writing about the assimilation process, Gordon (1964) defines three steps: cultural assimilation or acculturation, structural, and finally, marital assimilation, highlighting that this process may result in the disappearance of an ethnic group as a separate entity.

According to Peach (2005), the rate of intermarriage depends on the degree of segregation – a higher degree of segregation implies a lower degree of integration and, hence, a lower number of intermarriages. High rates of intermarriage between a minority and majority group simultaneously indicate the acceptability of the minority to the majority, and the blurring of the smaller group’s distinctiveness (Schoen et al. 1989, 618).

What also affects intermarriage rates is the location of creating such unions. The nature of the heteroethnic relationship also plays a significant role. Merton (1941, 361) suggests that “rates and patterns of intermarriage are closely related to cultural orientations, standardized distributions of income and symbols of status”. Ethnic minority members might try to “get closer” to the majority population in their homeland via intermarriage (Kemp 2006), i.e., choosing a spouse from the majority nation (Hoóz 2002). A minority spouse may become more deeply integrated into the majority society’s structures, institutions, or social networks through intermarriage.

In some cases, families value both heritages equally, thereby practising a “hybrid family culture” (Caballero 2007). It may happen that the minority spouse’s culture is dominant in some families or diminished in others. Consequently, the children born in these unions very often do not identify themselves as members of a single ethnic group and their cultural distinctiveness is rather decreased (Harris & Sim 2002). Their tendency towards the majority, minority or mixed positions is the result of both individual and contextual factors (Osanami Törngren et al. 2021). For instance, in the regions where racial categorization is not state-driven, persons from mixed marriages identify themselves as “neither-nor”, as coined by Brubaker (2016), i.e., “in a space outside the parameters of origin and ethno-racial background” (Osanami Törngren et al. 2021, 773), which could easily be applied to the situation of the heteroethnic background as is common in Central and Eastern Europe.

Because marriage is regarded as a mechanism for the transmission of ethnically specific cultural values and practices to the next generation, intermarriage may fundamentally affect the boundaries and distinctiveness of ethnic minority groups (Barth 1969). Intermarriages indicate that social, cultural, and other barriers are falling (Coleman 1994). Intergroup social categories and boundaries can be transcended with the creation of hybrid and transformative identities (Özateşler-Ülkücan 2020). If we accept that intermarriage signals the genuine social acceptance of others as equals, then we may also conclude that it reveals a

genuine decrease in ethnic and racial prejudice toward minority groups in society (Song 2009, 333). For these reasons, intermarriage is usually regarded as an indicator of a minority group's success and social acceptance (Song 2009).

Intermarriage between members of different social groups calls into question another aspect of this kind of union – its function as a connecting element in society. This is because intermarriage not only links two individuals, but also the larger groups to which these individuals belong (Smits 2010, 421). Accordingly, intermarriage concerns not only the married couple, but whole families whose members may develop the most personal relationships with each other (Hoóž 2002, 1090).

Families constitute important contexts for the social interaction and mutual acceptance that occurs between ethnic groups in society and may foster the maintenance of ethnic group boundaries (Huijnk 2011, 15). Preece (2008, 57) suggests that the use and maintenance of heritage language has a gender dimension that applies to ethnic minority women, thus apart from bearing the task of symbolizing their nation collectively, women are expected to reproduce it culturally (Yuval-Davis 1997, 196). Women bear the burden of being “mothers of the nation” (Bracewell 1996), they reproduce the boundaries of ethnic/national groups, transmit culture, and are the privileged signifiers of national difference (Kandiyoti 1994, 377). In family units with patriarchal male heads, the role of women is to reflect traditional notions of femininity, which in the case of ethnic minority women can also result in their absorption into the majority nation (Thomson 2020).

## 1.2 Intermarriages in Yugoslavia with Special Focus on Vojvodina

Botev (1994) argues that intermarriages in the former Yugoslavia were influenced by the cultural tradition of spouse selection preferences and that the Hungarian ethnic minority had the lowest barriers for ethnic intermarriages in Vojvodina. They were the most open to ethnic intermarriage with other ethnically different members of Yugoslav society. The fact that mixed marriages were condemned and ridiculed during the 1990s wars in Yugoslavia by Bosnian politicians is an apt example of the weaponization of a peaceful and voluntary union of two cultures represented by a husband and wife (Burić 2020). Intermarriages in the former Yugoslavia were influenced by the cultural traditions of different peoples and the states in which they lived, which greatly affected the choice of spouses (Botev 1994). Ruža Petrović began researching and writing about mixed marriages in Yugoslavia in the 1960s. Using statistical data, she stated that mixed marriages were a rare occurrence between the two world wars, because of church clerical rules, as religion had a far greater influence and significance compared to the later period (Petrović 1985). After World War II in Yugoslavia, the number



of mixed marriages began to grow owing to the introduction of socialist policies, such as compulsory civil marriage, urbanization, and education.

Although Petrović believed that mixed marriages in the former Yugoslavia had become a means of ethnobiological as well as ethnocultural homogenization (Petrović 1985), Burić (2020) states that a 1967 study conducted by Petrović with respondents in each of the republics and two autonomous provinces (Vojvodina and Kosovo) showed that regardless of the extent to which they varied in distrust of other ethnic groups, all respondents quickly dismissed members of other ethnic groups as possible spouses (Burić 2020). Religion remained a particularly important factor in choosing a spouse, as Petrović (1985) observes, and most ethnically mixed marriages were between spouses of the same religion (for example, Kosovo Albanians with Turks, Bosniaks with Kosovo Albanians). Montenegrins, who were mostly religiously undecided by that time, more often chose Serbs as their spouses compared to the non-Orthodox population (Burić 2020).

Instability characterized intermarriages in Yugoslavia. Petrović (1968) noticed that disagreement and differences on ethnic grounds were the root causes of the instability in mixed marriages. Burić (2020) added here an important observation: that mixed marriages were more common in cities, between spouses with a higher level of education, between whom divorce was certainly more frequent than in the rural population. Namely, mixed marriages between spouses of lower educational levels in rural areas were extremely unstable and resulted in a higher level of divorces than in those from urban areas (Burić 2020).

When it comes to multi-ethnic Vojvodina, in the period from 1956 to 2004, Sokolovska (2008) concludes (also based on statistical data) that ethnically heterogeneous marriages were entered into by all ethnic groups in the territory of Vojvodina, mostly with Serbian women. She found that the most numerous minority group, Hungarians, prefer to marry Serb women rather than Serbs Hungarian women (1.06 % vs. 0.89 %), and that religion is not crucial for Hungarians in this process (Sokolovska 2008). The Hungarian national minority had the lowest barrier to conclude ethnically mixed marriages in Vojvodina, that is, it was most open to ethnically mixed marriages with other ethnically different members of Yugoslav society (Botev 1994). This practice dates back to the time of the Austro-Hungarian monarchy, in which Hungarians were more open to marrying members of ethnic groups (Botev 1994).

The 1990s brought many socio-cultural changes, and this period was of great importance for discussion on the level of acculturation of minorities through mixed marriages in Vojvodina. As a result of the wars in the 1990s, a large number of (Serb) refugees arrived from Bosnia and Croatia, which led to a significant change in the demographic structure (Sokolovska 2008). It is interesting to point out that Botev believes that the wars of the 1990s in the former Yugoslavia bypassed Vojvodina partly because of its large number of mixed



marriages (Botev 1994). Recent research conducted after 2010, also based on statistical data, indicates that the highest rate of ethnically mixed marriages can still be found in Vojvodina, which is to be expected, given the heterogeneity of the ethnic structure of the population (Lazar & Aćimov 2017), but also given the above-mentioned cultural tradition of the population of Vojvodina.

### 1.3 The Choice of Intermarried Parents: Ethnic Minority or Majority Language of Instruction and its Effect on Ethnic Identity

A sense of belonging is an important part of identity, and as such is essential to citizens as they develop bonds with a particular territory or nation (Örkény 2005, 46). In the case of former Yugoslavia, a “supranational Yugoslav identity was built, an identity pattern which embodied the principle of brotherhood and unity” (Godina 1998, 416), and which was free from ethnic and class difference (Tóth 2019). Today, individuals born from ethnic intermarriages must choose between different ethnically-marked alternatives (Kiss 2018, 483) and in this way, artificially affirm one of their identities to the detriment of the other. It is interesting to note that members of the Hungarian minority had greater affiliation with the former Yugoslavia than Serbs (Perunović 2016).

As regards Vojvodina’s inhabitants, they developed multiple identities that did not necessarily exist in a hierarchy, but rather were awarded priority depending on the context (Šaračević 2012, 3) – this might be because ethnic communities in Vojvodina have different group characteristics (Ilić & Cvejić 1997). The Vojvodinian-Hungarian identity was developed and built during the socialist era (Losoncz 2018), in parallel with the building of a supranational Yugoslav identity. However, it only fully developed after the disappearance of Yugoslavia, and it can be “clearly differentiated from that of the wider (perhaps original?) Hungarian nation” living in Hungary (Bálint 2012, 454).

In order to preserve one’s ethnic minority identity in a nation-state, education in one’s mother tongue is crucial (Papp 2017). Education maintains the cultural and linguistic shape of the nation state (May 2012, 132), thus, ethnic minorities tend to seek the formal institutionalization of mother-tongue education and use their language at school as a means of preventing or reducing language assimilation (Papp 2014). In the Transylvanian-Hungarian context, schools play a key role in the generational reproduction of the Hungarian world in Cluj-Napoca (Brubaker et al. 2018). For mixed families, choosing the language of school instruction can have real, long-term, and far-reaching consequences – for example, in terms of choosing the child’s ethnic identity (Brubaker et al. 2018). In Transylvania, for minority Hungarians, it is not even a question of which language their children speak at school, they enrol their children in Hungarian schools by default, as this is a way of maintaining the “ethnic minority word”, but when

it comes to mixed marriages, this is not unambiguous (Brubaker et al. 2018). Some children born in intermarriages may begin their education in a Hungarian primary school and then transfer to the Romanian system in high school or in upper secondary school (Brubaker et al. 2018). In some countries, like Slovakia or Ukraine, parents of Hungarian minority children may feel that a minority Hungarian-language education would not provide their children with as many opportunities, thus they might opt for majority language schooling. If parents choose the majority language for school instruction, they may do so to better integrate their children with the majority nation, as the former is important if children are to prosper and build a career in the country in which they were born (Papp 2017, 97). Opting for majority language schooling affects the minority community on multiple levels. It narrows down the possibility for ethnic minority language schooling, because if there are not enough pupils enrolled in a class (at least five), the school will cancel the ethnic minority language class. For example, in Novi Sad (Serbia) there are currently three elementary schools and four high schools that offer instruction in Hungarian. Earlier, when more first graders were enrolled in Hungarian, more elementary schools had instruction in Hungarian. High schools also struggle with a low number of pupils in class. Some researchers argue that minority language schooling can be detrimental, since in Serbia, the teaching of all classes in primary and secondary education in the minority language, with only a few hours per week of Serbian as the majority language, created generations of unbalanced bilinguals, characterized by a very low level of Serbian language proficiency (Filipović et al. 2007). This lack of majority language proficiency resulted in a high rate of educational migration from Vojvodina that was strengthened by the fact that ethnic minority high school graduates can obtain an EU university degree in their kin-states (Lendák-Kabók et al. 2020). If they choose to stay in their home country, most of them first need to overcome the language barrier (i.e., to gain Serbian language proficiency) when starting their studies, which requires time, effort, and sacrifice (Lendák-Kabók 2021). The language barrier mostly develops in Vojvodinian municipalities, where the minority population is in majority.

Based on the above-presented contextual framework, the paper's aim is to approach the 1990s war from the perspective of intermarriage-born (Serb-Hungarian) millennials. In this sense, the paper will explore the following questions: what is the role of family choices regarding language of education in the self-representations of millennials in their adult lives? How were millennials affected by the 1990s Yugoslav wars in Vojvodina?

## 2. Methodology

The study is based on eight interviews with millennials born into Serb-Hungarian intermarriages. The snowball method (Esterberg 2001) was used when

choosing the respondents. The interviews were conducted from September to December 2019 in Hungarian and Serbian. The interview excerpts included in the paper were translated by the author from Hungarian and Serbian into English. The respondents were born between 1981 and 1989 and raised in different parts of Vojvodina. To secure the anonymity of the respondents, pseudonyms were used. The municipalities in which the interviewees from minority communities were born and raised make a difference in terms of understanding their attitudes towards ethnicity and language. These municipalities differ in regard to their ethnic compositions: in Novi Sad and Čenej, the majority of the population is Serb, thus it is more challenging for the interviewees to preserve their minority language and identity, while in Ada, Mali Idoš and Mol, Hungarians are in the majority, thus it is easier to preserve the Hungarian ethnic minority language and identity.

The interview grid consisted of twenty questions that built on each other and were divided into five main topics, namely: (1) childhood; (2) schooling; (3) the 1990s in Vojvodina; (4) ethnic identification; and (5) cultural differences in partnership and family. In this paper, we focus on topics number (2), i.e., the language of schooling, family reasons for choosing minority or majority schooling and its effects, (3) exploring the turbulent times of the 1990s, and part of topic number (4) on ethnic identification, which some respondents attached to either schooling or to their narrative about the 1990s.

Coding methods designed by Saldaña (2013) and MacQueen et al. (2009) were followed when analysing the qualitative data. First, attribute coding (MacQueen et al. 2009) was applied to code the place of birth, the place of origin, the ethnic belonging of their name and maiden name, their mother's and father's names, the language of their elementary and high school, their dominant language today, and their experience with ethnic-based conflicts. Their dominant language was the one they expressed as being dominant when the author of this paper asked them to decide. In most cases, they chose to speak in their dominant language during the interview, but some of the interviewees spoke in the minority language, even though it was not their dominant language. Narrative analysis (Law 2004) was applied to analyse the interviews, as narrative research discusses the ways in which individuals and groups interpret the social world and their place within it (Law 2004).

### 3. Empirical Findings

The findings section will present the narratives of intermarriage-born millennials. Their parents choose either majority or minority language instruction. The reasons behind these decisions will be discussed. We also analyse the ethnicity or language-related incidents which happened to our respondents during the turbulent 1990s and were somehow related to schooling.

As the analysis focuses on a special group of people in an under-researched area in Europe, it begins with a short introduction of the interviewees, presenting their family background and the place they were raised. Hobsbawm’s approach (2012) is adopted, suggesting that nations should be analysed from below by voicing individuals’ assumptions and personal perspectives on events, which was the author’s intention as well. First, we analyse the narratives of the respondents who finished at least elementary school in Hungarian, followed by the narratives of the interviewees who finished their schooling in the majority language (i.e., in Serbian).

Table 1: Attribute codes for respondents

Code	Date of birth	Place of origin	Ethnic belonging of their name	Ethnic belonging of their maiden name	Father’s ethnicity	Mother’s ethnicity	Language of elementary school	Language of high school	Language of the interview	Dominant language	Experienced ethnic-based atrocity
Ljubica	1981	Mali Idoš	Serb	Serb	Serb	Hungarian	Hungarian	Hungarian	Hungarian	Hungarian	Yes
Ivan	1982	Mol	Serb	-	Serb	Hungarian	Serbian	Serbian	Hungarian	Serbian	Yes
Eva	1982	Novi Sad	Serb/ Hungarian	Hungarian	Hungarian	Serb	Serbian	Serbian	Serbian	Serbian	No
Tara	1983	Čenej	Serb	Serb	Serb	Hungarian	Hungarian	Serbian	Serbian	Serbian	Yes
Teodora	1984	Novi Sad	Serb	Serb	Serb	Hungarian and Croatian	Serbian	Serbian	Serbian	Serbian	No
Zorana	1986	Novi Sad	Serb	Serb	Serb	Hungarian	Hungarian	Hungarian	Hungarian	Hungarian	Yes
Katarina	1986	Ada	Serb	Hungarian and Serb	Hungarian	Serb	Serbian	Serbian	Serbian	Serbian	No
Emma	1989	Novi Sad	Serb and Hungarian	Hungarian	Hungarian	Serb	Hungarian	Serbian	Hungarian	Serbian	Yes

Source: Empirical data.

In the continuance of this paper, the narratives of the respondents whose parents chose minority education for them will be presented together with the ethnic conflicts that occurred in the 1990s. Table 1 shows that four respondents went to elementary school in Hungarian and only two continued their high school in Hungarian as well.

Choosing minority-language education was the result of diverse motivation in my respondent's parents. Some attended school in Hungarian because their mother was Hungarian (Ljubica, Zorana and Teodora – all three of them have Serb names), whereas one had a Hungarian father (Emma), who insisted that she went to elementary school in Hungarian. However, he did not require her to attend high school in Hungarian as well, so she continued her education in Serbian.

As is shown in Table 1, four respondents finished their elementary and high school education in Serbian (Ivan, Eva, Teodora and Katarina), three of them (except Ivan) spoke in Serbian during the interview, stating in the beginning that they felt more comfortable to speak in Serbian, which was a sign of acculturation (Phinney 2003). My respondents did not recall any specific discussions about the choice of tuition language within their family; the decision had come naturally, which they accepted without questioning it later on.

In order to understand the respondents' social status and the environments they grew up in, their backgrounds will be presented in chronological order, considering their date of birth, starting with the respondents who finished their elementary (and high school) in Hungarian (Ljubica, Tara, Zorana and Emma) and continuing with the respondents who finished their schooling in Serbian (Ivan, Eva, Teodora and Katarina).

### 3.1 Ljubica

Ljubica (1981), whose father is Serbian and her mother Hungarian, always lived with her mother in a mid-sized, mostly Hungarian town in the north of the Bačka (in Hungarian: Bácska) region in Vojvodina. Her parents were separated, and her father lived in southern Serbia. She finished all her schooling in Hungarian, as it was left to her mother to choose the language of instruction. In her narrative, she identified with the Vojvodinian Hungarian ethnic minority group, but her Serb identity was also important for her. She recalled a period during the 1990s, when her Serb name either helped her or had its downside. In the following passage, she recalls a strong memory of an incident when her friends from school were bullied because of their ethnicity:

My Serb name once helped, because when we were going home from high school by bus once, Lovćenac and Mali Idoš were in a big fight. Then, in the late 1990s, when Lovćenac and Kishegyes were battling, they came with chains and there were

big fights. It didn't last long, but a lot of kids were beaten [...] it lasted a few months. Then we did not dare to cross through Lovćenac, or we went through Lovćenac very fearfully. In Lovćenac, the Montenegrins would not let the girls get off the bus in Mali Idoš, they would hold them and poke them. They did not hurt me because they looked at everyone's name on our ID cards, and they did not hurt me because they thought I was theirs. There were also downsides to my Serbian name. I did not get a Hungarian scholarship from Kosztolányi [school] once because I have a Serbian name, although I finished all my schooling in Hungarian (Ljubica, see Table 1).

### 3.2 Tara

Tara (1983) has a different background, as she grew up in a small Serbian settlement near Novi Sad. Her mother is Hungarian, was born in Hungary and came to live in Serbia when she met Tara's father. Tara had a Serb name and surname, just like Ljubica, but spoke in Serbian during the interview. The language of the interview was an immediate question of hers when we started the interview, as she explained that nowadays it is much easier for her to speak Serbian, which showed a clear sign of acculturation. She went to Hungarian elementary school, switching to a Serbian high school, where she remembers having language-related difficulties. The most traumatic experience for her in the 1990s was the NATO bombing in 1999<sup>3</sup> that resulted in moving to Hungary with her mother and sister, to her mother's sister. They stayed there for a while, and she also went to school. In Hungary, children were mean to her at school, she was othered because she came from Serbia – for example, they posted notes on a bench telling her to go home to Serbia.

Then it was very difficult for me because it was difficult for my class to accept me in high school, because it took me a while to switch from the Hungarian to the Serbian language. It was also hard in '99, when the war started, the bombing, then our mother packed us up and we went to Hungary to live with our aunt, but my aunt's husband spoke out openly against Milošević,<sup>4</sup> which made us even more anxious [...] we didn't know what was going on, we weren't aware of it, and mom took me and my sister away for only two or three weeks until everything calmed down a bit. In the end, we stayed there for three months, and they enrolled us in school – I went to high school, my sister went to elementary school, and I think my sister didn't have any problems at all. She hung out there with those children, because they were younger, so I guess they weren't aware. My case was different, children left me messages on the bench: "Go back to Serbia!", you know, written in pencil (Tara, see Table 1).

### 3.3 Zorana

Zorana (1986) has a Serb name, but spoke in Hungarian during the interview, and has no difficulty with either the Hungarian or Serbian language. She consid-



ered herself truly bilingual. Her late father was Serb and her mother is Hungarian. She was born and raised in Novi Sad, which is a city predominantly inhabited by the majority population. She completed all her schooling in Hungarian, including at the Faculty of Philosophy in Novi Sad, where she had an opportunity to study and have exams in Hungarian in certain subjects that were taught by professors of Hungarian origin.<sup>5</sup> Although she wanted to enrol in a high school specialising in languages, the environment was rather competitive and she was not accepted, therefore she enrolled in one Hungarian class at a grammar school. Her high-school education in the Hungarian language was a second choice for her, since the competition for enrolment was not as fierce as it was in some high schools in Serbian, since the “minority world” (Brubaker et al. 2006) does not struggle with oversubscription of students, as there are ever fewer ethnic minority Hungarian students at every level of schooling. Her father wanted her to be educated in Hungarian during elementary school, as he was aware of the advantages of bilingualism. Later, bilingualism became her main trump card in life, as she got all her jobs because she was bilingual.

I went to primary and secondary school in Novi Sad, and to the University of Novi Sad, Faculty of Philosophy, I studied journalism, I chose the Hungarian group. Education in Hungarian was my father's wish, and my sister and I went to a Hungarian school, he thought that if we chose schooling in Serbian, we would forget Hungarian (Zorana, see Table 1).

When it comes to the 1990s, which divided people on an ethnic basis, Zorana narrated an occasion when their female neighbour, who was Hungarian, but who hid her origins by not speaking Hungarian at all, posted an offensive message on a tree. The female neighbour had probably rationalized her position by highlighting her success at being socially accepted by the majority population (Song 2009), thus accepting the cultural badge (Kalmijn 1998) of her husband in a majority environment, and in a tension-filled moment even denying her ethnic origin:

It happened at school in general. I felt that when my mom and I were going somewhere by bus, I somehow felt the negative energy in the air because they used to look at us for a moment. They did not speak. There was one occasion that I remember, at school [...] a little Serb girl came up to me and said that I should speak Serbian because I had a Serb surname and name. I will also say that we had a Hungarian neighbour in our building, her son was Serbian, she stopped speaking in Hungarian, and her husband was also Serbian. On one occasion, a piece of paper was glued to a tree with the printed message “Hungarians under the ice!”<sup>6</sup> My dad also wrote an article about this at the time<sup>7</sup> which also appeared in the newspaper. They were very upset because of that (Zorana, see Table 1).

### 3.4 Emma

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Emma (1989) spoke in Hungarian during the interview, although she was somewhat reserved and spoke in short sentences. Clearly Serbian was her stronger language, but even though the researcher offered to continue the conversation in Serbian, she did not accept. Her father was Hungarian and her mother Serb, while her maiden name and surname were both Hungarian. She was born and raised in a predominantly Serbian city, a majority Serbian environment, where she completed kindergarten and elementary school in Hungarian but graduated from a prestigious grammar school in Serbian. In her narrative, she was less positive about ethnic minority language schooling – she said that her class in elementary school was small, with fewer than ten pupils, which she experienced as a disadvantage because of the lack of opportunity to socialize and make friends of her preference, which would be normal in a bigger class. This was because of the Yugoslav war, as by the time Emma started elementary school in 1995, a lot of ethnic minority Hungarians had left Serbia, owing to difficult economic and unstable social and political circumstances (Göncz 2004). In her Hungarian class, she felt discomfort due to her mixed origin and used a strong word for the chauvinism that she also used to feel later in a Serbian environment. Namely, at the elite grammar school, for not being an ethnic Serb. Emma attended Hungarian classes at another grammar school in order to maintain her minority-language skills and learn about Hungarian grammar and literature. This was her father's wish. Thus, she completed four years of Hungarian language and literature studies and passed the graduation exam in Hungarian as well. It should be noted that her father was a university professor, therefore more conscientious of his ethnic belonging and with the positive side of bilingualism. She spoke of her experience in the following passage:

I went to kindergarten and primary school in Hungarian, but I finished grammar school in Serbian, while also going to Hungarian classes in parallel at another school. At the end of each year, I took an exam in the Hungarian language and literature. That is how I have a high-school degree in Hungarian language and literature as well. I felt the chauvinism of a few teachers in elementary school, whose behaviour differentiated between 'pure' Hungarian and mixed-origin students. And in high school, I felt Serbian chauvinism from a teacher because I was not a 'pure' Serb. At high school, where there were about thirty of us, the environment was much healthier (Emma, see Table 1).

### 3.5 Ivan

Ivan (1982) had a Serb name and surname. He spoke in Hungarian during the interview. His father is a Serb and his mother is Hungarian, and even his father's mother was Hungarian. His parents divorced during the 1990s. He and his sister

went to school in Serbian in a predominantly Hungarian environment. In his narrative, he did not recall whether his parents discussed his going to a school in Serbian. He did not question their decision. It could be argued that his father's (partial) belonging to the majority nation was a cultural badge worth wearing and following (Kalmijn 1998). He had both Hungarian and Serbian friends, regardless of going to a Serbian school, because he lived in an environment that had a Hungarian majority. His work required him to use both Hungarian and Serbian, and his minority language competency served as an advantage when finding work. He talked about the language choice of his schooling in the following excerpt:

I finished my elementary and high school in Serbian. This was because of my father. Although he does not declare himself a Serbian – his mother was also Hungarian. Somehow it was like that. I do not know if my parents discussed this, but it came as natural to them. I went to kindergarten in Hungarian, and I developed this bilingualism, even then, and since then I have been bilingual [...] my Serbian is a bit stronger, but my Hungarian language is also quite good. The language that I use for business purposes is also Hungarian (Ivan, see Table 1).

Ivan talked about always being somewhere “in-between”, or neither-nor (Brubaker 2016). As he went to a Serbian class but had many Hungarian friends, when ethnicity-based gang-fights took place in elementary school, he had to avoid choosing sides, and because of his Serbian schooling, he may be seen as being in the “anteroom of becoming a member of the majority nations” (Öllös 2012). He recalled that ethnicity-based fights were not significant clashes. When he was a student in Novi Sad, at the beginning of the 2000s, there was a situation in a bakery where comments were made about him and his friends because they were speaking in Hungarian. He approached the person and sorted out the situation. The following is an excerpt of his narrative:

During the 1990s there were ethnic conflicts which ended up in fights, but organized or exaggerated hatred was not the case. I heard that there were situations like this in Novi Sad in the '90s, but when I studied there between 2003 and 2009 nothing like that happened [...]. Once we were in a bigger group and went into a bakery or diner, someone muttered in the background about us speaking in Hungarian. So, I went up to him and told him how things were, so that was the only case that I can mention from my personal experience (Ivan, see Table 1).

Although Ivan does not explain in his narrative what he did exactly to sort out the minority-language use incident, the fact that Vojvodina was and still is a multilingual and multicultural region means that people can refer to this fact when such incidents occur, i.e., they expect a certain level of tolerance.

### 3.6 Eva

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Eva (1982) spoke in Serbian during the interview. She has a Hungarian name, and her maiden name was also Hungarian, but when she married her husband (ethnic Serb) she took his last name. Her mother was Serbian and her father Hungarian, they are both deceased. In her narrative, she emphasised how they used both languages at home (Hungarian with her father, and mostly Serbian with her mother and sister, thus in her family the most used language was Serbian). She went to school in Serbian in a majority Serbian city environment. Her school did have a Hungarian class as well, but her parents decided to enrol her and her sister into a Serbian class. This was also something natural for her; she never asked questions or wondered too much about her parents' decision. The decision may have been connected more to her older sister, as the family moved around the city when the girls were small, and the first school in which her parents enrolled her sister was close to their home but did not have Hungarian language instruction. In her case, geographical distance played a role in the choice of language of instruction. When intermarried couples live on the periphery of a region inhabited by an ethnic minority group, like in Novi Sad, they often live further away from the limited number of schools that offer minority-language tuition. Therefore, like in Eva's case, intermarried parents may make their school choice based on their perceived level of comfort and enrol their children into majority language schools which are nearby. Afterwards, Eva and her sister transferred to a school that had a Hungarian class, but their parents did not change their daughters' language of instruction, as that would have required a language transition for the children, thus both of them continued tuition in Serbian. Although Eva emphasized that her sister had friends from the Hungarian class with whom she is still in contact, Eva did not mention having the same experience.

Yes [I finished my schooling in Serbian], my sister too. She had friends then, and today she has friends from the Hungarian class as well from the Petefi<sup>8</sup> school. My parents decided to enrol us in a Serbian class mostly to make it easier for us later [...] since I started ballet when I was five, and I knew from a young age that would be my occupation when I grew up [...] and we moved a few times because my parents were subtenants at the beginning (Eva, see Table 1).

For Eva, Serbian was her dominant language – she did not even talk in Hungarian for ten years. This changed when she gave birth to her first child and decided to introduce him to the minority language through speaking with him in Hungarian. Notably, when she and her husband enrolled their children into a Hungarian kindergarten, she also started working in a Hungarian-speaking environment, which was also a trigger for awakening her mixed identity characteristics, of which one part was the Hungarian ethnic minority identity, which she mostly connected to the Hungarian language.

Eva did not recall experiencing any inconveniences because of her mixed identity, but she emphasized the importance of speaking Serbian flawlessly, without an accent. Failure to do this is, in her opinion, the biggest disadvantage of homogenous Hungarian ethnic minority families (cf. Russo et al. 2017). Not speaking the language grammatically correctly may simply be a result of “imbalanced bilingualism” (Filipović et al. 2007) because parents do not invest sufficient effort into acquiring perfect majority language skills. Eva’s interview excerpt follows:

Both because of the accent and because of insufficient language skill, how can I say, you know, grammatically insufficiently correct, and because you always have the impression you know, they pretend they cannot master it, you know, my Serbian friends asked me “How is this possible?”. I think if we moved to Sweden, and our children went to school there in Swedish, they would have to learn Swedish. How is it possible that someone living in Serbia does not know Serbian well enough?! It is simply a big mistake for them not to teach their children Serbian, so I think it would be easier for them to live in this country until they decide they want to go somewhere else, you know, when they are old enough, because it [a lack of language skills] kind of holds you back because [...] if you understand me [...]. I mean this is of course not my opinion, I generally tell you what I heard from those who said this to me [...] (Eva, see Table 1).

Eva’s narrative included a critique of parents who live in a homogenous ethnic minority marriage and do not emphasise the need to acquire perfect knowledge of the Serbian language, which might result in their children leaving the country they were born in (Lendák-Kabók et al. 2020). A lack of understanding of the ethnic minority Hungarian groups’ problems with Serbian language learning was also noticeable in her narrative: Eva compared the Hungarian ethnic minority to an immigrant group in Sweden, which would have a different status compared to that of an ethnic minority in Serbia.

### 3.7 Teodora

Teodora (1984) had a Serb name and surname and she spoke in Serbian during the interview. Her mother is from a Hungarian family, and her father is Serbian. She was brought up by her single mother. They lived with their grandparents who lived in an urban area where mostly Hungarian families lived. Within her family they spoke Hungarian, but with Teodora they spoke in Serbian. Thus, when her mother enrolled her in a Hungarian-language kindergarten, she felt uncomfortable and refused to learn the minority language. Afterwards, she attended school in Serbian, where there was a Hungarian class as well. She had extracurricular Hungarian classes at school but did not learn to speak Hungarian. Later, when she moved to another area of the city, where there were block houses in the 1990s, she felt alienated from other children, as she was not one of

them, because of having an interethnic background. Moreover, she was Catholic, not Orthodox as the Serb majority, which meant that she did not celebrate the same religious holidays. It was a rather traumatic experience for her, since at her new school, she was not accepted by the other children. She connected this with a period of absolute chaos, when children were infected by the nationalist propaganda coming from the media, but also from their parents. The following is an excerpt of her interview:

I think that in the new part of the city it was [the alienation] more present than elsewhere because ethnicities are quite separated, whereas among the children – especially among them – a considerable amount of harassment was there (Teodora, see Table 1).

Teodora does not consider herself a part of the Hungarian ethnic minority today. The only string that connects her to her minority nation is her religion.

### 3.8 Katarina

Katarina's (1986) father is Hungarian, and her mother is Serb. She was educated in Serbian, in a predominantly Hungarian environment in a mid-sized town in Vojvodina. Her maiden name had Serbian and Hungarian elements, as her last name was Hungarian and her name Serbian. Her parents connected the decision about her schooling in Serbian to her mother's availability – she was the one who spent more time at home helping the children with their school assignments. Kandiyoti (1994, 377) states that it is women who transmit culture, and they are the privileged signifiers of national difference, therefore, in intermarriages, they may interpret this role through culturally reproducing their own identity via schooling. Katarina spoke in Serbian during the interview, discussing the importance of acquiring perfect knowledge of the Serbian language. This is important for her, as she lives in Serbia and does not feel anything towards Hungary: as she emphasized in her narrative, it is not a kin-state for her. She did not learn to write and read in Hungarian, which she regrets now, as it would have opened new possibilities for her. The following is an excerpt of her interview:

Yes, because one of their ideas [...] because my mother was more at home, she could help with our studying, as well as because we live in Serbia, they thought it was very important to know how to speak Serbian correctly so that we might not have problems later. I always asked them why they sent me to a Serbian class because I thought that if I went to a Hungarian class I would learn to write and read. Their answer was that my [Serbian-speaking] mom was at home more and she could study with me. Believe me, after that, I didn't ask them about it anymore, and I don't know if there was any other reason for it [...] (Katarina, see Table 1).



Katarina did not experience any discrimination because of her intermarried origin, namely a mostly Hungarian environment, where people are used to living together with neighbours with different ethnic backgrounds. Peaceful living together with other ethnic groups was why Ilić & Cvejić (1997) argued that Hungarians in Vojvodina did not focus their dissatisfaction on confrontation with the Serbian majority, but rather their dissatisfaction involved worsening economic and social conditions, which were the result of the Yugoslav wars in the 1990s (Ilić & Cvejić 1997). Katarina did not opt for one or the other forms of ethnic belonging but spoke about how she told people she had two identities, although this is something she only said to people with whom she became close, and who were able to understand regional ethnic diversity. She was always proud of being half Serbian and half Hungarian:

I have never had problems there because I am half Serbian, half Hungarian, because people who live there are used to being both, and there have never been any problems, I have never felt any kind of discrimination at any point in my life because I am half Hungarian. I am very proud of my origin in general, both Serbian and Hungarian, so when I introduce myself to someone, I always say I am both (Katarina, see Table 1).

She talked about how she came by her current job because she speaks both languages and that even though she never thought that she would need the Hungarian language in her professional life, she relied on it to get her first position.

## 4. Discussion

The findings show that the respondents whose schooling was in Serbian departed from the ethnic minority group more, and even if they cultivated the ethnic minority language, it became a means of acquiring a job or for further career advancement, i.e., cultural capital transformed to economic capital (Bourdieu 1991), not for forming bonds with the minority group.<sup>9</sup> Those who finished both elementary and high school in a minority language preserved stronger bonds with the ethnic minority group. The environment also had a significant influence on (not) preserving the minority language; those who grew up in a mostly minority-inhabited environment had a better chance at preserving the minority language. Nevertheless, when it comes to ethnic minority language loss, for most of them, Serbian became the dominant language with a clear fading or even loss of the minority language. Minority language loss was also visible from the results presented in Table 1, since for six respondents (out of eight) Serbian became their dominant language. One respondent stated that for her both languages were equally strong, and for another Hungarian was the stronger language, which underpinned previous findings, which state that intermarriage may fundamentally affect the boundaries and distinctiveness of ethnic minority

groups (Barth 1969). Even though some of the respondents finished their elementary education in Hungarian, their continuation of their high-school education in Serbian and the environment they were brought up and lived in contributed to the loss of their minority language skills (Phinney 2003). Consequently, they avoided speaking Hungarian in public, preferring to speak only in Serbian, which was reflected in the choice of language of the interview (see Table 1).

When it comes to parents' choice of tuition language, a gender dimension occurred. Namely, in families where the mothers were from the majority community, children went to school in the majority language – as women are entrusted with the supervision of their children's schooling, thus they are the ones reproducing cultural boundaries (Yuval-Davis 1997, 196). In intermarriages, this meant that the tuition language was the same as the mother's language. We might argue that this arrangement made it harder for minority fathers whose majority (Serbian) spouses did not speak the minority language to choose a minority language education for their children, which would mean that they would have to break the patriarchal norm and oversee their children's education. However, in some cases of family units with patriarchal male heads, the role of women is to reflect traditional notions of femininity (Thomson 2020), which meant that the father's choice is to be respected when it comes to the choice of language of schooling.

In one case, an ethnic minority father insisted on the minority language education of their children, as he identified the knowledge and use of an ethnic minority language as a tool which he wanted to cultivate in their children. The influence of ethnic minority mothers in intermarriages was less visible in terms of choosing the language of instruction at school. More specifically, only a single mother was able to influence and/or make that choice. Choosing the language of instruction for children is a long-term decision, which has a strong impact on identity development, thus, in a patriarchal society, this choice is made mostly by men. In the case of single mothers, they are the ones with more social power within the family (freed of the male head of the family), as they are the ones taking care of the children most of the time, while fathers are less involved. In this scenario, they can choose the minority language for their children more freely.

## 5. Conclusion

The supranational Yugoslav identity (Godina 1998) disappeared during and after the 1990s Yugoslav wars, which made intermarriage-born millennials' position harder, as they had to choose their ethnic belonging. Their choice of ethnic belonging was associated with the language of the school instruction their parents choose for them; thus, this was the milestone event in their lives. The choice of language of instruction at school was in a way choosing a side and becoming closer to the majority nation or to the minority.

Intermarriage-born millennials faced additional ethnic tension during the 1990s, as this period was permeated by ethnic conflicts and an outbreak of hatred and hostility towards national minorities, or towards all those who differed from the majority nation (Savić 2006). Only those who had gone to school in Serbian stated that they had not experienced any ethnically-based atrocities, which brings us to the conclusion that finishing elementary school during the 1990s in an ethnic minority language was a source of discrimination for the respondents, which inevitably left its traces in their upbringing.

In the end, we should note that there are considerable limitations when using interviews and when relying on a qualitative study, especially with the small number of interviews. However, the author hopes that this article will open a discussion on how ethnic intermarriage exists and evolves society in Vojvodina nowadays, and that more research will be done from a qualitative perspective.

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## Notes

- <sup>1</sup> Serbs, Hungarians, Slovaks, Croats, Romani, Romanians, Montenegrins, Bunjevci, Rusyns, Macedonians, Ukrainians, ethnic Muslims, Germans, Albanians, Slovenes, Bulgarians, Gorani, Russians, Bosniaks, Vlachs, ethnic Yugoslavs, Others, Regional identity, Undeclared and Unknown (Statistical Office of the Republic of Serbia 2012).
- <sup>2</sup> Hobsbawm's (2012) approach was applied by Brubaker et al. in their book *Nationalist politics and everyday ethnicity in a Transylvanian town* (2018).



- <sup>3</sup> The NATO bombing of Yugoslavia was a military operation against the Federal Republic of Yugoslavia during the Kosovo War. The air strikes lasted from 24 March 1999 to 10 June 1999. The bombings continued until an agreement was reached that led to the withdrawal of Yugoslav armed forces from Kosovo and the establishment of the United Nations Interim Administration Mission in Kosovo, a UN peacekeeping mission.
- <sup>4</sup> Slobodan Milošević was the Serbian dictator who was charged by the International Criminal Tribunal for the former Yugoslavia (ICTY) with war crimes in connection with the Bosnian War, the Croatian War of Independence, and the Kosovo War.
- <sup>5</sup> There is no comprehensive Hungarian language university in Vojvodina, however at the Faculty of Philosophy, some subjects can be studied in Hungarian because of the willingness of the professors who are of Hungarian origin and speak Hungarian, but also because of the openness of the management, which is not against this practice.
- <sup>6</sup> This offensive note may be associated with the Raid (*Pauzija/Racija*), which was a military operation carried out by the *Királyi Honvédség*, the armed forces of Hungary during World War II, after the occupation and annexation of the Vojvodinian territories that belonged to the Austro-Hungarian Empire before World War I. It resulted in the deaths of approximately 4,000 civilians in the southern Bačka (Bácska) region in Vojvodina. The victims in both Novi Sad and the wider region were mostly Jews and Serbs, although several Hungarians were killed as well. In Novi Sad, victims were forced to march across the frozen Danube, only to perish when the ice sheet was shattered by shelling from the shore. Some victims were pushed into holes in the ice sheet, causing them to drown or succumb to hypothermia, while others were shot in the streets. The retribution committed by the Partisans against Germans, Hungarians, and Serbs was severe in 1944–45; at least 55,973 people died. The vast majority of victims were summarily executed without trial.
- <sup>7</sup> Her father was a journalist.
- <sup>8</sup> The school is named after Hungarian poet Jožef Attila (in Hungarian: József Attila), who lived in the early 20<sup>th</sup> century.
- <sup>9</sup> The same tendencies can be observed also elsewhere, see for example Naceva (2021), Riman & Novak Lukanović (2021) and Zorčič (2020).

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Barna Szamosi

## Implications of Racial/Ethnic Classification in the Hungarian Post-Genomic Medical Discourse

Racial/ethnic categorization in medicine presents challenges for clinicians and patients alike. Challenges arise because racial/ethnic identities do not match with objective biological traits, and at the same time, these identities do have medical consequences in a racially and ethnically stratified society. Three major epistemological approaches – biological realism, eliminativism, and constructivism – dominate scientific theorization on the consequences of racial/ethnic categorization in medicine. In this paper, I present a case study of Hungarian medical genetic discourse that focuses on the possible applications of race/ethnicity regarding Roma and non-Roma patients. In applying the methods of constructivist grounded theory, I recorded and analysed 34 expert interviews with human geneticists between 2011 and 2015. In this paper, I argue that the constructivist understanding of medical diagnoses must be complemented with materialist sensitivity, thus making sense of the contingent nature of race/ethnicity as factors that contribute to medical understanding.

**Keywords:** medical genetics, health equality, race, ethnicity, Roma.

## Posledice rasne oz. etnične klasifikacije v madžarskem postgenomskem medicinskem diskurzu

Rasna oz. etnična kategorizacija v medicini pomeni izziv tako za zdravnike kot za paciente. Težave nastajajo, ker se rasne oz. etnične identitete ne ujemajo z objektivnimi biološkimi lastnostmi, hkrati pa imajo v rasno in etnično razslojeni družbi določene zdravstvene posledice. V znanstvenih teorijah o posledicah rasne oz. etnične kategorizacije v medicini izstopajo trije epistemološki pristopi: biološki realizem, eliminativizem in konstruktivizem. Prispevek predstavlja študijo primera madžarskega medicinskega diskurza na področju genetike, ki se osredotoča na upoštevanje rasne oz. etnične klasifikacije romskih in neromskih bolnikov. Ob uporabi metod konstruktivistično utemeljene teorije je bilo med letoma 2011 in 2015 posnetih in analiziranih 34 intervjujev s strokovnjaki za človeško genetiko. Prispevek zagovarja stališče, da je treba konstruktivistično razumevanje diagnoz dopolniti z materialistično občutljivostjo in tako rasno oz. etnično klasifikacijo upoštevati kot dejavnika, ki prispevata k razumevanju zdravstvenih razlik med prebivalstvom.

**Ključne besede:** medicinska genetika, enakost na področju zdravja, rasna in etnična pripadnost, Romi.

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## 1. Introduction

In the 1960s, it was found that members of Hungarian Roma communities were in such an economically marginalized situation and subject to further racial discrimination that their health standards were far below the national average. Since that period, significant medical and sociological research has been aimed at working out ways to ameliorate their living conditions, but because of systematic discrimination the research results were not put to use efficiently. The possibility of joining the European Union opened up for Hungary during the 1990s, and in 2004 the country successfully met the required criteria. As part of the requirements, it was mandatory to develop the rights and protection of minorities in Hungary (Kósa et al. 2002). The health protection of Roma was one of the key priorities, and some of the most important goals sociologists and healthcare professionals identified were the improvement of housing possibilities, access to employment, and access to healthcare services. Medical geneticists contributed to this discussion with their own expertise by claiming that to improve the health standards of Roma it is important to map the most prevalent inheritable genetic disorders in their communities, as well as the epidemiologically relevant genetic markers that cause them to be at risk for diseases. One of the conclusions that was drawn from the early epidemiologically important genetic studies is the fact that ethnic identity is only important because it meshes biological causes with social factors and is thus useful for better diagnosis and better healthcare service. Geneticists acknowledged that biological differences can be important for both patients and clinicians, and the socially marginalized situation of Roma should be considered during medical interviews. The everyday racism that they endure during healthcare services must also be taken into account when healthcare statistics are evaluated. Thus, in this paper, I will contribute to the understanding of race/ethnicity in the Hungarian medical genetic context.

In the international literature that deals with the applications of genetic results to improve health disparities it is possible to delineate two directions. The first approach considers connecting genetic patterns to race/ethnicity to be a scientific error, while the second approach embraces racial/ethnic classification of biological materials because it is argued that this technique speeds up and therefore helps medical diagnosis. Starting from these grounds, I rely on critical constructivist approaches that can accommodate the context dependence of racial/ethnic identities in medicine, but at the same time give a critical view on the essentializing tendencies of the genetic discourse and its possible drawbacks. Thus, in this paper I will briefly review the major framework regarding the conceptualization of race and connect it to contemporary epistemological discussions. My aim is to provide theoretical underpinnings to my argument that an essentialist understanding of race in the medical sciences could prove to be very dangerous in a society that structurally marginalizes and discriminates against

racial minorities. In order to support my claim I will analyse the arguments that complicate the use of racial/ethnic classification in medical genetics. We live in a racially stratified society, and currently it is not possible and not desirable to get rid of racial categorization because it would seriously damage medical understanding and thus equality in healthcare (Rose 2007). Another reason is connected to this last problem; if a society wants to offer identical treatment<sup>1</sup> to all its citizens, it must take into account various identity categories, from class and gender to race/ethnicity (Risch et al. 2002). These issues are interconnected, and the suggested avenue is to tackle health problems with the present vocabulary and with the already established racial framework. However, medical geneticists do not accept racial/ethnic categorization in medicine unanimously and uncritically, and they do question the essential nature of race (Feldman & Lewontin 2008). There are also geneticists who suggest that a focus on individual genetic make-up will provide better information for establishing a diagnosis and thus providing identical healthcare, but at the same time race and ethnicity cannot be discarded just yet.

## 2. Methodology

I designed a qualitative study in which I interviewed 34 medical and clinical geneticists based in the cities of Budapest, Debrecen, Szeged, Pécs, Miskolc, and Győr. All of them had clinical experience with Roma and non-Roma patients, and some of them had even taken part in mapping population specific disorders. I executed the analysis of the collected interview materials and reported my findings according to the criteria of constructivist grounded theory (Charmaz 2003; 2006; Clarke 2005).

### 2.1. Ethics, Consent, and Permissions

This research was approved by the Central European University. I obtained consent verbally from all of the participants and I provided information about the aims of my research to everyone. I did not give any compensation of incentives to the interviewees.

### 2.2. Sampling and Data

I began collecting interviews through a series of lectures that were organized at the Semmelweis Medical University in Budapest. I collected the contact information of geneticists who had a focus on racial/ethnic issues in medicine. During the interviews, I asked for the contact information of other geneticists in order to contact those whose work in the field was valued by their colleagues. I chose to do semi-structured interviews because this method allows for constant

adjustments during the research process. I conducted the interviews between 2011 and 2015; the interviews lasted between 60 and 120 minutes. All of the interviews were conducted in Hungarian and were audio-recorded. Subsequently, I transcribed all of the interviews in Hungarian and I translated only the parts of the interviews that became relevant after the coding process. In the analysis, I coded all of my interviews as Personal Interview (PI) followed by the date it took place, in order to keep the professional identities of my interviewees safe.

### 2.3. Qualitative Analysis

In order to analyse my material I relied on the guidelines of Adele E. Clarke (2005) and Kathy Charmaz (2003; 2006). As Clarke suggests in her work, I used situational maps to complement the coding and memo-writing strategies traditionally used by grounded theorists. In my work, I went through three coding phases while I analysed the transcripts. At first my aim was to develop active short codes to capture the incidents told by my interviewees. Later, I developed focused codes that helped to clarify the most important and recurring themes that I eventually used in a comparative manner. In the third phase, I developed theoretical codes that became part of my final analysis. Charmaz states (2003, 261) that in order to provide a focused and sharp analysis researchers must employ the method of memo-writing as an intermediate step between coding and the final analysis. This served the purpose of elaborating on the analytical insights. With these methods, I mapped the elements at different locations, in different narratives that played a role in the production of various medical realities regarding racial/ethnic categorization.

## 3. Conceptualization of Race

There are three major approaches to theorizing race in philosophy of science: these are called biological realism, constructivism, and eliminativism (Haslanger 2008; Ludwig 2017). The most important distinction among these approaches is how theorists who work within these paradigms regard race: eliminativists, for example, consider race to be something that is non-existent, therefore it is counterproductive to discuss its relevance in any medical discourse. Their approach was criticized by many scholars for turning a blind eye towards skin colour; this approach, they claimed, would not solve the very real problems of everyday racism that people face in various societies. Social constructivists think that race is real in the sense that it is a social construct based on material differences, and although it is imbued with different values in different social and historical contexts, it has very real consequences for people experiencing discrimination or privilege because of a racial discourse. Biological realism holds that there are races that correspond to biological differences. This strand of theorizing has



become revitalized as a result of molecular genetic studies. After the completion of Human Genome Project (Fridovich-Keil, Invalid Date), it is argued that within the differences mapped it is possible to find the reason for racial diversity that corresponds to racial subgroups which in turn, if recognized, contribute to health equality. In the following, I will overview very briefly the main shifts that took place in scientific thought about race.

During the Enlightenment, the work of Johann Friedrich Blumenbach entitled *On the Innate Variety of Mankind*, published in 1775, defined the direction of racial studies for the coming 150 years and it had a long-lasting impact on the twentieth century (Smith 2015, 253; Raskó 2015, 147). Blumenbach described four geographical varieties in his 1775 edition, then changed it slightly to five varieties in 1781, when he reworked his thesis, and finally concluded with five generic varieties classified as Caucasians, Mongolians, Ethiopians, Americans, and Malays in the final re-edition of his thesis in 1795 (Bhopal 2007, 1308). Justin E. H. Smith argues in his book that although Blumenbach was hesitant to claim that there is a biological reality according to which clear racial divisions can be made, he still maintained, through statistical measurements of human skulls that it is legitimate to support the racial classification of peoples into the racial taxonomic system that he proposed (Smith 2015, 259–260). This is why Smith (2015, 259) claims that Blumenbach was a “statistical racial realist”, and his work lent itself easily to succeeding theorists whose aim was to establish accounts for the biological reality of race.

The view that there are essential racial types started to become more and more incompatible with developments in biological research. First Charles Darwin’s evolutionary theory questioned whether it was possible to pinpoint toward racial types, and then later Mendelian genetics provided rational arguments in favour of abandoning the essentialist approach. By the early twentieth century, the essentialist concept of race was supplanted by a geographical concept that divided races into subdivisions according to their geographic origin. For example, William Z. Ripley, in his work published in 1899, divided the people of Europe according to three different geographical regions: Alpine, Mediterranean, and Nordic (Marks 2008, 22–23). A series of works appeared in this paradigm from which perhaps the work of Theodozios Dobzhansky was the most significant in 1937, titled *Genetics and the Origin of Species* (Dobzhansky 1982). Although the Second World War had an important impact on the reconceptualization of race, it is needless to say that the Unesco Statement on the Nature of Race and Racial Differences (UNESCO 1952) described three major races – European, Asian, and African – and an unspecified number of subdivisions, which still adhered to the geographical type paradigm. This understanding dominated scientific thinking until the 1960s.

The civil rights movement in the 1960s pushed the theorization of race in a new direction. In 1962 Frank Livingstone argued that it is best to understand

racial difference in terms of clines, which are “geographical gradients of features in natural populations” (Livingstone 1962, 279, cited in Marks 2008, 24). In a similar manner, Richard Lewontin (1972, cited in Marks 2008, 24) quantitatively compared populations from a genetic perspective. He concluded that intra-group differences are larger than in-between group differences, thus deconstructing the race-as-geographical-type concept. As noted by Marks (2008) Lewontin still holds that despite the developments in molecular genetic studies, abandonment of the biological race concept in medical research was well-supported. Marcus Feldman and Richard Lewontin (2008, 90) state that if medical professionals understand race/ethnicity as a social construct, they can gain important knowledge about the social-environmental factors that determine the health status of patients. In particular, knowledge about race/ethnicity can be informative in order to fight discrimination on the micro-, meso-, and macro-levels of society.

The third and perhaps most radical shift occurred during the 1990s, when researchers suggested that roughly 7 % of our molecular genetic difference could be racially relevant (cf. Sesardic 2010, 148–149). They argued that perhaps a more thorough understanding of this part of the human genome could contribute to making sense of human racial differences. The process through which race is projected onto the molecular level is called the molecularization of race (Kahn 2008; 2012; Fullwiley 2008; Duster 2006). It would be a misunderstanding to see the present process of racialization as unreflective of racism – it is the opposite; scientists apply race in genomics as a biosocial reality but at the same time they are working towards the genetic explanations and rebuttals of any kind of racism; this is called the biosocial paradox of race (Bliss 2011, 1019). The primary aim of racial classification that is advanced by scientists who work with genomic-level data is to overcome health inequality that is caused by systematic racism.

#### 4. Arguments for Classifying Genetic Material According to Racial/Ethnic Identity

Although scientists widely acknowledged that it is hard to define what race/ethnicity means in biomedical research, at the beginning of the twenty-first century, Nikolas Rose argued that it is inescapable for researchers working in the field of biomedicine to categorize through racial/ethnic identity (Rose 2007, 172). Skin color is one of the markers (besides hair texture, and bone structure) that define racial belonging following the work of modern naturalists. Although numerous scholars point out that skin color or bone structure cannot be used to group people together for medical genetic purposes because it is a very arbitrary marker (Gould 1981), it is still viewed by others as a medically valid factor of cat-

egorization. It is claimed that folk racial/ethnic categorization is useful because it shows that members of such groups share medically relevant genetic histories. The following quote from an interview emphasizes that skin colour indicates deeper medical relevance than superficial racial resemblance:

Skin colour is not only a superficial marker that accidentally helps, obviously, Caucasians or white people resemble each other more than white people resemble black people. But within the white population, or black or Asian, a Japanese is utterly different – not fundamentally of course – but represents a significant genetic difference in contrast to an Indian or Nepalese. This is because of the migratory routes of different populations. Those who lived together for a long enough time developed genetically unique characteristics (PI 20130311).

I do not interpret the above claim to be in tension with the medical genetic knowledge that within-group differences can be larger than differences between groups. This position rather entails that, although there are no fundamental differences among human beings, there is medically useful information that can be teased out with the use of racial/ethnic categories.

In the Hungarian social context, numerous racial and ethnic groups have been analysed by geneticists (cf. Béres 2003). Within these populations, in most interviews Caucasians were viewed as the medically most significant group, and besides them Roma and Jewish groups were highlighted. In the excerpt below, it is noted that superficial racial/ethnic characteristics are not helpful in directing the caregiving process because in some cases they are not visible, or they do not diverge from the dominant look of individuals in the country. In these cases, self-defined ethnicity is understood to be crucial for precise diagnosis.

In Hungary the most significant ethnic group is the Caucasian, and there are a few Roma and Jewish groups. But I only inquire about ethnicity in the case of concrete diseases, when those are more prevalent in certain ethnic groups; because I can't always recognize from the appearance of the patients which race they belong to (PI 20121207).

To put it differently, medical genetic knowledge cannot be applied by clinicians in certain cases when there is no knowledge about ethnic belonging and only a medical hypothesis exists about a possible diagnosis based on the medical interview and examination of the patient. This medical hypothesis rests on the previously existing racial stratification of people. Thus, self-defined race/ethnicity is viewed as a very good marker for the medical understanding of the health status of the patient (Risch et al. 2002). Risch and his colleagues argue that most of the research that addressed the genetic and epidemiological validity of race is not objective, hence these studies, they claim, cannot contribute to the scientifically grounded reformation of healthcare. They acknowledge that because of the past

and present racial/ethnic discourse of the United States, racial/ethnic minorities are disadvantaged and their disadvantageous social position largely defines their health standards; they say that besides the genetic structure – about which they claim that racial/ethnic communities resembling their own members more than non-members is empirically provable – it is needless to take into account the environmental factors (overall health, education, lifestyle, support system, and socioeconomic status); together these define the genetically understood health needs of an individual. Therefore, they claim that it is vital to consider the self-defined racial/ethnic identity of patients in order to provide them with identical – though not equal – healthcare, because human beings are different.

In the case of Hungarian ethnic groups, for example, the homogenous racial/ethnic identity category of Caucasian does not address certain problems. The distribution of the cystic fibrosis gene  $\Delta F$  508 is such an example. In a study conducted by scientists in Debrecen, the authors claim that the F508del mutation is the most significant variant in Hungary with 61.2 % and it shows a decreasing north-to-south gradient in its distribution in the country (Iványi et al. 2015, 50). This means that other mutations are also prevalent in the population, and the diagnoses would be helped with further knowledge of the geographical ancestry of the individual.

In addition to this, one must note that population genetic studies that aim at mapping the diversity of certain diseases within various populations is very useful on a local level to shorten the time that is needed for diagnosing a given problem. Let us look at the following argumentation that points out differences between Roma, non-Roma, Hungarian, and non-Hungarian Caucasian populations to the West of Hungary, regarding the above detailed cystic fibrosis disease. What I want to emphasize from the quote below is the distinctions that the author makes regarding ethnic boundaries and the uncertain claim about the prevalence of the disease in Roma communities.

In our work, we noted that a high percentage of our patients have a certain mutation which is very rare in the international literature. This could mean that this mutation is a highly frequent one in Hungary, but it could equally mean that this is a mutation which is frequent in a Hungarian gypsy minority population – because we don't know the ethnic background of our patients. However, we have data about ethnic Hungarian patients regarding cystic fibrosis. We know that these are from ethnic Hungarians because the clinicians sent the samples that way. By the way, cystic fibrosis is not really prevalent in gypsy populations. So, we have two mutations, which are practically non-existent to the West of Hungary. I would say, where there are no Slavic populations. This is beautiful evidence of the mixture of ethnicities. This mutation occurs in 5 % of our patients, and this is zero in England, in Sweden, and Spain. And this is very important because it can help us to offer fast and cheap diagnoses for our Hungarian patients. Because we know that this exists in Hungarian patients, and in a diagnostic kit, which is composed in England – and let's say we use that – that is not included because it is not typical in that population (PI 20140210B).

The claim regarding the prevalence of two genetic forms of cystic fibrosis in Hungarian populations suggests that medically relevant ethnic boundaries cross state boundaries. A medically valid argument was put forward by the interviewee to create disease diagnostic kits that are relevant for the Hungarian and neighbouring populations' genetic make-up, since it would make diagnoses faster and much more precise. The argument supports, in my view, the idea of mapping the variations of different mutations for the same genetic disease in local populations in order to design diagnostic kits to treat patients effectively.

This argument stands for members of the Roma and Jewish groups as well, since their racial/ethnic diversity is also important when discussing the medical relevance of sharing certain problems. The dominant approach in researching racial/ethnic populations is connected to the works of Cavalli-Sforza (2000), who suggested analysing genetic data that is collected from communities defined by their shared geographical location, cultural behaviour, and linguistic practices. He argued that these factors determine the reproductive practices of community members and, hence, the gene-flow within the population. Regarding Roma diversity, three main ethnic groups reside in Hungary; these are the Vlachian, Romungro, and Beasi communities scattered across the country. These communities came to Hungary on various migratory routes, and they differ from each other culturally and linguistically. In addition to this, they are located in different geographical regions of the country. An example that helps to elaborate my point is the Beasi community: they came to Hungary from two directions: (1) from the south, particularly from Croatian-Slovenian regions and (2) from the east, from Romanian territories. Their cultural customs were different, they spoke different languages, and they settled in different parts of Hungary. The Beasi Roma who came from Croatian regions mostly settled in Baranya and Somogy counties, while those who came from Romania first settled in Szabolcs and Szatmár counties and then moved to the Tiszafüred region (Kemény 2005, 50–51). István Kemény, through accepting Katalin Kovalcsik's differentiation, identifies three ethnic groups within the Beasi ethnicity. These are the Mucsán, Argyelán, and Ticsán communities. Members of the Mucsán group live around the Hungarian-Croatian border, and their linguistic dialect still uses Croatian words. Members of Argyelán group speak a Transylvanian dialect (called Bánátian), and they also live in Baranya and Somogy counties, while the Ticsán communities came to Hungary through Szabolcs and Szatmár counties from Romania, and they live around Tiszafüred nowadays. This anthropological differentiation suggests that medical genetic problems could be very different for the members of the Beasi Roma communities living at a significant distance from each other and possibly mixing with non-Beasi Roma communities; but it still supports the idea that self-identified and precisely used identity categories could be medically beneficial.

If we choose to analyze concrete medical situations, wherein a quick and precise response is of crucial importance, the argument to use ethnic/racial markers



in the sampling and diagnostic process seems to further strengthen this position. In the case of bone marrow transplantation, for example, racial or ethnic ancestry is suggested to be valuable information. The interviewee quoted below is on the same theoretical footing as Neil Risch and his colleagues (2002) referred to above: in order to help patients to have an equally positive outcome one has to take into account the ethnic diversity of the population.

Gypsies are different genetically from the surrounding white Hungarian population, and in order to help them, we must analyse precisely their genetic background. For example, it is necessary to map gypsy bone marrow donors, because gypsy and white Hungarians are so different immunologically from gypsies that they cannot get bone marrow transplantation from Hungarians because they would die. In order to be able to treat them properly because of their increased risks we must do these genetic assessments. There is no discrimination in this (PI 20131119).

Here, the primary racial/ethnic differentiation happens through skin colour, and gypsy people are viewed as being isolated, surrounded by the majority white population without any intermixture.<sup>2</sup> This explanation stems from the fact that because gene-flow does not occur significantly, the biological difference regarding bone-marrow structure between a Roma and a non-Roma patient is significant enough to cause the death of the recipient of the transplant. In this case, because there are fewer bone-marrow donors among Roma individuals than among non-Roma, in order to help Roma patients who are waiting for bone-marrow transplantation and to shorten the waiting period, it is medically useful to create a bone-marrow donor bank in which the donated bone-marrow is from Roma people. This practice aims to counter unequal care. Another interviewee further argues that transplantation donors must be identical in the relevant genetic markers, otherwise the transplant will probably be rejected by the recipient's body. Race/ethnicity helps medical professionals to find acceptable donors from a more reliable pool of sources. This is because of the unique mutational events (founder effects) that took place in the bodies of people who belong to the same ethnic group, since they lived and travelled together across the same geographical landscapes.

In the case of bone marrow transplantation, donors mustn't be only approximately identical in order to be accepted by the recipient's body; it must match a lot of genetic details. This means that there may be genetic characteristics in the Roma population for which it is better for a Roma person to receive the transplant from another Roma. It will be identical with a higher safety margin. With this approach we have higher probability rates because of the founder-effects. In other words, if we need a donor, we had better look for the donor in the same ethnic community because this way we have a better chance of finding an identical match in a shorter time period. It is not possible to exclude the chance of finding a donor from the Caucasian population but we would need to analyse many more samples (PI 20140307).



However, when speaking about ethnic/racial boundaries, it is important to note that this standpoint does not exclude the possibility of finding a bone-marrow donor with identical markers from a different racial/ethnic community – it is only assumed that it would take more time to run into an exact match. This position does not create biologically grounded and divided races or ethnicities; according to this direction, it is possible to imagine that people who have been living in the same geographical area, who have similar dietary habits, but perhaps who have rarely chosen their reproductive partners from another ethnic community, would still be a match for bone-marrow transplantation for a racial/ethnic other.

Race or ethnicity in itself is not a sufficiently precise marker to draw any medical consequences. The following quote from one of my interviewees suggests a limited usefulness: genetic studies on ethnic/racial ancestry would suggest the use of these markers in medicine but with a restriction that would mandate the inclusion of geographical ancestry. This counters the view that skin colour is not a superficial marker; it rather states that because skin colour variation is the result of multiple genomic combinations, it is of no use for precise diagnosis in medicine.

[A]s I said, skin colour, and other superficial characteristics, are defined by multiple genes, and this disease is also defined by multiple genes. From a medical perspective, it is important to know the ancestry of a human community. I think it is important to do population genetic studies that can result in the ascertainment of disease susceptibility that is higher in a given geographically defined population than in another one (PI 20130328).

In this sense, skin colour is understood to be superficial, which means that population genetic studies are perhaps designed in a manner wherein race and ethnicity is considered, but without any information on geographical ancestry, disease susceptibility cannot be adequately defined. This approach entails that perhaps skin colour on the molar level acts as a dividing factor, thus we need molecular level information in order to provide medically precise diagnoses for ethnically different patients with the same genetic disease.

## 5. Difficulties of Racial Classification in a Clinical Environment

In the early 2000s as the Human Genome Project approached its final years, during a conference on June 26, 2000, President Bill Clinton evaluated the results and placed emphasis on the finding that humans share 99.9 % of their genome which renders racial differentiation genetically meaningless (Bliss 2012). This politically significant position was supported by the human geneticist Craig Ven-

ter, who said that they “have shown that the concept of race has no biological basis”, and only one year later, Francis S. Collins further emphasized that “those who wish to draw precise racial boundaries around certain groups will not be able to use science as a legitimate justification” (Bliss 2012, 1). Catherine Bliss, who is a sociologist of science, claims that it is observable globally that geneticists are trying hard to give new meaning to the concept of race on the genomic level. This racial turn in genomic thinking about the concept took place in the second half of the first decade of the new millennium: scientists are busy looking for medically applicable data regarding someone’s racial identity.

Genetic tests are useful on different levels and for different purposes. They are useful, for example, in gaining knowledge about an individual’s health prospects, they are useful for couples who want to know genetic data about their reproductive capacities, they are also useful for individuals to get medically relevant information about their newborn child, and genetic tests are useful on an epidemiological level to manage the healthcare of the population. The primary direction in which researchers began to work was toward epidemiological screening. Population screenings were first introduced in the United States during the 1960s. These first screenings were phenylketonuria (PKU) screenings, which were introduced over the course of the following ten to twenty years in countries that had systematically organized healthcare systems (Kosztolányi 2013, 70–77). This was the case with Hungary as well, where they were introduced in the 1980s, and since then, because of rapid biotechnological developments, compulsory screenings were supplemented with 25 other genetic problems and have been tested for since 2007, following the decree of the Healthcare Ministry 44/2007 (EüM Rendelet ...).

There are arguments put forward by researchers for designing screening protocols that target ethnic communities. Perhaps it is sufficient for this argument to name two racial/ethnic target communities with their respective genetic problems (here I rely on Kosztolányi 2013, 72–74). It was observed in the United States that sickle-cell anaemia is more prevalent in the members of African American communities than in non-African Americans, so this was integrated into the screening programs of several states. In a similar manner, it is argued that cystic fibrosis (CF) is a disease that occurs more frequently in Caucasian populations than in others. Particularly the  $\Delta F508$  mutation is responsible for roughly two-thirds of the occurrences. In these cases, it is argued that it is both rational and economically beneficial to design racially/ethnically sensitive screenings that would help these communities to tackle these genetic issues. In the development of genetic screenings in Hungary, biological averages were used to define the thresholds of acceptability.

In Hungary every newborn is screened for certain deficiencies. It doesn’t matter if the newborn is German, Dutch, Russian, or Ukrainian; this is a compulsory screening for

every newborn. Blood samples are collected on a filter paper and half of the country's samples are sent to Szeged, and the other half to Budapest. Only those will be notified whose results diverge from the norm. This is not a diagnosis, this is a precaution. These people are requested to return to the clinic and subjected to a focused examination. It is possible to set up a diagnosis only after the examination. There is absolutely no distinction on ethnic grounds (PI 20121018).

The whole population was studied to establish mean values for various problems, such as PKU, to be able to give meaningful medical answers to those who are affected by the disease. It is important to note, however, that today there are arguments provided by researchers, for example about CF, that there are various forms of cystic fibrosis mutations but different populations are affected by only a given set of these. And certainly, this can be true for various ethnic groups within a larger population, so the perspective to screen a given community with the same parameters may well be imprecise. However, the question remains: how do ethnic or racial identities best serve the medical needs of community members?

Here, another relevant question comes up regarding the medically-guided distinction of the Hungarian population on genetic grounds. Roma people are mainly referred to in the literature as Asian, regarding their ancestry. Recent studies argue that the ancestors of Roma people presently living in Europe can be traced back to their ancestral geographical origins in Northwestern India (Pamjav et al. 2011; Martínez-Cruz et al. 2016). In opposition to this position, other geneticists argue that this type of differentiation is not tenable or useful.

Geneticists do not take Roma people to be an Asian group; with this mindset we Hungarians could be Asians, too. I don't know about any genetic abnormality which has a higher frequency in Roma communities than in non-Roma communities. According to our present knowledge from the perspective of diagnostics, there is no difference between a Roma and a non-Roma: we must take them to be of Caucasian ethnicity. It would be an exaggeration to consider them to be Indians. In everyday screening practice, there is no difference between the white population and the Roma population (PI 20121210).

The counter argument centres on the tacit linguistic, anthropological, and historical knowledge that Hungarians migrated to their present geographical area from Asia. Despite this accepted view, ethnic Hungarians are classified as Caucasians or Europeans. Importantly, there is no significant genetic difference regarding disease prevalence in the Hungarian Roma population that the above geneticist knows of. And this also entails that there is no official disease panel suggested by the Hungarian Human Genetics Society that would recommend racially focused screenings. This shows us the untidiness of boundaries that genetic discourse creates for white Hungarians and non-white Roma Hungarians as possible identification schemes, because these are still based on classic racial markers such

as skin colour or hair texture when it is widely acknowledged that there are no biological grounds for racial differentiation (Raskó 2015, 147–148). However, this entails, as Raskó (2015) argues, that there are mutations, which accumulate in various groups who intermarry for a long time, and this prompts researchers to suggest further sensitivity in screening and providing diagnoses. This perspective is explained below with a joint problem called Bechterew's syndrome that is perceived to be more common in the members of Roma communities.

There can be biological differences regarding ethnic belonging. Let's take an example: in gypsies the occurrence of Bechterew-syndrome is much higher than in the non-gypsy population. So, when a gypsy young man comes and tells us that his waist hurts him, this is the first thing we have to think about because almost every second gypsy man will have this problem. And this is not racism. This is an empirical fact. And it is right to think about why this has developed this way, it is right to think about it, however this is how it is (PI 20130311).

The initial symptoms of Bechterew's syndrome are lower back pain or back pain that usually occurs during the night with changing intensity but it can worsen in the morning or with inactivity (Brent 2018; Sáfrány 2010). Its occurrence in populations is 0.1–1.4 % and it is more prevalent in males than in females.

The precise cause of the syndrome is unknown, but it has been shown that familial transmission of the gene is frequent. In addition to this observation, many point out that the presence of the HLA B27 allele can be detected in most pathological cases. However, this HLA B27 allele can most likely only be held responsible for 20 to 30 % of risk factors that cause the disease (Sáfrány 2010, 13). Enikő Sáfrány, a medical geneticist, studied nine single-nucleotide-polymorphisms of the IL27R gene. The IL-23R is a transmembrane protein that can be detected on the short arm of the first chromosome (1p31.3) (Parham 2002, cited in Sáfrány 2010, 6). Sáfrány found that certain SNPs are higher in frequency in the population that has the disease in comparison to the control group. The rs11805303 T allele, rs1004819 A allele, the rs10889677, and the rs2201841 SNPs are detected to be more frequent in populations that exhibit the disease. She claims that in the case of the IL27 R haplotype, in connection to the development of the syndrome, the ATCACAG and ATCACAA haplotypes consisting of the rs1004819, rs7517847, rs7530511, rs10489629, rs2201841, rs10889677, rs11209032 variants were understood to be susceptibility factors; while in the case of the patients who carried the B27 allele, only two haplotypes showed connection with the disease. The GGCATCG haplotype was proven to be a defense factor, while the ATCACAA haplotype was understood to be a risk factor in the examined Hungarian population (Sáfrány 2010, 30–31). In the papers that were published by E. Sáfrány et al. (2009), and later by Sáfrány herself (2010), regarding this problem, neither racial nor ethnic categories were

mentioned by researchers to classify their subject material. However, it is possible to make further distinctions by using racial/ethnic categories regarding the frequency of the disease in various communities.

Investigations aiming to understand the links between various immunological diseases and the above-mentioned SNP variants of the IL23R gene were initiated by Richard Duerr and his colleagues (2006); in their study, they compared the IL23R gene variants in samples taken from Jewish and non-Jewish patients. They stated that there is significant correlation between the function of the gene variants in the development of Crohn's disease. Similar studies have been conducted across the world. Researchers examined various SNPs regarding the IL23R gene mutations that can be relevant to Crohn's disease in Brazilian populations, in New Zealanders, in Koreans, in Chinese, and in Germans (listed in Magyari et al. 2014, 150–151). This is the direction taken by Hungarian researchers when they began investigating the prevalence of the IL23R SNPs in ethnically identified samples. Magyari and her colleagues compared the IL23 receptor gene variations in Roma and Hungarian population samples.

[We] examined five susceptible, one protective and two neutral variants of the IL23R gene, and found significant increased genotype and allele frequencies in rs10889677, rs1004819, rs2201841, rs11805303, rs11209032 in Roma samples compared with the Hungarian population, and the rs7517847 showed significantly decreased genotype and allele frequencies in the Roma samples compared to the Hungarians (Magyari et al. 2014, 151).

Because various studies pointed towards the correlation between the susceptible variants of the gene and the disease, their finding implies, they argue, that hypothetically Roma people are more prone to develop the Bechterew's syndrome than non-Roma Hungarians.

In the above discussed case, medical genetic findings are paramount for the better public health for both Roma and non-Roma Hungarian citizens. The question is how one understands it and how citizens are capable of using the information. I would argue against the starting position of my interviewee, who stated that when a Roma male individual with lower back pain enters his office, they (the medical professionals) must consider the possibility of Bechterew's syndrome. It would be misleading for both parties to consider Bechterew's syndrome only when racial/ethnic identification matches the description of the patient and the perception of the doctor. Those who are non-Roma but similarly carry the gene variants that make them more susceptible to develop the disease are left out in this perspective. According to Sáfrány (2010, 29), 47 % of the healthy control group had the same genetic variant, namely the presence of the rs11805303 T allele in one instance, and also the rs1004819 A allele variant was more frequent in groups who had the disease than in the healthy control



groups. With these results, geneticists argue that (Sáfrány et al. 2009; Sáfrány 2010; Magyari et al. 2014), because of the difference in frequency of the variant between Roma and non-Roma carriers, most probably Roma people are more susceptible to Bechterew's syndrome. This information can work to the advantage of both Roma communities and health professionals, but only on the condition that they are careful to screen non-Roma patients with similar symptoms for the same genetic variants. And with this move the work that geneticists do can be seen as a contributing force in re-thinking the divide between Roma and non-Roma Hungarian communities. Members of both vaguely defined communities carry these variants, and the only medically significant difference is the fact that one in one of these groups' carriers is more frequent.

Following on from this, two problems arise regarding the use of race/ethnicity. The first problem lies in the difficulty of identifying someone's ethnicity, and the second problem is the precise application of said knowledge. It is important to address this issue, because it is possible that an individual cannot precisely define their racial or ethnic ancestry. This can be for various reasons but let us take one: incomplete ancestral information was passed down across generations. In this case, what is the best solution? And how can this approach accommodate the individuals' freedom to choose their ethnic or racial identity according to their social circumstances? Let us say a white immigrant from Africa who lives in a European country permanently, perhaps even without planning to return to their country of origin, chooses to identify as White African. Immediately, a similar question emerges: if geneticists use stratification more and more, then to what extent should they rely on folk race/ethnic categories? In what ways can we secure precise information flow regarding these social categories in medical settings when we must ensure precise diagnoses? In order to be inclusive, the medical response must begin on the biological grounds that there are different genetic mutations that must be identified, since these are crucial for successful treatment. Ethnic/racial markers understood by either patients or health professionals in a superficial manner can lead the diagnosis astray. Let me use an example of a patient suffering from cystic fibrosis. CF is understood primarily to be a Caucasian problem, one that largely affects white people, and as such this understanding directs the medical gaze of health professionals along racial identities.

Arguments to use racial/ethnic markers put forward by geneticists include time efficiency in a clinical setting, where the patient's interest is to find medical solutions to their problems as soon as possible, hence medical professionals need reliable markers that efficiently guide the therapeutic process. In addition to this criterion, it is often argued that it is simply not economically efficient to screen a patient for everything, since it is a costly procedure, and it is also inefficient for the state for the same reason. Therefore, many suggest that racially or ethnically different populations be screened for health problems that are more



prevalent in specific communities. Dorothy Roberts discusses an exemplary case where the racial bias of healthcare professionals caused harm instead of fast and efficient treatment (2011, 99). Roberts tells the story of “Lela, who was described by doctors as a ‘2-year-old black female with fever and cough’ and later as a ‘4-year-old with another pneumonia,’ as she continued to suffer from an unshakable respiratory ailment” (Roberts 2011, 99). After six years of continuous imprecise diagnosis, at the age of eight her chest X-ray was read by a radiologist who identified her condition as cystic fibrosis. The radiologist did not have any previous knowledge about her; Lela was not classified as a black patient by this radiologist; it was only the X-ray image that allowed the doctor to give a racially unbiased diagnosis of her respiratory problem. In Lela’s case, it is highly probable that if she had been white, she would have been diagnosed early on with CF and treated correctly. Roberts emphasizes that because of the racial lenses that crude statistical data provide about various racially or ethnically significant diseases, medical professionals mistreated Lela because they interpreted her racial difference in a way that was translated into the clinical practice that CF is a predominantly white disease, which means that black patients very rarely suffer from it. Thus, her doctors never considered checking her for CF despite the symptoms that she had shown during her physician office visits.

## 6. Conclusion

One of the turning points in medical genetic studies was the completion of the Human Genome Project. Its results have changed our thinking about the possible applications of genetic knowledge in medicine. One of the key fields where it had a significant impact was epidemiology. The knowledge gained made it possible and ethically necessary to address population-based health problems with the tools of genetics. Thus, partially, racially/ethnically identified populations became the focus of such studies, in order to provide equal healthcare for everyone. Furthermore, it became widely accepted that in order to provide equal healthcare, it was necessary to map population differences in any social context. This approach embraced the idea that economic marginalization, racial discrimination, and gender inequality contribute to diverse health issues and unequal access to healthcare. Thus, it became mandatory to find ways of tackling these empirical problems. Social categories, such as race and ethnicity, might provide useful guidelines both for clinicians to reduce the time that is needed for a precise diagnosis and to offer medical services, and for patients on how to change their lifestyle in order to better attend to their health. However, it is important to be vigilant about the social processes that reduce certain diseases to race- or ethnicity-based problems. An essentialist understanding of race/ethnicity in medicine can constrain the medical gaze and thus interfere with the diagnosis and the treatment process.

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## Notes

- <sup>1</sup> Identical treatment is a term suggested by Risch and his colleagues (2002) to explain that different social groups have different treatment responses, therefore, they argue, treatments must be adjusted to their specific needs.
- <sup>2</sup> There are sociological and anthropological studies that explain sensitively the social immobility of Roma people living in segregated areas (see for example Rozgonyi-Horvath 2018).

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## Selected Demographic Aspects of Contemporary Migration Trends between Croatia and Austria

After Croatia's accession to the European Union, a trend of increased emigration of Croatian citizens outside the borders of Croatia was noticed. The aim of this paper is to map selected demographic characteristics of contemporary migration trends between Croatia and Austria in the period from 2013 (Croatia's accession to the European Union) to 2020. The paper uses classical demographic statistical-mathematical analytical methods in combination with GIS analysis. The paper is based on official Austrian statistics with a focus on Croatian citizens. The spatial framework of the research is the state level and the Austrian NUTS 3 regions (Gruppen von Gemeinden). According to Austrian statistics, a total of 14,011 Croatian citizens emigrated from Austria to Croatia, and a total of 33,127 Croatian citizens immigrated to Austria from Croatia, which means that Croatia recorded a negative overall migration balance compared with Austria (–19,116 Croatian citizens). As a result, Croatia lost an average of approximately 2,730 people a year due to the emigration of Croatian citizens to Austria.

**Keywords:** Austria, European Union, Croatia, Croatian citizens, migration.

## Izbrani demografski vidiki sodobnih migracijskih gibanj med Republiko Hrvaško in Avstrijo

Po vstopu Republike Hrvaške v Evropsko unijo je moč opaziti povečano izseljevanje hrvaških državljanov izven meja Republike Hrvaške. Namen prispevka je prikazati demografske značilnosti sodobnih migracijskih gibanj med Republiko Hrvaško in Avstrijo v obdobju od leta 2013 (pristop Republike Hrvaške k Evropski uniji) do leta 2020. V prispevku so uporabljene klasične metode demografske statistično-matematične analize v kombinaciji z analizo GIS. Prispevek temelji na uradnih avstrijskih statističnih podatkih, poudarek raziskave pa je na hrvaških državljanih. Prostorski okvir raziskave zajema državno raven in avstrijske statistične regije NUTS 3. Po avstrijskih statističnih podatkih se je iz Avstrije na Hrvaško izselilo skupno 14.011 hrvaških državljanov, iz Hrvaške v Avstrijo pa se je priselilo kar 33.127 hrvaških državljanov, kar pomeni, da je Hrvaška v primerjavi z Avstrijo zabeležila negativen migracijski saldo (–19.116 hrvaških državljanov). Z izseljevanjem hrvaških državljanov v Avstrijo je Hrvaška v povprečju izgubila približno 2.730 prebivalcev na leto.

**Ključne besede:** Avstrija, Evropska unija, Hrvaška, hrvaški državljani, migracije.

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## 1. Introduction

External migration implies spatial mobility with temporary or permanent emigration outside the state borders (Nejašmić 2005). Emigrants can be generally divided into legal emigrants, illegal (undocumented) emigrants, refugees, and asylum seekers (Weeks 2020). Weeks (2020) states that emigration can involve an individual and/or a family, and ghost towns are not necessarily an indicator of community disappearance, but resettlement. However, in the Croatian case, emigration is largely negatively contextualized, as the local population moves outside Croatia.

Croatia is traditionally an emigrant country, and almost four million Croats live around the world. Emigration of Croats outside the national borders, influenced by various pull and push factors, has been facilitated by the removal of previous administrative barriers, with the last emigration wave beginning with Croatia's accession to the European Union in 2013 and continuing until today. By 1 July 2020, i.e., seven years after Croatia's accession, Austria abolished the work permit requirement for Croats as well as all forms to be submitted when applying for a job, resulting in faster and easier employment in Austria. On that date, the labour market was liberalised and employment in Austrian companies, with Austrian and Croatian employers, became easier. Some Croatian citizens welcomed the removal of barriers to employment with enthusiasm and, accordingly, a new major wave of emigration of Croatian citizens to Austria is expected, especially since Austria is geographically close to Croatia.

Due to the emigration of young adults in the fertile age, mostly highly educated, but also people with professional occupations, Croatia is facing worrying demographic problems with far-reaching consequences, primarily reflected in the demographic structure of the population. Migrations affect both birth and mortality rates, as well as the population structure (demographic, economic, social, ethnic and other). The emigration of young adults causes negative demographic trends, natural depopulation, and an increased share of the elderly population (Peruško 2016). At the academic level, a recurring problem for migration research is the significant disparity in the data presented by Croatian official statistics and those of destination countries.

## 2. Research Methods

The paper focuses on Croats who emigrated to Austria, and not on the Burgenland Croats who hold the status of an official minority in Austria. In Austria, migration statistics are based on data from registrations and de-registrations obtained from the Central Register of Residence (CRR). The Austrian statistics of migration and population since 2002 are based on the same data source and thus represent consistent statistics. Migration and population statistics include



all persons who have registered their residence in Austria for at least 90 consecutive days.

Migration statistics in Austria indicate all changes of residence within Austria, from abroad to Austria or from Austria to abroad, since reporting a change of residence is required by law. The 1995 Residence Act defines the basic concept of residence, and migration statistics in Austria since 2002 consist of quarterly data obtained from the CRR. The registration offices enter the relevant data in the CRR, while the Federal Ministry of the Interior submits all applications and cancellations processed in the CRR to Statistics Austria. Therefore, the authors use Austrian statistics data in the desk-analysis method, which entails the analysis of available statistical data. This type of analysis enables the research of possible social changes and behaviours in certain societies.<sup>1</sup>

The GIS analysis was also used, based on the application of GIS as a research tool for the calculation and visualization of data. The authors vectorised the Austrian regions' borders, created a GIS database, and calculated the spatial relationships of migration changes in statistical tools. The classification and spatial statistic methods in the GIS environment were applied.

### 3. Theoretical Framework, Research Subject and Objectives

Croatia has traditionally been an emigrant country whose population has been displaced around the world due to economic and/or socio-political circumstances and motives that have consequently been a strong repressive factor and cause of emigration (Mesarić Žabčić 2012; 2014). Migration is also a very important determinant of the population of Croatia (Živić et al. 2005). The problem of population migration is not faced by Croatia alone but is a global and transnational issue (Perić Kaselj et al. 2021). Migration is not a simple mechanical phenomenon that takes place in society, but rather a complex social process full of dynamics and demographic factors (Lajić 2002).

In recent years, negative trends in the demographic development of Croatia (depopulation, natural decline, the ageing process, etc.) have gained dramatic proportions, ranking Croatia among the European countries with the most unfavourable demographic processes. A possible cause of this situation is the extremely negative migration balance, i.e., the growing number of emigrants from Croatia compared to the number of immigrants (Pokos 2017).

The last big wave of emigration began with the global economic crisis in 2008 and intensified with Croatia's accession to the European Union in 2013. It is perhaps the most unfavourable so far as it takes place in a context of reduced birth rates, natural decline, total depopulation, and rapid ageing. The true extent of contemporary and past emigration is not known as many residents do not

report a change of residence before leaving, although they are obliged to do so under the 2012 Residence Act (Pokos 2017).

For every country, human capital is the most valuable capital. Without population, there is no progress and development. The three basic demographic processes are fertility, mortality, and migration. By close analogy, we can say that Croatia is characterized by low birth rates, demographic ageing, and large emigration (Ivanda 2017). These conclusions of demographers were taken into account in this study of contemporary migration trends between Croatia and Austria. Consequently, the lack or shortage of population, especially the younger generations, leads to the destabilization of the basic systems of the state: labour force, pension, health, education, and financial system (Lajić 2007; Hollifield 2012; Martin 2015). Globalization, availability of information, and the legal and organizational ease of movement all make people move faster and easier. The competition among the population, which can be viewed as labour, consumer or human capital, now involves all EU countries and is likely to increase in the future (Mesarić Žabčić 2021). After Croatia's accession to the EU in 2013, a large wave of emigration began that is difficult to stop and continues today. As the theory of Massey's law on migration claims, international migration is much harder to stop than to start (Massey et al. 1993).

As a member of the EU, Austria, due to its proximity to Croatia, is very attractive as a country of work, higher standards, and better legal order.

Throughout history, a whole range of push and pull factors have created and dictated the emigration of the population. High unemployment, an unfavourable economic situation, the inability to find a job in one's profession, the inability of promotion, and the inability to solve the housing situation are just some of the many personal, psychological, and even economic factors triggering the decision to emigrate. People are attracted by the opposite factors and thus move to countries/societies that offer everything that, generally speaking, implies a satisfactory standard of living (Čizmić & Živić 2005; Akrap et al. 2017).

Nowadays, corruption and nepotism are often highlighted as motives for emigration (Jurić 2017), while the decline in total employment, long waits before finding employment in one's profession, and the impossibility of permanent employment (Župarić Ilić 2016) continue to feed a negative demographic trend with major consequences for the basic Croatian systems (Bališa 2019). Emigration from Croatia partly reduces the pressure on the labour market as it reduces the number of unemployed in Croatia, yet it also reduces labour supply, which is likely to have long-term negative economic effects with lower GDP and a certain collapse of the pension system as we know it today.

Labour market conditions directly affect migration. According to Lowry's (1966) migration model, the level of employment and income has a direct impact on migration. People move out of low-income and high-unemployment

areas to areas with high incomes and low levels of unemployment (Lowry 1966, cited in Wright & Ellis 2016). In addition to the economic reasons for migration, the latter can also be triggered by certain political, social and demographic pressures (Cox 1976), which can certainly be linked to the situation in Croatia where emigration is associated with reduced job opportunities (especially in rural areas), but also to the general situation within the society (insecurity, corruption, etc.). In Croatia, especially in rural regions, there is a trend of selective emigration (Nejašmić 2005; Lajic 2007; Živić et al. 2005) that contributes to negative demographic trends. This is confirmed by the new 2021 census, according to which all Croatian counties (NUTS 3 regions) recorded a decrease in population in the last intercensal period (2001–2021) (total decrease of –396,360 people), which confirms the prevalence of total depopulation).<sup>2</sup>

According to official data from the Austrian Statistical Office,<sup>3</sup> a total of 8,451,860 people were registered in Austria in 2013, of which 7,447,592 were Austrian citizens (88.1 %) and 1,004,268 were foreign citizens (11.9 %). Regarding the total number of foreign citizens, the citizens of the European Union (EU27, excluding Austria) accounted for 465,744 citizens (46.4 % of foreign citizens), while foreign citizens from other European and world countries accounted for 538,524 citizens (53.6 % of foreign citizens). Among foreign nationals from other EU countries recorded in Austria in 2013, Germany (33.9 % of foreign nationals from the EU), Croatia (12.6 % of foreign nationals from the EU), and Romania (11.4 % of EU foreign nationals) stood out.<sup>4</sup>

Seven years later, in 2020, a total of 8,901,064 inhabitants were recorded, of which 7,414,841 were Austrian citizens (83.3 %) and 1,486,223 foreign citizens (16.7 %). Regarding the total number of foreign citizens, citizens of the European Union (EU27, excluding Austria) accounted for 757,420 citizens (51.0 % of foreign citizens), and foreign citizens from other European and world countries accounted for 728,803 citizens (49 % of foreign citizens). Among the foreign nationals recorded in Austria in 2020, Germany (26.4 % of foreign EU nationals), Croatia (11 % of EU foreign nationals) and Romania (16.3 % of foreign citizens from the EU) (Table 1) stood out again.<sup>5</sup>

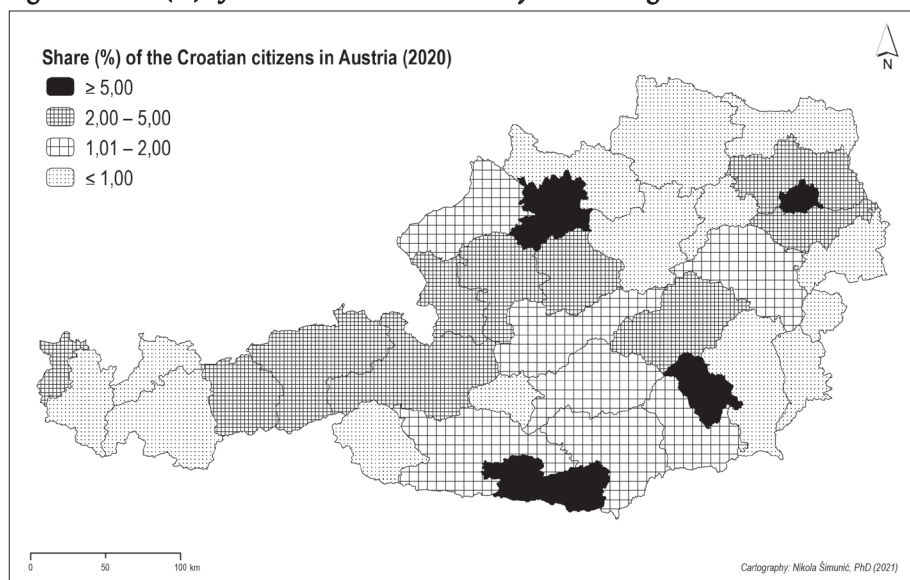
The NUTS regionalisation implies the analysis of the territory of the EU member states by statistical regions of different levels. The basic distinctive criterion is the number of inhabitants, resulting in three NUTS levels. According to these criteria, in Austria, there are three NUTS 1 regions (groups of federal states, *Gruppen von Bundesländern*), nine NUTS 2 regions (federal provinces, *Bundesländer*), and thirty-five NUTS 3 regions (groups of municipalities, *Gruppen von Gemeinden*).

*Table 1: Population of Austria by citizenship (selected countries) in 2013 and 2020*

Citizenship	2013	2020	Population change 2013–2020 (%)
Austrian	7,447,592	7,414,841	−0.44
Foreign total	1,004,268	1,486,223	47.99
Belgian	1862	2653	42.48
Bulgarian	14,144	32,528	129.98
Cypriot	125	259	107.20
Czech	10,232	14,182	38.60
Denmark	996	1230	23.49
Estonian	385	590	53.25
Finnish	1301	1721	32.28
French	6869	9011	31.18
Greek	3695	7393	100.08
Croatian	<b>58,619</b>	<b>83,596</b>	<b>42.61</b>
Irish	1058	1800	70.13
Latvian	1045	1761	68.52
Lithuanian	1086	1652	52.12
Luxembourgish	634	1187	87.22
Hungarian	37,004	87,516	136.50
Maltese	74	122	64.86
the Netherlands	7498	9739	29.89
German	157,793	199,993	26.74
Polish	45,965	64,429	40.17
Portugal	2260	3989	76.50
Romanian	53,261	123,459	131.80
Slovak	25,333	43,621	72.19
Slovene	9592	21,441	123.53
Spanish	4272	7901	84.95
Swedish	2810	3157	12.35
Italian	17,831	32,490	82.21
EU	<b>465,744</b>	<b>757,420</b>	62.63
Other foreign	538,524	728,803	35.33
TOTAL	<b>8,451,860</b>	<b>8,901,064</b>	5.31

Source: STATISTIK AUSTRIA 2022a (author’s calculations).

**Figure 1: Share (%) of Croatian citizens in Austria by NUTS 3 regions in 2020**



Source: STATISTIK AUSTRIA 2022a; GISCO 2020.

Observed through the prism of the geographical distribution of the share of Croatian citizens by Austrian NUTS 3 regions, the largest share of Croatian citizens (2020) was recorded in the regions of Wien (22.67 %, i.e., 23,128 Croatian citizens) and Graz (11.25 %, i.e., 9,406 Croatian citizens) (Figure 1).

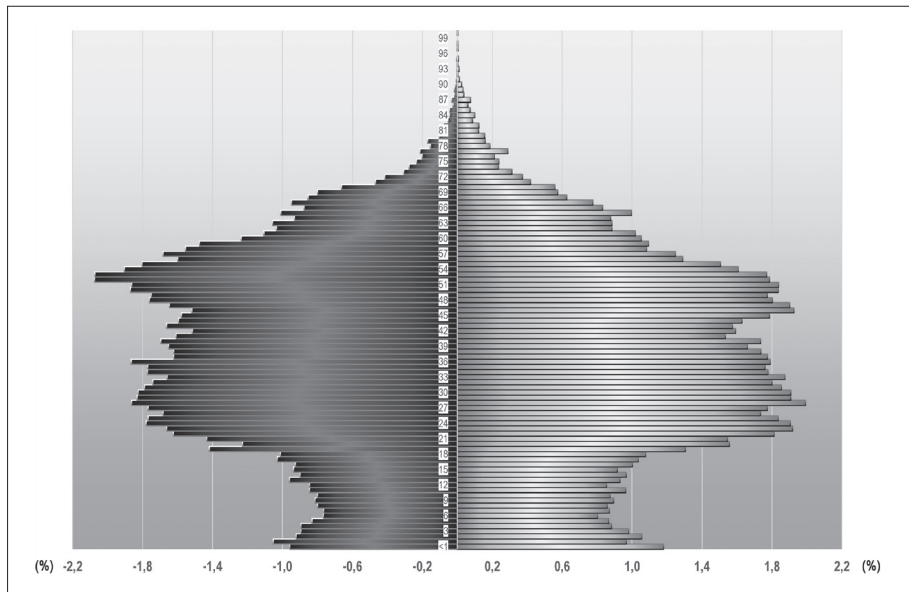
The age-sex structure of the population reflects the composition of the population by age and sex and is a good indicator of the current state of the population and a predictor of future trends in population development. According to Austrian statistics on Croatian citizens, it is possible to create an age and sex pyramid of Croatian citizens in Austria (2020) and analyse it.

It should be kept in mind that the age and sex pyramid shows the recent age and sex composition of Croatian citizens in Austria and is mainly the result of the migration of Croatian citizens from Croatia to Austria on the one hand, and the dynamics of losing Croatian citizenship on the other, which is regulated by Austrian legal provisions.<sup>6</sup>

The age-sex pyramid (constrictive pyramid) shows a prevalence of the elderly population (working contingent) (Figure 2).

Most often, according to age, the population is divided into 3 cohorts: young (0–14 years of age), mature (15–64 years of age) and old (65 and older). In 2020, Austria recorded 11,259 Croatian citizens in the young category (13.47 %), 65,705 in the mature category (78.60 %), and 6,632 in the old category (7.93 %).

*Figure 2. Age-sex pyramid of Croatian citizens in Austria in 2020*



Source: STATISTIK AUSTRIA 2022a.

The fact is that at management levels in the countries of immigration, immigrants (especially highly educated ones) are viewed from the perspective of their potential contribution (in terms of intellectual and professional competencies) to the society they immigrate to (Hercog 2019). A similar process of brain drain, i.e., emigration of the highly educated labour force, was recorded in neighbouring Slovenia (Josipović 2020).

Long-term emigration limits economic growth considering that in most cases the ones who emigrate are younger people at fertile age who are also the greatest contributors in the sense of payment of taxes and health and pension contributions (Šterc 2016; Mesarić Žabčić 2021).

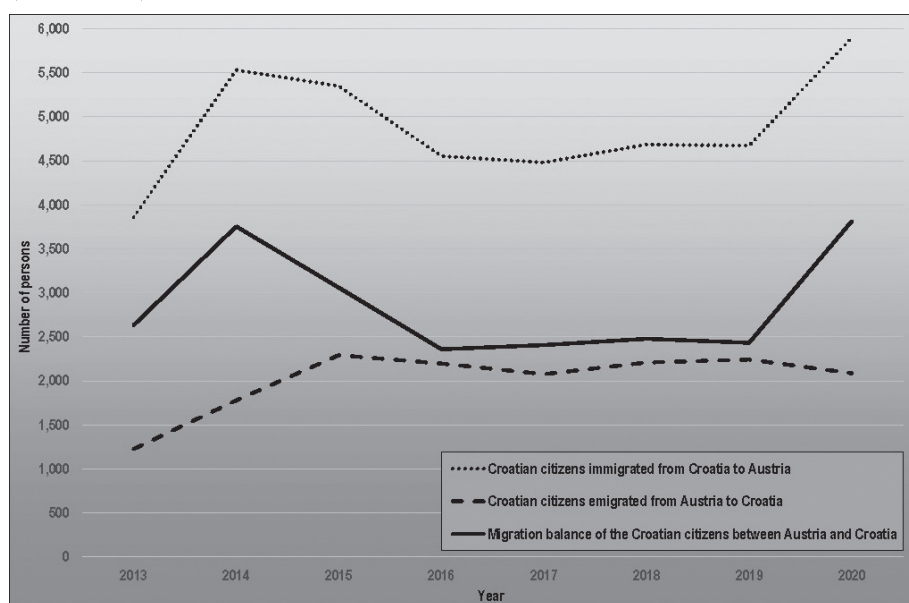
#### 4. Selected Features of Migration Movements of Croatian Citizens between Croatia and Austria (2013–2020)

According to Austrian statistics, a total of 39,025 Croatian citizens immigrated to Austria from Croatia (2013–2020), while 16,096 Croatian citizens emigrated from Austria to Croatia. Thus, the migration balance of Austria compared with Croatia (in terms of immigrated Croatian citizens) was positive and amounted to 22,929 persons. On average, in the observed period, about 4,900 Croatian



citizens a year immigrated to Austria, while about 2,000 Croatian citizens emigrated from Austria to Croatia, which means that Croatia lost on average about 2,900 Croatian citizens every year. Croatia is deemed a less developed country in terms of economy and population and is more prone to emigration in the context of globalisation processes, especially after EU accession which sees an increased emigration of the able-bodied population (Jurić 2017). The largest group of potential emigrants (migration potential) consists of those who are dissatisfied with the economic situation in the country and believe they can capitalise on knowledge in foreign markets (Božić & Burić 2005).

**Figure 3: Migration movements of Croatian citizens from Croatia to Austria and vice versa (2013–2020)**



Source: STATISTIK AUSTRIA 2022b.

With Croatia's accession to the EU, the number of registered Croatian immigrants from Croatia to Austria increased by 43.4 % in the first year of membership. After that initial wave, the immigration of Croatian citizens from Croatia to Austria decreased in the following years and stabilized at around 4,700 people a year. In 2020, the immigration of Croatian citizens from Croatia to Austria intensified. On the other hand, the emigration of Croatian citizens from Austria to Croatia (known as return migration) increased until 2015 when it stabilized at about 2,200. It can be assumed that these are people who may not have found adequate employment in Austria or have completed their short-term (perhaps study) stay there and returned to Croatia. Accordingly, the positive (for Aus-

tria) migration balance grew until 2014, then decreased and stabilized at around 2,400 people a year, and later increased again (Figure 3).

The age-sex structure of immigration/emigration is a very important aspect because it can contribute to the immigration area (immigration of the younger population) and be very unfavourable for the emigration area (emigration of the bio-reproductive base), but also (less often) vice versa. Since the population is most often divided into young (up to 19 years of age), mature (20–64 years of age) and old (65 and older) (Nejašmić 2005), it is possible to identify possible structural changes in migration.

In the observed period (2013–2020), 7,190 young people (18.42 %), 31,194 mature people (79.93 %) and 641 old Croatian citizens (1.64 %) immigrated to Austria from Croatia. It is interesting to note that among mature Croatian citizens, younger age groups (especially 20–24 years of age) prevailed, which shows that a significant part of the emigration wave from Croatia to Austria consists of students and job seekers. Among the Croatian citizens immigrating to Austria (2013–2020), there were 22,408 men (57.42 %) and 16,617 women (42.58 %). Persons of mature age prevailed both among male (82.31 %) and female immigrants (76.73 %).

**Table 2: Immigrant and emigrant Croatian citizens on the route Austria–Croatia (2013–2020)**

	Male						
	0–19		20–64		65 +		Total
	aps.	rel.	aps.	rel.	aps.	rel.	
Immigrants	3709	16.55	18,443	82.31	256	1.14	22,408
Emigrants	685	7.00	8498	86.78	609	6.22	9792
	Female						
	0–19		20–64		65 +		Total
	aps.	rel.	aps.	rel.	aps.	rel.	
Immigrants	3481	20.95	12,751	76.73	385	2.32	16,617
Emigrants	583	9.25	5197	82.44	524	8.31	6304
	Total						
	0–19		20–64		65 +		Total
	aps.	rel.	aps.	rel.	aps.	rel.	
Immigrants	7190	18.43	31,194	79.93	641	1.64	39,025
Emigrants	1268	7.88	13,695	85.08	1133	7.04	16,096

Source: STATISTIK AUSTRIA 2022b (Author’s calculations).

## 5. Migration Movements of Croatian Citizens between Croatia and Austria (2013–2020) at the Austrian Regional (NUTS 3) Level

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The regional analysis of the migration of Croatian citizens on the Austria–Croatia route was conducted at the Austrian NUTS 3 level (35 statistical regions). Persons with Croatian citizenship and Croatian descent were taken into account. These persons are not necessarily Croats by nationality, that is, they are not necessarily born in Croatia.

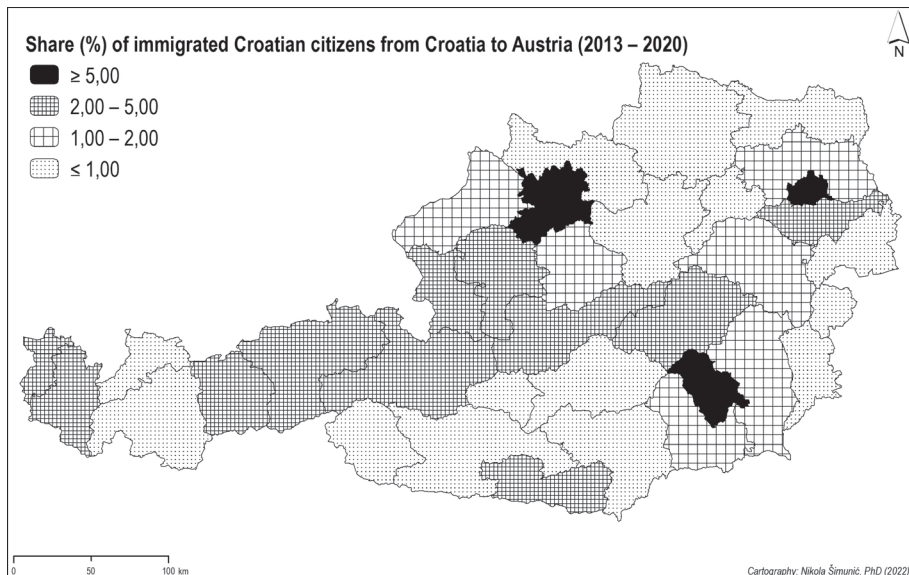
In the period 2013–2020, all Austrian NUTS 3 regions recorded a positive overall migration balance of Croatian citizens with Croatia.<sup>7</sup> Some NUTS 3 regions recorded a more prominent total migration balance of Croatian citizens with Croatia, such as the NUTS 3 regions of Vienna (positive migration balance +5,359 persons; 23.37 % of the total positive migration balance for Austria compared with Croatia), Graz (positive migration balance +3,541 persons; 15.44 % of the total positive migration balance for Austria compared with Croatia) and Linz-Wels (positive migration balance +2,567 persons; 11.20 % of the total positive migration balance for Austria compared with Croatia), and some recorded a less prominent total migration balance of Croatian citizens from Croatia, such as the NUTS 3 regions of Weinviertel (positive migration balance +15 people; 0.07 % of the total positive migration balance for Austria compared with Croatia), Mittelburgenland (positive migration balance +32 people; 0.14 % of the total positive migration balance for Austria from Croatia) and Waldviertel (positive migration balance +37 persons; 0.16 % of the total positive migration balance for Austria from Croatia).

According to Austrian statistics (2022), most of the previously mentioned 39,025 Croatian citizens immigrated from Croatia to the NUTS 3 regions of Vienna (28.06 %), Graz (14.75 %) and Linz-Wels (9.64 %). In the same period (2013–2020), as many as 20,472 Croatian citizens from Croatia moved to the mentioned NUTS 3 regions. The NUTS 3 region of Vienna consists, at the lower level of the regional breakdown, of 23 municipalities. Most of the Croatian citizens were recorded in the southern and central parts of the region/city. These areas are the municipalities of Favoriten (2,971 Croatian citizens; 12.85 % of Croatian citizens of the region) and Ottakring (1,920 Croatian citizens; 8.30 % of Croatian citizens of the region).

On the other hand, the lowest number of Croatian citizens immigrating from Croatia to Austria (2013–2020) was recorded in the NUTS regions of Weinviertel (0.12 %), Osttirol (0.16 %) and Mittelburgenland (0.20 %). In the same period, only 186 Croatian citizens from Croatia moved to the mentioned NUTS regions. An insight into the structure of the population at the micro-level (2020) shows that, out of only 163 Croatian citizens living in the NUTS 3 re-

gion of Osttirol, most of them were recorded in the eastern part of the region. This is the municipality of Lienz (117 Croatian citizens; 71.78 % of Croatian citizens in the region), with only 11 municipalities (or 33 in the NUTS 3 Osttirol region) having 1 or more Croatian citizens (Figure 4).

**Figure 4: Share (%) of immigrated Croatian citizens from Croatia to Austria according to NUTS 3 regions 2013–2020**



Source: STATISTIK AUSTRIA 2022b; GISCO 2020.

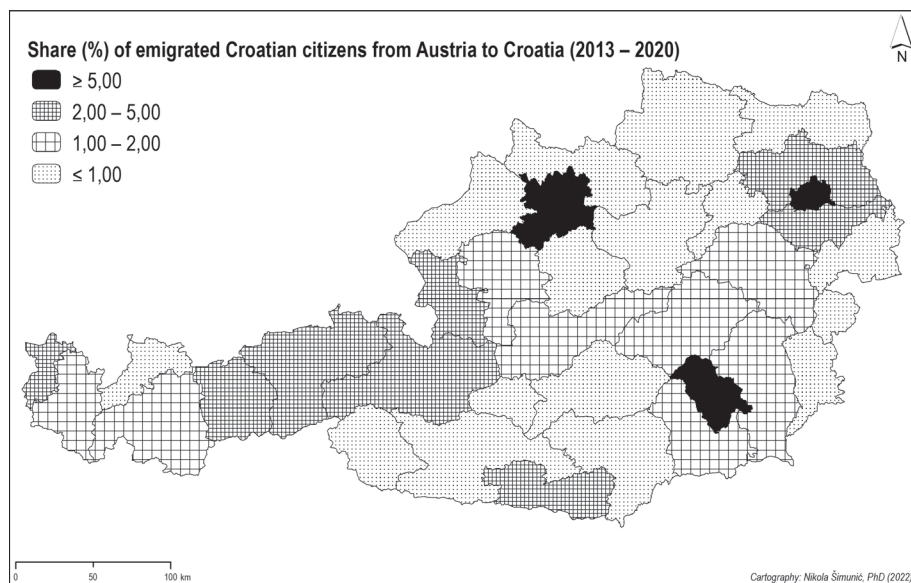
2020 saw the maximum immigration of Croatian citizens from Croatia to Austria (Appendix 3). Compared to the previous year (2019), there was an increase in the immigration of Croatian citizens from Croatia to Austria in as many as 26 (out of 35) Austrian NUTS 3 regions. The largest increase in relative terms was recorded in the NUTS 3 regions of Sankt Pölten (the change index 2020/2019 was 380.00) and Weinviertel (the change index 2020/2019 was 333.33), while in absolute terms the largest increase was recorded in the NUTS 3 regions of Vienna (+448) and Linz-Wels (+220).

The above-mentioned data from Austrian statistics show that total immigration to Austrian regions has been intensifying. Vienna is still as important to Croatian citizens (as a destination for migration) as it was at the beginning of the observed period.

According to Austrian statistics (2022), out of the previously mentioned 16,096 Croatian citizens that emigrated from Austria to Croatia between 2013 and 2020, most of them emigrated from the NUTS 3 regions of Vienna (34.75 %), Graz (13.77 %) and Linz-Wels (7.42 %). In the same period, 9,005 Croatian

citizens emigrated from Croatia to the mentioned NUTS 3 regions. The lowest number of emigrated Croatian citizens from Austria to Croatia (2013–2020) was recorded in the NUTS 3 regions of Osttirol (0.12 %), Weinviertel (0.19 %) and Mittelburgenland (0.26 %). In the same period, only 92 Croatian citizens from Croatia emigrated from the mentioned NUTS 3 regions (Figure 5).

**Figure 5: Share (%) of emigrated Croatian citizens from Austria to Croatia by NUTS 3 regions 2013–2020**



Source: STATISTIK AUSTRIA 2022b; GISCO 2020.

2015 saw the maximum emigration of Croatian citizens from Austria to Croatia. Compared to the previous year, there was an increase in the emigration of Croatian citizens from Austria to Croatia in 25 (out of 35) Austrian NUTS 3 regions. The largest increase (in relative terms) was recorded in the NUTS 3 regions of Sankt Pölten (the change index 2015/2014 was 242.86) and Rheintal-Bodenseegebiet (the change index 2015/2014 was 213.79); in absolute terms, the largest increase was recorded in the NUTS 3 regions of Vienna (+184) and Linz-Wels (+60).

By comparison, in 2019, there was an increase in the emigration of Croatian citizens from Croatia to Austria in 19 (out of 35) Austrian NUTS 3 regions compared to the previous year. The largest increase in relative terms was recorded in the NUTS 3 regions of Mühlviertel (the change index 2019/2018 was 1000.00) and Außerfern (the change index 2019/2018 was 240.00), and in absolute terms in the NUTS 3 regions of Tiroler Unterland (+39) and Pinzgau-Pongau (+29).



Data from the Austrian statistics suggest that the total emigration from the Austrian regions decreased and is not as intensive as in 2015. It is possible to assume that the majority of Croatian immigrants from Croatia made their living in Austria, that is, they managed to get a job. Return migrations were certainly significant enough, mainly due to the student population returning to Croatia after completing their studies (or a semester). Among the returnees, there are also families who did not manage to settle down in Austria.

## 6. Conclusions

The paper examines selected demographic characteristics of the migration contingent consisting of Croatian citizens of Croatian origin who moved from Croatia to Austria and from Austria to Croatia (return migration) in the period between 2013 and 2020. Austrian statistics are accurate and provide an insight into certain demographic characteristics based on which it is possible to draw some synthetic conclusions.

A total of 16,096 Croatian citizens emigrated to Croatia from Austria (2013–2020), and a total of 39,025 Croatian citizens immigrated to Austria from Croatia, which means that Croatia recorded a negative overall migration balance compared with Austria (–22,929 Croatian citizens) in the observed period.

This is because the Austrian labour market is relatively close to Croatia and migration has been made easier after Croatia's accession to the European Union. There is also a certain developmental disparity between Croatia and Austria which, combined with historical factors (the former affiliation of parts of Croatia to Austrian territory and a significant community of Burgenland Croats), is a very pronounced pull factor for emigration from Croatia to Austria. Although emigration from Croatia to Austria has stabilized in recent years, an increase in emigration in the post-pandemic period is possible.

It is important to point out that all Austrian NUTS 3 regions recorded a positive migration balance with Croatia, with the most attractive regions for immigration for Croatian citizens being the NUTS 3 regions of Vienna, Graz and Linz-Wels. These are, of course, the largest Austrian metropolises which, due to greater employment opportunities, are very attractive destinations for Croatian citizens.

In the context of the age structure of Croatian citizens who immigrated from Croatia to Austria, there were 6,220 young people (18.78 %), 26,349 mature people (79.54 %) and 558 old people (1.68 %). Among the mature Croatian immigrants, younger age groups (especially 20–24 years old) prevailed, which shows that a significant part of the emigration wave from Croatia to Austria consists of Croatian students and job seekers. Among Croatian citizens who immigrated to Austria (2013–2019), men prevailed (56.94 %) over women (43.06 %).



It can be concluded that Austria is a very attractive migration destination for Croatian citizens. Younger people mostly move to Austria due to greater employment opportunities, while students most often return to Croatia after completing their studies.

According to research by Ščukanec (2017), most of the younger emigrants plan to return to Croatia either in retirement or when the conditions for employment in Croatia improve, which will certainly contribute to the demographic renewal of Croatia as well as to the increase of knowledge and capital investments, which will especially affect the development of rural areas.

Considering the broader migration issues, we believe that Croatia should take a strategic approach to planning its migration policy since migration is a strong destabilizing factor in Croatia's demographic trends.

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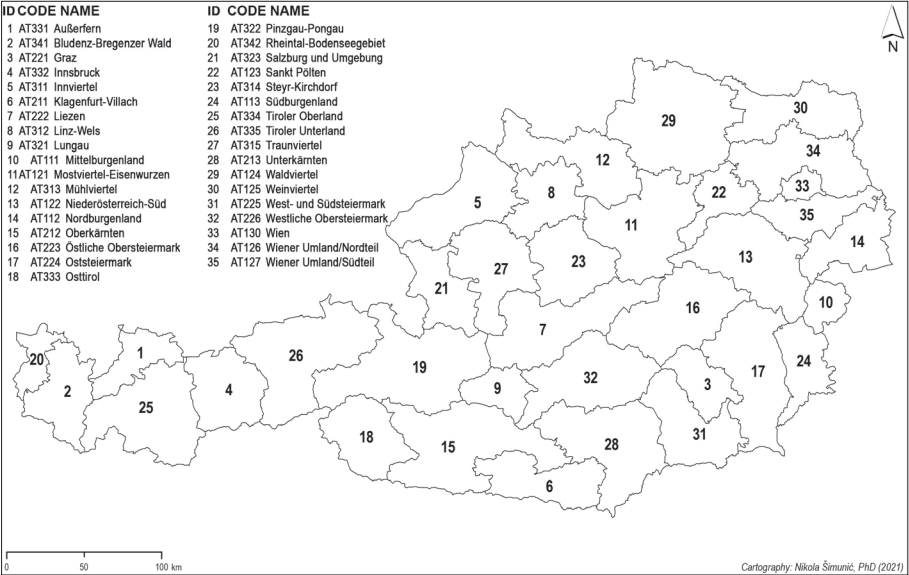
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## Notes

- <sup>1</sup> More about desk analysis in Milas 2009.
- <sup>2</sup> The County of Vukovar-Sirmium recorded the largest decrease in the population (population change index –80.46) and the City of Zagreb the least (change index –97.46). Negative demographic trends are most clearly seen from the data confirming that a decrease in the population (2011–2021) was recorded in 91.37 % of Croatian cities and municipalities (Croatian Bureau of Statistics 2012; 2022).
- <sup>3</sup> Numerous authors have warned about the discrepancy in the statistics on emigration between Croatia (Croatian Bureau of Statistics) and foreign countries (Pokos 2017; Rajković & Iveta 2017; Jurić 2018; Jerić 2019). That is one of the reasons why the authors of this paper use only data from the Austrian statistics.
- <sup>4</sup> This data should be viewed through the prism of the total population of the mentioned countries (2013): Germany – 80,523,746 inhabitants (almost 19 times more than Croatia); Croatia – 4,262,140 inhabitants; Romania – 20,020,074 inhabitants (almost 5 times more than Croatia) (Eurostat 2021).
- <sup>5</sup> Continuing the comment in the previous footnote, the population of the mentioned countries (2020) was: Germany – 83,166,711 inhabitants; Croatia – 4,058,165 inhabitants; Romania – 19,317,948 inhabitants (Eurostat 2021).
- <sup>6</sup> Bundesrecht konsolidiert 2022.
- <sup>7</sup> By comparison, in the previous eight-year referential period (2005–2012), 15 Austrian NUTS 3 regions recorded a negative migration balance of Croatian citizens with Croatia (STATISTIK AUSTRIA 2022a).

Appendices

150 Appendix A: 1 NUTS 3 regions of Austria (2021)



Source: GISCO 2020.

Appendix B: Croatian citizens in Austria by NUTS 3 regions (2013–2020)

NUTS 3 regions	2013	2014	2015	2016	2017	2018	2019	2020
Außerfern	278	277	285	280	280	288	301	313
Bludenz-Bregenzer Wald	341	374	438	530	618	685	720	751
Graz	5422	5891	6521	7095	7583	8168	8737	9406
Innsbruck	1687	1777	1886	1939	2001	2032	2093	2140
Innviertel	871	913	1002	1058	1144	1183	1241	1344
Klagenfurt-Villach	3190	3356	3530	3657	3797	3901	4093	4301
Liezen	904	968	1093	1173	1259	1339	1413	1492
Linz-Wels	5377	5708	6249	6699	7135	7620	8098	8616
Lungau	94	109	111	131	143	168	187	197
Mittelburgenland	107	108	124	143	148	155	152	157
Mostviertel-Eisenwurzen	274	300	309	334	334	356	378	401
Mühlviertel	107	114	120	147	149	162	179	191
Niederösterreich-Süd	814	851	919	982	1037	1070	1121	1148
Nordburgenland	526	554	595	633	660	684	714	728
Oberkärnten	758	761	794	822	830	855	881	915

NUTS 3 regions	2013	2014	2015	2016	2017	2018	2019	2020
Östliche Obersteiermark	1604	1677	1798	1896	2025	2117	2271	2462
Oststeiermark	380	406	459	486	533	571	617	661
Osttirol	130	139	147	155	154	150	157	163
Pinzgau-Pongau	1725	1807	1898	2037	2113	2206	2356	2445
Rheintal-Bodenseegebiet	1519	1573	1715	1809	1922	2000	2068	2134
Salzburg und Umgebung	3398	3438	3585	3677	3767	3898	3976	4057
Sankt Pölten	330	337	379	382	399	417	429	426
Steyr-Kirchdorf	1142	1207	1317	1424	1509	1604	1669	1744
Südburgenland	221	235	256	256	258	260	268	276
Tiroler Oberland	317	311	321	334	350	393	431	458
Tiroler Unterland	2047	2167	2250	2348	2453	2621	2782	2900
Traunviertel	1881	1943	2068	2229	2331	2444	2612	2717
Unterkärnten	682	701	715	761	784	810	806	844
Waldviertel	137	131	135	165	160	152	158	145
Weinviertel	142	149	148	164	182	203	210	229
West- und Südsteiermark	619	654	682	741	797	876	1019	1173
Westliche Obersteiermark	807	840	909	954	985	999	1021	1050
Vienna	17.596	18.789	20.038	20.933	21.498	22.089	22.530	23.128
Wiener Umland-Nordteil	1738	1825	1971	2078	2135	2278	2307	2372
Wiener Umland-Südteil	1454	1569	1708	1796	1861	1928	2004	2112
<b>TOTAL</b>	<b>58.619</b>	<b>61.959</b>	<b>66.475</b>	<b>70.248</b>	<b>73.334</b>	<b>76.682</b>	<b>79.999</b>	<b>83.596</b>

Source: STATISTIK AUSTRIA 2022a.

### Appendix C: Croatian citizens who immigrated from Croatia to Austria by NUTS 3 regions (2013–2020)

NUTS 3 regions	2013	2014	2015	2016	2017	2018	2019	2020.
Außerfern	14	24	11	12	18	16	29	23
Bludenz-Bregenzer Wald	60	77	116	119	124	100	105	83
Graz	474	693	704	647	689	773	823	955
Innsbruck	112	147	125	109	99	107	103	135
Innviertel	50	87	79	73	62	62	72	81
Klagenfurt-Villach	194	204	181	182	183	190	199	228
Liezen	73	132	120	123	112	98	118	90
Linz-Wels	327	553	510	415	462	445	415	635
Lungau	22	16	20	15	37	26	25	21
Mittelburgenland	3	14	21	8	12	7	6	8
Mostviertel-Eisenwurzen	17	38	30	7	18	15	14	17

NUTS 3 regions	2013	2014	2015	2016	2017	2018	2019	2020.
Mühlviertel	10	16	23	4	8	7	15	12
Niederösterreich-Süd	57	61	76	46	48	35	35	64
Nordburgenland	31	47	53	29	24	38	31	33
Oberkärnten	21	42	33	28	33	45	42	60
Östliche Obersteiermark	75	125	123	124	107	154	204	197
Oststeiermark	22	64	54	56	51	66	66	54
Osttirol	9	9	7	4	5	12	6	10
Pinzgau-Pongau	104	121	168	142	145	184	163	186
Rheintal-Bodenseegebiet	83	168	167	131	98	122	122	165
Salzburg und Umgebung	126	188	159	144	159	156	130	235
Sankt Pölten	9	30	19	19	10	8	10	38
Steyr-Kirchdorf	54	118	121	85	74	83	67	94
Südburgenland	22	29	25	18	12	16	8	15
Tiroler Oberland	32	42	40	46	60	58	64	41
Tiroler Unterland	162	134	173	169	200	230	199	166
Traunviertel	81	165	157	132	136	139	134	167
Unterkärnten	30	28	52	50	31	35	42	48
Waldviertel	0	7	20	9	10	6	10	19
Weinviertel	1	3	8	11	4	5	3	10
West- und Südsteiermark	48	58	81	79	85	112	111	119
Westliche Obersteiermark	29	74	52	45	31	38	37	58
Vienna	1328	1753	1615	1320	1145	1157	1093	1541
Wiener Umland-Nordteil	80	133	114	70	95	52	64	138
Wiener Umland-Südteil	97	131	92	82	94	87	107	152
TOTAL	3857	5531	5349	4553	4481	4684	4672	5898

Source: STATISTIK AUSTRIA 2022b.

Appendix D: Number of Croatian citizens who emigrated from Austria to Croatia by NUTS 3 regions (2013–2020)

NUTS 3 regions	2013	2014	2015	2016	2017	2018	2019	2020
Außerfern	7	21	10	8	7	5	12	8
Bludenz-Bregenzer Wald	16	17	30	37	53	48	73	46
Graz	146	224	270	297	287	346	327	320
Innsbruck	30	54	82	67	59	58	62	59
Innviertel	7	13	23	14	23	17	21	23
Klagenfurt-Villach	58	96	90	83	111	71	88	82
Liezen	24	22	24	38	26	27	36	35



NUTS 3 regions	2013	2014	2015	2016	2017	2018	2019	2020
Linz-Wels	66	132	192	147	167	176	158	157
Lungau	10	4	7	4	3	15	12	18
Mittelburgenland	2	4	4	3	4	13	3	14
Mostviertel-Eisenwurzen	2	13	6	10	3	8	8	3
Mühlviertel	2	6	5	7	4	1	10	7
Niederösterreich-Süd	22	25	41	33	39	16	32	16
Nordburgenland	14	11	20	13	26	23	19	11
Oberkärnten	9	10	13	16	11	15	17	17
Östliche Obersteiermark	22	27	42	45	28	43	44	57
Oststeiermark	6	16	23	18	17	29	34	28
Osttirol	2	2	0	4	3	3	1	5
Pinzgau-Pongau	30	26	36	50	32	40	69	72
Rheintal-Bodenseegebiet	28	29	62	52	56	65	52	33
Salzburg und Umgebung	65	79	100	80	69	71	75	79
Sankt Pölten	5	7	17	4	9	7	9	7
Steyr-Kirchdorf	9	17	17	13	18	20	25	22
Südburgenland	8	12	22	14	12	6	6	7
Tiroler Oberland	32	27	27	24	19	30	38	36
Tiroler Unterland	42	57	61	64	62	70	109	94
Traunviertel	21	34	37	37	35	33	32	36
Unterkärnten	15	9	8	15	7	20	10	10
Waldviertel	0	4	6	4	13	5	5	7
Weinviertel	1	0	4	2	8	6	3	6
West- und Südsteiermark	16	25	30	30	22	29	22	49
Westliche Obersteiermark	18	11	22	18	14	10	11	11
Vienna	428	664	848	826	729	769	705	624
Wiener Umland-Nordteil	32	35	57	58	44	54	44	34
Wiener Umland-Südteil	30	44	55	60	55	58	69	52
<b>TOTAL</b>	<b>1225</b>	<b>1777</b>	<b>2291</b>	<b>2195</b>	<b>2075</b>	<b>2207</b>	<b>2241</b>	<b>2085</b>

Source: STATISTIK AUSTRIA 2022b.



# Guidelines for Contributors

**General** — The editorial board of *Treatises and Documents, The Journal of Ethnic Studies* welcomes the submission of scholarly articles in the field of ethnic and minority studies, especially on racial and ethnic relations, ethnic identity, nationalism, xenophobia, the protection of (ethnic, national, linguistic, religious, and other) minorities, migration, multiculturalism and related subjects. The journal is particularly interested in discussions regarding ethnic and minority issues in the so-called Alpine-Adriatic-Pannonian area and all comparative studies, which include – only partially or as a whole – this geographic area. This area comprises the Alpine arc, the hinterland of the eastern Adriatic and Pannonian Basin. More technically, this area includes the following countries: Albania, Austria, Bosnia and Herzegovina, Croatia, Czech Republic, Italy, Germany (especially the southern part), Hungary, Kosovo, Montenegro, Romania, Serbia, Slovakia and Slovenia. Also Macedonia and Bulgaria may be interesting cases.

Two issues of the journal are published every year, usually in June and December.

Articles that are submitted must be original, unpublished material and should not be simultaneously under consideration – either in whole or in part – for publication elsewhere.

The journal encourages the submission of articles in English, since this enables authors to present their ideas and work to a broader public. However, articles in other languages – with a special emphasis on the Slovenian language – are also welcome. The abstracts of the articles are always published in the language of the article and in English.

Authors who do not have native or equivalent proficiency in English must prior to submission have the article read by someone with this proficiency. This step ensures that the academic content of your paper is fully understood by journal editors and reviewers. Articles which do not meet these requirements will most likely not be considered for publication.

Manuscripts should be submitted in electronic form and must include:

- the submitted article, with the title in the language of the article and in English;
- an abstract of the article in the language of the article and in English; this should include a brief presentation of the issues discussed, the methodology used, the main findings and the conclusions;
- 3 – 7 key words in the language of the article and in English.

The length of the title, the abstract and the key words in one language should not exceed 1,100 characters (including spaces). More detailed information about the form of submitted manuscripts is presented in the prescribed template, available at the journal's website (<https://rig-td.si>).

In a separate document please submit: the author(s) name, the title of the article, any acknowledgment of research funding and a brief biographical note on each author with full contact information (for publication in the journal). Please refer to the template (at the journal's website) for further detailed information.

All submitted manuscripts are subjected to peer-review procedure by at least two reviewers. The review procedure is double blind. Authors may be asked to revise their articles bearing in mind suggestions made by the editors or reviewers. The final decision on publication rests with the editorial board.

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**Format and Style** — The preferred **length for articles** is between 30,000 and 45,000 characters, including spaces (between approx. 4,500 and 6,500 words). Longer articles may be accepted at the discretion of the editorial board. A limited number of endnotes are permitted, if they are used for explanatory purposes only. They should be indicated serially within the article.

Authors should take into careful consideration also the **style and format requirements** of the journal, which are presented in the template (available at <https://rig-td.si>) in more detail. Particular attention should be paid to the formatting of references, single spacing throughout and the inclusion of keywords and abstracts. Articles that do not meet these requirements will be returned for modification before being read and reviewed.

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