

ANNALES

Anali za istrske in mediteranske študije
Annali di Studi istriani e mediterraneei
Annals for Istrian and Mediterranean Studies
Series Historia et Sociologia, 31, 2021, 3





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VSEBINA / INDICE GENERALE / CONTENTS

- Pavel Jamnik, Bruno Blažina, Borut Toškan, Slavko Polak & Draško Josipovič:** Uršnja luknja v Podtaborski steni pri Šembijah. Ostanki moustérienskega planega tabora, naplavljeni v jamo z drobirskim tokom 367
La grotta Uršnja luknja nella parete di Podtabor presso Šembije. Resti di un accampamento del musteriano trasportati nella grotta da un flusso di detriti
The Uršnja luknja Cave in the Podtabor Wall at Šembije. Remains of a Mousterian Open-Air Site Washed into the Cave by Debris Flow
- Ana Konestra, Paula Andoić Gračanin & Fabian Welc:** Burialscapes of Rab Island (North East Adriatic): The Role of Sepulchral Evidence in the Reconstruction of Roman and Late Antique Rural Settlement Pattern 391
Paesaggi sepolcrali dell'isola di Arbe (Adriatico Nordorientale): il ruolo dell'evidenza sepolcrale nella ricostruzione del modello insediativo romano e tardo antico
Grobiščna krajina otoka Raba (severovzhodni Jadrana): vloga grobišč pri rekonstrukciji rimskega in poznoantičnega podeželskega modela poselitve
- Ladislav Placer:** Kulturno in zgodovinsko sporočilo Milanje – 2. del: Sv. Jurij v Ilirski Bistrici in Sv. Marija v Knežaku 413
Messaggio culturale e storico di Milanja – parte 2: San Giorgio a Ilirska Bistrica e Santa Maria a Knežak
Cultural and Historical Significance of the Milanja– Part Two: St George in the Town of Ilirska Bistrica and St Mary in the Village of Knežak
- Chrysi Rapanta, Leandro Madrazo, Maria Irene Aparicio, Nuno Fonseca, Rosalice Pinto & Špela Verovšek:** Assessing the Quality and Social Impact of Creative Placemaking Practices 427
Valutare la qualità e l'impatto sociale delle pratiche di "placemaking" creativo
Vrednotenje kreativnih praks ustvarjanja prostora skozi s preminjanje vrednot in vpliv na družbeno-fizične podobe prostora
- Aurora Saidi, Matija Svetina & Tadeja Zupančič:** Memorable Impressions as Significant Descriptors of the Qualities of a House: Exploring the Experiential Qualities of the Traditional House in Tetovo 441
Impronte di memoria quali descrittori significativi delle qualità di una casa: esplorare le qualità esperienziali della casa tradizionale a Tetovo
Bivalne izkušnje kot pomembni opisovalci lastnosti hiše: raziskovanje izkustvenih lastnosti tradicionalne hiše v Tetovu
- Nada Bulić & Ante Matan:** *Josephi Schneider "Carminum libri octo". La Mors, componente essenziale dell'espressione poetica di Joseph Schneider* 465
Joseph Schneider "Carminum Libri Octo". The Mors, Essential Component of Joseph Schneider's Poetic Expression
Joseph Schneider "Carminum libri octo". Mors, bistvena prvina pesniškega izraza Josepha Schneiderja

<p>Ana Toroš: Marisa Madieri, Jan Morris and Irena Žerjal: English, Istrian Triestine and Slovene Literalisation of Trieste and the Surrounding Area at the End of World War II 475 <i>Marisa Madieri, Jan Morris e Irena Žerjal: Letteratura inglese, triestina istriana e slovena sulla Trieste e dintorni alla fine della seconda guerra mondiale</i> <i>Marisa Madieri, Jan Morris in Irena Žerjal ter angleška, istrskotržaška in slovenska literarizacija Trsta in tržaškega prostora ob koncu druge svetovne vojne</i></p>	<p>Rok Smrdelj: Research on Migration on Slovenian Media: The “Other” in the Period of “Crisis” 519 <i>Il tema delle migrazioni nei media sloveni: “gli altri” nel periodo di “crisi”</i> <i>Raziskovanje migracij v slovenskih medijih: “drugi” v obdobju “krize”</i></p>
<p>Tatjana Vujović: Perception and Coping With Mobbing towards Women in Montenegro 487 <i>La percezione del mobbing sulle donne sul posto di lavoro in Montenegro</i> <i>Percepcija in soočanje z mobbingom nad ženskami v Črni gori</i></p>	<p>Vladimir Prebilič & Simona Kukovič: Cooperation Between Local Communities and the Civil Protection in Overcoming the Covid-19 Crisis: <i>Ad omnia parati sumus</i> 535 <i>Cooperazione tra le comunità locali e la protezione civile per superare la crisi relativa al covid-19: Ad omnia parati sumus</i> <i>Sodelovanje lokalnih skupnosti in civilne zaščite v premagovanju covid-19 krize: Ad omnia parati sumus</i></p>
<p>Aleksej Kalc: O vzpostavitvi izseljenske zakonodaje v Kraljevini Srbov, Hrvatov in Slovencev 507 <i>Sull'introduzione della legge sull'emigrazione nel Regno dei Serbi, Croati e Sloveni</i> <i>Regarding the Introduction of the Emigration Law in the Kingdom of Serbs, Croats and Slovenes</i></p>	<p>Kazalo k slikam na ovitku 545 <i>Indice delle foto di copertina</i> 545 <i>Index to images on the cover</i> 545</p>

URŠNJA LUKNJA V PODTABORSKI STENI PRI ŠEMBIJAH OSTANKI MOUSTÉRIENSKEGA PLANEGA TABORA, NAPLAVLJENI V JAMO Z DROBIRSKIM TOKOM

Pavel JAMNIK

Kočna 5, 4273 Blejska Dobrava, Slovenija
e-mail: pavel.jamnik@telemach.net

Bruno BLAŽINA

Jenkova cesta 16, 6230 Postojna, Slovenija
e-mail: bruno.blazina@gmail.com

Borut TOŠKAN

ZRC SAZU, Inštitut za arheologijo, Novi trg 2, 1000 Ljubljana, Slovenija
e-mail: borut.toskan@zrc-sazu.si

Slavko POLAK

Notranjski muzej Postojna, Kolodvorska cesta 3, 6230 Postojna, Slovenija
e-mail: slavko.polak@notranjski-muzej.si

Draško JOSIPOVIČ

Oldhamska 1, 4000 Kranj, Slovenija

IZVLEČEK

Do sedaj je bilo znano le, da so bili v Uršnji luknji pri Šembijah nad Ilirsko Bistrico leta 1880 izkopani ostanki pleistocenske favne. Članek vsebuje pregled dosedanjih raziskav, rezultate zooarheološke analize fosilnih ostankov, zbranih v zadnjih štiridesetih letih, in opis elementov kamene industrije, pridobljene iz breče, ki zapolnjuje jamske rove. Dokazujemo, da je bil material, ki se je kasneje sprijel v brečo, v jamo naplavljen z »drobirskim tokom«, ki se je sprožil na pobočju nad jamo, na poti do jame pa na površju nad jamo zajel tudi ostanke kamenodobnega tabora. Glede na tipološke lastnosti kameno industrijo pripisujemo moustérienski kulturi srednjega paleolitika. S pomočjo datacije U-Th starosti treh živalskih zob dogajanje umeščamo v čas od 92.000 do 56.000 pr. n. št., kar okvirno ustreza kisikovim izotopskim stopnjam OIS 5b–4.

Ključne besede: Uršnja luknja, Podtaborska stena, breča, pleistocenska favna, plano najdišče, moustérien, analiza U-Th

LA GROTTA URŠNJA LUKNJA NELLA PARETE DI PODTABOR PRESSO ŠEMBIJE RESTI DI UN ACCAMPAMENTO DEL MUSTERIANO TRASPORTATI NELLA GROTTA DA UN FLUSSO DI DETRITI

SINTESI

Le uniche notizie note sulla Grotta Uršnja luknja presso Šembije sopra Ilirska Bistrica risalgono al 1880 quando in essa furono rinvenuti resti di fauna pleistocenica. Nel presente articolo gli autori passano in rassegna le ricerche precedenti e i risultati dell'analisi zooarheologica dei resti fossili, rinvenuti negli ultimi quarant'anni, e descrivono i manufatti litici provenienti dalla breccia di riempimento delle gallerie. Gli autori dimostrano che il materiale, concrezionato nella breccia, è stato trasportato nella grotta assieme ai detriti, scivolati dal pendio soprastante la cavità, che hanno trascinato con sé anche i resti di un accampamento preistorico, posto nell'area sopra la grotta. Le caratteristiche tipologiche datano l'industria litica nell'ambito della cultura musteriana del paleolitico medio. Tre denti animali, datati con il metodo U/Th, collocano gli avvenimenti in un arco temporale tra i 92000 e i 56000 anni BP, il che corrisponde circa agli stadi 5b-4 della stratigrafia isotopica dell'ossigeno (OIS).

Parole chiave: Uršnja luknja, parete rocciosa di Podtabor, breccia, fauna pleistocenica, sito piano, periodo musteriano, metodo di datazione U/th

UVOD

Uršnja luknja je manjša kraška jama, ki se odpira na višini 580 m tik pod vrhom Podtaborske stene, nad katero se pobočje položno dviguje do najvišje točke grebena, imenovanega Vrh (778 m). Podtaborska stena, ki je del Taborskega grebena, je strm skalni rob, ki se razteza med Pivko in Šembijami (slika 1). Prek skalnega grebena teče več naravnih komunikacijskih prehodov. Eden se odpira proti Ilirski Bistrici na višini 590 m pri Šembijah, blizu izrazite previsne, do 70 metrov visoke Podtaborske stene. Rob stene je meja med kraškim Pivškim podoljem na severozahodu in flišno dolino Reke na jugozahodu (Logar, 2005; 2010, 125). Gre za t. i. kontaktni kras, kjer se spodnjekredni in paleogenški apnenici narivajo na mlajše eocenske flišne plasti (Šikić et al., 1972; Pavlovec & Pleničar, 1980, 41). Na stiku propustnega apnenca in nepropustnega fliša na dan prihajajo številni izviri, ki se združujejo v potok Podstenjšek. Ob vznožju in v sami Podtaborski steni je poleg Uršnje luknje znanih še nekaj kraških jam (Urški spodmol, Jakcova luknja, Luknja v gradu, Kozja luknja, Zatrep), ki so imele ob nastanku v fraetični coni funkcijo ponorov. Flišne plasti so bile namreč mnogo višje, kot so danes, zato so vode tekle iz smeri flišnih plasti in ponikale v kraški masiv. Ko se je nivo flišnih plasti znižal, so prejšnje ponorne jame obvisle v različnih višinah Podtaborske stene (Logar, 2010, 134). Kasneje je v jamah, v tako imenovani vadozni coni, prihajalo še do preoblikovanja jamskih prostorov zaradi ostalih procesov speleogeneze.

V katastru JZS je Uršnja luknja vpisana pod številko 1174, v evidenci Arheološkega katastra Slovenije pa pod ID-številko 050904.01 kot jama s pleistocenskimi živalskimi kostnimi ostanke (http://arkas.zrc-sazu.si/index.php?kaj=viewNajdisce.poglej&id=050904.01).

Jama ima dve med seboj povezani etaži s samostojnima vhodoma (sliki 2, 3). Višji, manjši vhod, visok 1,6 m in širok 1 m, pelje v le 7 metrov dolg rov. Spodnji vhod je visok 6,6 m in širok 3 m, za njim pa se odpira vodoravni rov, ki se na nekaj mestih malenkostno razširi in se po 23 metrih konča z brečasto zapolnitvijo nadaljevanja. V stropu rova je vidnih več vodno oblikovanih rovov, ki imajo nadaljevanja prav tako zapolnjena z brečo. Jamski prostor obeh etaž je bil v nekem obdobju po prekinitvi ponorne funkcije jame povsem zapolnjen z gruščnatimi sedimenti, ki so se kasneje zlepi v brečo. Ta je bila, verjetno že v času

pleistocena ali takoj po nastopu holocena, ponovno denudirana iz obeh etaž. S tem sta jamska rova postala vnovič dostopna v obsegu jame, kakršnega poznamo danes. V jami je malo kapniškega okrasja, na nekaj mestih stene prekriva tanka plast sige. Jamska tla, stene in ostanke sige v zadnjem delu spodnje etaže in skoraj v celotnem zgornjem rovu prekriva ilovnat oprh, ki se odlaga iz meteorne vode, ki doteka v jamo z le nekaj metrov višjega površja.

ZGODOVINA RAZISKAV IN PODATKI O UPORABI JAME

Že v 19. stoletju sta lepo obokani vhod v spodnjo etažo in dovolj prostora pred jamo takratnim raziskovalcem vzbudila misel, da so morda jama obiskovali že ljudje v prazgodovini. Prvič so to možnost junija 1880 preverjali Dragutin Dežman¹, Ferdinand Ritter von Hochstetter² in Josef Szombathy³. V letnem poročilu oziroma pismu Deželnemu odboru za leto 1880 Dežman zgolj omeni, da je v *Uršni lukni* izkopaval Szombathy, ne napiše pa ničesar o rezultatih izkopavanja (Deschmann, 1880). Tudi Hochstetter in Szombathy rezultatov izkopavanja nikoli nista objavila. Pred leti je Brigitta Mader iz Deželnega arhiva na Dunaju iz zasebnega arhiva pridobila kopijo Szombathyjevega rokopisnega poročila o izkopavanju v Uršnji luknji. Žal se je kopija izgubila, zato je o zapisanem znano le to, kar sta ob študiji o snežni sovi iz kopije poročila takrat povzela avtorja študije Župančič in Mihelič: »... rokopisna stran izpod dveh rok (F. v. Hochstetter in J. Szombathy). Stran se začne z rokopisom Hochstetterja: *Uršna jama oder Uršna luknja zu deutsch Urschelloch bei Podtabor unweit Schambije in Krain. Sledi seznam sesalcev izpod Szombathyjeve roke, ki se konča z Nyctea nivea (Schnee eule) in se nadaljuje s pisavo Hochstetterja: Ausgegraben während Juni 1880 von Carl Deschman*« (Župančič & Mihelič, 2008, 262). Skromni ohranjeni podatek o vsebini zapisa nam sporoča, da so med izkopavanjem našli pleistocenske kostne ostanke živali. Žal ne vemo, katere živalske vrste, in tudi ne, ali v poročilu morda omenjajo kakršnekoli ostanke, povezane s prisotnostjo kamenodobnih ljudi⁴.

Načrt Uršnje luknje (Kat. št. 1174) v prerezu in tlorisu je v prvem jamarskem zapisniku, ki ga vodita Jamarska zveza Slovenije in Inštitut za raziskovanje

1 Dragutin Dežman (tudi Karel Dežman ali Karl Deschmann, 1821–1889), znanstvenik in politik. Od leta 1852 kustos Deželnega muzeja v Ljubljani (Pirjevec, 2013).

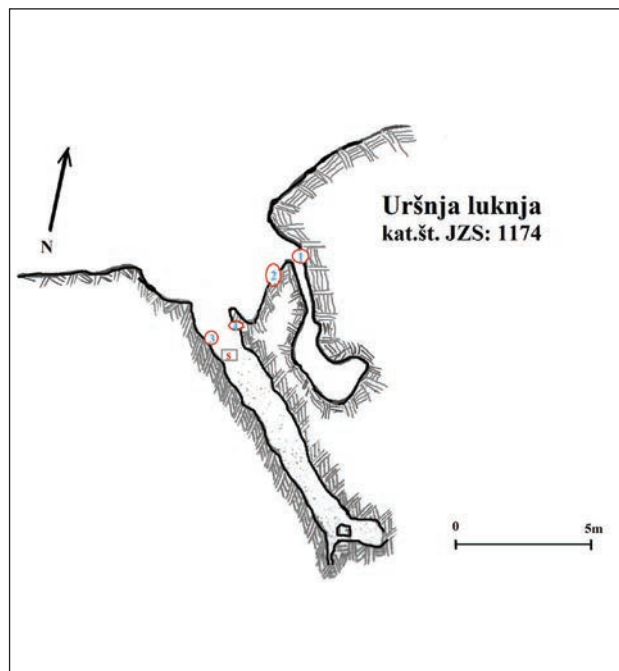
2 Ferdinand Ritter von Hochstetter (1829–1884), direktor kraljeve geološke fundacije, profesor mineralogije in geologije na Politehničnem inštitutu na Dunaju. Preučeval je tudi prazgodovino Kranjske.

3 Josef Szombathy (11. 6. 1853–9. 11. 1943). Avstro-ogrski arheolog, antropolog. Na Slovenskem je od leta 1883 do 1906 izkopaval na številnih prazgodovinskih najdiščih (Gabrovec, 2013).

4 Leta 2017 smo za pomoč za ponovno pridobitev kopije arhivskega dokumenta pri lastniku arhiva g. Strassgschwandtnerju zaprosili dr. Brigittę Mader z Avstrijske akademije znanosti Inštituta za orientalsko in evropsko arheologijo (OREA), na Oddelku za evropsko arheologijo. Žal tokrat kopije ni bilo več mogoče pridobiti. Za pomoč in trud se Maderjevi iskreno zahvaljujemo.



Slika 1: Podtaborska stena z označeno lokacijo Uršnje luknje (Foto: P. Jamnik).



Slika 2: Tloris Uršnje luknje z označenimi mesti najdb kamenodobne industrije in sondo iz leta 1880 (dopolnjeni načrt po Gantarju, 1956).

krasa ZRC SAZU, leta 1956 oblikoval Janez Gantar. Dopolnilni zapisnik je na podlagi skupnega ogleda z Martinom Knezom (IZRK) leta 2005 izdelala Jana Logar. V opombah Gantarjevega zapisnika je omemba, da je – po pripovedovanju domačinov – v jami nekdanj prebivalca slabomurna Grgurjeva Urša, po kateri je objekt dobil svoje ime. Po pripovedovanju Vincencije Nadoh⁵ (roj. 1. 4. 1932) iz Podtabora naj bi Urša v jami bivala sredi 19. stoletja. Naslednji podatek o uporabi jame je bil zabeležen konec 2. svetovne vojne. Po navodilih partizanov so se 9. maja 1945 pred nemško vojsko, ki se je umikala z Reke in iz Ilirske Bistrice, v jamo zatekli domačini. Kakih 50 ljudi se je takrat krajši čas skrivalo v jami. Med njimi tudi pripovedovalka Vincencija Nadoh in celo nekateri domačini iz Ilirske Bistrice.

Leta 1982, po več kot sto letih od prvega izkopavanja, je jamo, ki mu jo je pokazal Robert Šuštar iz Šembij, obiskal Slavko Polak. V tistem času so otroci iz Šembij in Podtabra na vhodu občasno taborili ter kurili ogenj. Razširili in za približno pol metra so poglobili plato pred jamo ter iz kosov breče izdelali

suh oporni zid na robu strmega pobočja tik pred jamo. Polak je na jamskem dnu, na površini sedimenta približno na sredini jame, našel fosiliziran zob, meljak jamskega medveda. Ker je prepoznal, da je zob fosiliziran, ga je ob priložnosti pokazal hrvaškemu paleontologu Mirku Malezu, ta pa je o tem 17. 12. 1983 obvestil slovenskega kolega z Inštituta za arheologijo ZRC SAZU, Mitjo Brodarja. Dne 19. 5. 1984 sta si jamo, skupaj s Polakom ogledala arheologa Mitja Brodar in Ivan Turk. Našli so nekaj fosilnih kostnih fragmentov, vendar sta arheologa ocenila, da Uršnja luknja zaradi plitvega sedimenta ni zanimiva za podrobnejše paleolitske raziskave (Letopis SAZU, 1985, 182). V breči takrat žal niso opazili kamenodobnih kulturnih ostankov.

Polak je z namenom popisovanja jamske favne jamo v naslednjih letih še večkrat obiskal. Ker je Uršnja luknja fosilni rov, ki je izoliran od drugih jamskih sistemov v njej, ni troglobiontskih vrst živali. Ugotovil je prisotnost troglofilnih in trogloksenih vrst nevretenčarjev, ki se sezonsko pogojeno zatekajo v jamo, in sicer jamskih kobilic (*Troglophilus cavicola*,

⁵ Nadohova se samotarke Urše sicer ne spominja in jo pozna le po pripovedovanju svoje babice, rojene leta 1867, ki je bila v času bivanja samotarke majhna deklica. Na podlagi pripovedi lahko torej sklepamo, da je v jami živela v sredini devetnajstega stoletja. Urša ali Urška je bila nedružabna samotarka, ki se je sicer pogosto smukala po vaseh. Čeprav so jo prebivalci Podtabora in Šembij vabili medse, se je najraje skrivala v jami, ki so jo po njej poimenovali Urša ali Uršnja luknja. Z vrčem na glavi je hodila po vodo v »Curek«, ki je izvir Podstenjška, in po vaških njivah na Ravniku prebivalcem včasih izkopavala krompir. Bila je slabo oblečena, vedno razkuštrana, a se je otroci niso bali in večjih težav z njo ni bilo. Pokopana je menda na pokopališču v Šembijah. Pričevanje je tonsko zabeležila Jana Logar, posnetek pa hrani Notranjski muzej Postojna.



Slika 3: Uršnja luknja, 1, vhod v vrhno etaži, 2, mesto odloma breče z odlomki kamene industrije (Foto: P. Jamnik).

T. neglectus), jamskih pedic (*Triphosa dubitata*), zobatega vrbovčka (*Scolopteryx libatrix*) ter številnih vrst pajkov in polžev. Na koncu jame so bile najdene delno zasigane in verjetno subfosilne hišice gozdnega polža pasarja (*Aegopis croaticus*), ki se v jamo občasno zatekajo zaradi vlage in tu poginejo. V jamo se izven razmnoževalnega obdobja redno zatekajo tudi netopirji mali podkovernjaki (*Rhinolophus hipposideros*), na prezimovanju pod kamnom pa je bil najden navadni močerad (*Salamandra salamandra*). Uršnjo lukno so kasneje obiskali in priložnostno biološko raziskali tudi udeleženci Raziskovalnega tabora študentov biologije Podgrad, 96 (Polak, 1997, 50). V času speleobioloških raziskav je Polak na površini sedimenta jamskih tal nabral več fosilnih kosti in zob, nekaj kosti pa je izluščil tudi iz jamske stene, ki jo je tvorila breča. Najdene kosti je 3. 2. 1989 izročil v določanje Mirku Malezu na Zavod za geologijo in paleontologijo kvartarja pri JAZU v Zagrebu. Po Malezovi smrti leta 1990 je material neobdelan ostal v Zagrebu.

Kmalu se je razvedelo, da so v Uršnji luknji kosti jamskega medveda. Izklesanje in izginotje fragmenta lobanje medveda, ki je bil viden v breči takoj za

vhodom v jamski rov, je bil razlog, da je Polak, takrat že kustos v Notranjskem muzeju Postojna, 3. 3. 2014 in 12. 12. 2014 ter 3. 5. 2015 jamo podrobneje pregledal in iz nje za zbirko muzeja pobral fosilizirane kosti ter zobe, ki so se nahajali na jamskih tleh v površinskem prhkem sedimentu, nekaj fragmentov pa tudi v breči na stenah in stropu jame. Material je bil pobran z namenom zavarovanja fosilnih kosti pred nekontroliranim pobiranjem. Zbrani material je bil inventariziran in shranjen v paleontološki zbirki Notranjskega muzeja Postojna. Na jamskih tleh spodnjega rova Uršnje luknje je bilo najdenih tudi nekaj fragmentov lončevine, ki jo je arheologinja Alma Bavdek iz Notranjskega muzeja Postojna opredelila kot novoveško lončenino in se sedaj nahaja v zbirki navedenega muzeja.

Novembra leta 2016 sta si jamo ogledala Pavel Jamnik in Bruno Blažina. Takoj za spodnjim vhodom v jamo, v rovu in pod zunanjim robom zgornjega vhoda, je bilo vidnih več relativno svežih odlomov oziroma odbitij brečastega sedimenta. Odbiti kosi breče so bili uporabljeni kot material za popravilo opornega zidu na koncu platoja pred jamo, ki je bil narejen že

v osemdesetih letih. V svežih odlomih breče znotraj spodnjega rova in v ostanku breče pod zgornjim vhodom, vendar že zunaj jame, so bili vidni različno veliki fragmenti fosilnih kosti. V večjem odlomu breče pod vhodom v zgornji rov pa sta opazila nekaj odlomkov kremenca, ki bi bili lahko ostanek paleolitskih kamnitih orodij. Ker so bili odbiti kosi breče zloženi v opornem zidu na koncu platoja pred jamo, sta vsak kos breče natančno pregledala in v njih našla še več kosov kremenca. Ugotovila sta, da kremen oziroma kamnita orodja nedvomno pripadajo eni od paleolitskih kultur. Postalo je jasno, da Uršnja luknja ni le paleontološko, temveč tudi paleolitsko najdišče, katere kulturni inventar se nahaja na nenavadnih mestih v breči, in sicer pod stropom spodnjega rova jame in v breči več kot tri metre visoko na skalni steni pod drugim, manjšim vhodom v jamo. Ob natančnem pregledu breče, ki ni prekrita z ilovnatim oprhom, sta Jamnik in Blažina na dveh mestih v spodnjem jamskem rovu identificirala še tri primerke kamene industrije, na vhodu v zgornji rov, nekoliko nad sveže odbito brečo na zunanji strani pa že skoraj v celoti iz breče izlužen še tipološko določljivi primerek (slika 4). Skupno je bilo najdenih 20 primerkov elementov kamene industrije. Večina primerkov je odlomljenih, kar je posledica grobega odbijanja breče za pridobitev materiala za popravilo opornega zidu, kljub vsemu pa je bilo mogoče vsaj pet primerkov tudi tipološko opredeliti. O najdbah sta obvestila Notranjski muzej Postojna in mu predala tudi vse paleontološke in paleolitske najdbe, opisane v tem besedilu.

V prispevku podajamo pregled novejših najdb fosilnih ostankov pleistocenske favne in najdbe paleolitskega kulturnega inventarja Uršnje luknje. V nadaljnjem besedilu poskušamo najprej razjasniti speleogenezu zapolnjevanja in erozije v brečo sprijetega gruščnato-ilovnatega sedimenta, v nadaljevanju podamo zooarheološko analizo vseh do sedaj poznanih fosilnih kostnih ostankov in zob, tipološko opredelimo in kulturno umestimo najdene elemente kamene industrije in na koncu pridobljene podatke preverimo z rezultati analize starosti treh živalskih zob z metodo U-Th ter vsaj okvirno časovno umestimo dogajanje v Uršnji luknji.

ZAPOLNITEV URŠNJE LUKNJE Z GRUŠČNATO-ILOVNATIM SEDIMENTOM

Po ostankih breče v rovih in stenah spodnjega in zgornjega rova je vidno, da je bila jama nekoč povsem zapolnjena. Gruščnato-ilovnati sediment, ki se je kasneje zlepil v brečo, je bil odložen še vsaj nekaj metrov daleč pred jamo in vsaj do višine okoli 10 metrov nad današnjimi tlemi pred vhodom v spodnji rov. Vsaj tako je mogoče višino in obseg nekdanje breče razbrati iz sledi in zaplat, ki so še ostale prilepljene ob zunanjo skalno steno, v kateri se odpira Uršnja luknja. Tik ob

spodnjem, danes odprtem vhodu v spodnji rov je bil pred zapolnitvijo še en vhod podobne velikosti. Danes je zaprt z le do 25 cm debelim ostankom breče. Ker je v vhodnem delu rova in pred jamo breča že denudirana, je na tem nekdanjem vzporednem vhodu v breči nastalo nekaj manjših lukenj, skozi katere je mogoče pogledati v vhodni del spodnjega rova.

Več metrov debele plasti odloženih klastičnih in krioklastičnih gruščev niso v jamah nikakršna redkost. Običajno je mogoče v profilih tudi granulacijsko podobnih plasti opaziti prekinitve, ki pričajo o krajšem ali daljšem zastoju v sedimentaciji. V primeru Uršnje luknje v breči prekinitve ni videti. Gre za homogeno plast, ki je v celotni jami, kjer je brečo mogoče opazovati, enotne strukture. To kaže na relativno hitro ali celo enkratno odložitev plasti. Tudi ta pojav pri jamskih sedimentacijah ni nič posebnega.

Vse skupaj pa postane nenavadno, ko poskušamo razložiti, kako so se lahko v breči, celo pod stropom jame in v povsem zapolnjenih manjših rovih znotraj jame znašle fosilne kosti in paleolitski artefakti. Živali in ljudje do stropa zapolnjene jame pač niso mogli uporabljati. Artefakti in vsaj večina kosti v plasti torej ne morejo biti *in situ*. V primeru, da bi bila zaledje jame in prostor nad jamo primerna in bi bili v njem daljši jamski prostori, bi prišlo v poštev presedimentiranje plasti iz zaledja jamskih rogov proti izhodu iz jame. Pri Uršnji luknji je to manj verjetno, ker je nad jamo le še od dva do tri metre skalne stene, nad njo pa plato, ki se položno vzpenja proti vrhu pobočja Vrha. Možnosti, da bi bila nekoč nad današnjo jamo še ena jama, ki je do danes že propadla in iz katere bi bila gruščnato-ilovnata plast počasi presedimentirana v spodnje etaže, ob tem pa bi se ob presedimentaciji v plasti znašli tudi kostni in kulturni ostanki, ki naj bi bili v domnevni zgornji jami, tudi ni. Kako je torej prišlo do zapolnitve rogov Uršnje luknje in kako so se v sedimentu, ki je danes pod stropom in v zapolnjenih manjših rovih, znašli kulturni ostanki? Ena od možnosti je, da je zaradi geoloških vzrokov prišlo do relativno hitrega dviga površja pred jamo in v njej, torej jamskih tal, ob tem pa bi se prvotni sedimenti, ki so bili odloženi na dnu jamskih rogov in na katerih so svoje ostanke pustili tudi kamenodobni obiskovalci jame, dvignili pod strop. Jama bi se s takim dvigom povsem zaprla, kasneje, po ponovni denudaciji dela breče, pa bi se pokazali tako pleistocenski kot paleolitski ostanki, ki so bili prvotno *in situ* v sedimentih jamskih tal. Taki možnosti nasprotuje način, kako so rovi zapolnjeni znotraj jame. Povsem brez dvoma je zapolnitev jame šla v smeri iz zaledja ali platoja nad jamo v jamo in skozi njo na predjamski prostor. V manjših rovih, pod stropom in na koncu spodnjega rova ter v zaključku zgornjega rova, se lepo vidi, kako je gruščnato-ilovnati material skozi stare vodno oblikovane rove pritekal v jamske prostore (slika 5).



Slika 4: Iz breče izlužen artefakt na tleh vhoda v vrhno etažo jame (Foto: P. Jamnik).

Najlaže je to, kar se vidi, opisati s primerjavo z neko ne povsem tekočo, gosto snovjo, ki toliko časa teče navzdol skozi razpoke, dokler ne zapolni vseh praznih prostorov. Pri tem se lahko naenkrat odloži večja količina razmočenega sedimenta, ki tudi kasneje, na primer v današnjem času, v profilih nima opaznih prekinitvev odlaganja. Tako odlaganje oziroma zapolnitev rogov se zgodi ob plazovih s tako imenovanim »drobirskim tokom«, ki je »gravitacijski tok mešanice zemljin, hribin (skal) vode in/ali zraka, ki je sprožen z nastankom plazu pri velikem vtoku vode« (Ribičič, 2000/2001, 102). Ker je osnovne kamenine, v kateri je nastala Uršnja luknja, nad vhodom le še največ nekaj metrov, to pomeni, da bi tak drobirski tok lahko nastal na pobočju nad jamo in pri drsenju pri pobočju nekje naletel na ostanek kamenodobnega tabora, ga odnesel s seboj in, ko je naletel na razpoke, ki so vodile v plitvo pod površjem potekajoče jamske rove, skozi te razpoke stekel v jamo in jo lahko tudi povsem zapolnil (slika 6). V takem primeru bi bili kamenodobni ostanki, ki so se znašli v drobirskem toku, odloženi kjerkoli v jami. Ostanki kosti, ki so bili mogoče v drobirski tok zajeti skupaj s kamenodobnimi ostanki ali pa je nanje naletel drobirski tok v manjših rovih, skozi

kateri je priteknel v jamo in v katerih so bili živalski brlogi, pa bi se v drobirskem toku pomešali skupaj z kamenodobnimi ostanki. Razlaga se je zdela glede na ostanke breče v Uršnji luknji precej verjetna, postavilo pa se je vprašanje, ali na pobočju nad jamo še vedno obstajajo kakršnekoli sledi, s katerimi bi našo tezo lahko podkrepili. Domnevali smo, da bi bil vzrok za nastanek drobirskega toka lahko vsaj občasen izvir, morda hudourniške vode, ki je zaradi nenadnega povečanega pretoka s seboj odplavila okoliški gruščnato-ilovnati material, ta pa je v obliki gostega mokrega drobirskega toka spolzel v jamo. S pregledom terena so se naša predvidevanja potrdila. Nad skalno steno, v kateri je Uršnja luknja, je 360 m oddaljena od jame in okoli 80 višinskih metrov višje v pobočju, na višini 660 m, manjša kotanja (slika 7).

Iz kotanje do roba skalne stena tik nad vhodom v jamo je v terenu mogoče zaznati anomalijo, ki je nedvomno ostanek nekdanjega odtoka vode iz kotanje, neke vrste fosilna struga (slika 8).

Domnevamo, da se je po njej, v toku proti jami ustvaril drobirski tok in z gruščnato-ilovnatim materialom zapolnil jamo. Če bi bil odtok iz kotanje občasen in bi voda večkrat izdajala v kotanji in



Slika 5: Breča je povsem zapolnila nadaljevanje jame v spodnji etaži (Foto: P. Jamnik).

tekla proti jami ter v njej odlagala material, bi se v sedimentaciji v gruščnato-ilovnatih naplavinah v jami pokazala tudi plastovitost breče, ki bi odražala te občasne prekinitev oziroma večkratne zaporedne nanose materiala v jamo. Teh prekinitev sedimentacije pa v breči nismo našli, zato domnevamo, da je bil pojav drobirskega toka enkratno dogodek, ob katerem je zaradi nekega geološkega dogajanja na območju današnjega platoja na dan prišla večja količina vode, ki je na svoji poti proti Podstenjski steni zajela pobočni grušč in ilovico, pri polzenju oziroma zdrsu po pobočju pa na robu Podstenjske stene naletela na razpoke, ki so vodile v takrat obsežnejše rove Uršnje luknje in jih zapolnila. Gruščnato-ilovnati sediment se je kasneje skozi čas sprijel v brečo. Tej razlagi zelo pritrjuje tudi z brečo zapolnjena kotanja na robu Podstenjske stene, le okoli 50 metrov zahodno od Uršnje luknje. Tu je mogoče povsem nazorno videti, kako je drobirski tok drsel s pobočja preko Podstenjske stene in pri tem zapolnil vse prazne prostore, na katere je naletel na svoji poti (slika 9).

Po določenem času je nastopila erozijska faza, v kateri je začel iz jame in izpod Podstenjske stene material erodirati. Nedvomno se je iz jame erodirala že breča in

ne še nesprijeti gruščnato-ilovnati sediment, saj bi drugače po navpičnih stenah danes ne bili vidni ostanki breče, odprl pa bi se tudi še danes z brečo zaprt vhod ob spodnjem večjem vhodu v jamo. Predvidevamo, da se je to dogajalo proti koncu pleistocena ali takoj v začetku holocena, saj je pred nekaterimi manjšimi, z brečo zapolnjenimi rovi v stropu spodnjega rova pred in na breči, zraslo že nekaj kapniških tvorb, ki pa po preliminarni oceni ne morejo biti starejše od časa blizu prehoda iz pleistocen v holocen (slika 10).

FOSILNI KOSTNI OSTANKI IZ URŠNJE LUKNJE

Podatkov o rezultatih Hochstetterjevega in Szombathyjevega izkopavanja leta 1880, kot smo omenili uvodoma, nismo imeli na razpolago. V jami je še danes vidno mesto njunega vkopa, ki se nahaja nekaj metrov za kapom spodnjega vhoda, v še osvetljenem delu jame. Z vkopom sta po nekaj centimetrih ilovice in kosov gruščca oziroma že razpadle breče takoj naletela na sediment, zlepljen v brečo. Kolikor je mogoče ugotoviti iz starega, delno že zasutega vkopa, sta do dosežene globine vkopa okoli enega metra še vedno kopala le v brečo in nista prišla do morebitnih drugačnih sedimentov. Brez dodatnega posega v vkop



Slika 6: Pogled izpod kapa spodnjega vhoda proti nadaljevanju rova. 1, z brečo zapolnjeni rovi v stropu jame, 2, mesto najdbe artefakta v breči, 3, sonda iz leta 1880 (Foto: P. Jamnik).

ni mogoče ugotoviti, ali se v njunem profilu pojavljajo kakršnekoli prekinitve v plasti breče in ali je vkop načel enotno plast. Glede na to, kako so v jami in okoli vkopa ohranjeni ostanki breče, pa skoraj ne more biti dvoma, da sta Hochstetter in Szombathy kopala v brečo, ki se je odložila sočasno kot vsa ostala, kar je je v jami. Iz podatka, da je bil na zapisu o izkopavanju, napisan seznam živalskih vrst, katerih ostanke sta našla pri izkopavanju, je jasno, da se fosilni kostni ostanki živali nahajajo tudi v tu odloženi breči. Od najdenih vrst je za sedaj poznana le omemba snežne sove *Nyctea nivea*, ki pa je že bila predmet strokovne diskusije (Župančič & Mihelič, 2008, 262), zato navedbe o njeni prisotnosti zaenkrat v naši analizi ne upoštevamo.

V zooarheološko analizo smo vključili ves fosilni favnistični material, ki se hrani v paleontološki zbirki Notranjskega muzeja v Postojni. Za potrebe celovite obdelave je Borut Toškan z Zavoda za geologijo in paleontologijo kvartarja pri JAZU v Zagrebu leta 2017 prevzel tudi fosilne ostanke, ki jih je leta 1989 Malezu v determinacijo predal Slavko Polak. Glede

na stanje v jami obstaja velika verjetnost, da je nekaj fosilnih ostankov tudi v lasti različnih zbiralcev.

Del analiziranega fosilnega gradiva je bil izoliran iz breče, del pa pobran na jamskih tleh. Med slednjimi se lahko poleg fosilnih ostankov iz razpadle breče nahajajo tudi kostne najdbe, ki so v jamo prišle šele po ponovnem odprtju rovov, po denudaciji brečaste zapolnitve. Kdaj je do tega prišlo, ni jasno, verjetno pa ne pred koncem pleistocena oziroma začetkom holocena. Že pred analizo je bilo torej jasno, da bo interpretacija gradiva otežena, saj stratigrafska slika ni jasna. Pri predstavitvi tistih kostnih ostankov, ki se od ostalega gradiva razlikujejo po stopnji fosilizacije, to okoliščino tudi izrecno podajamo.

Arheozoolška analiza je zajela 252 ostankov kosti in zob, od katerih jih je bilo mogoče taksonomsko opredeliti nekaj manj kot polovico (tabela 1). Prevladujejo najdbe sesalcev, s sedmimi kostnimi odlomki pa so v gradivu zastopani ptiči. Izmed vsaj 14 prepoznanih vrst sesalcev jih večina jugovzhodni alpski prostor naseljuje še danes, čeprav nekatere (npr.



Slika 7: Kotanja v pobočju nad Uršnjo luknjo, iz katere vodi fosilna struga do Uršnje luknje (Foto: P. Jamnik).

svizec) šele po vnovični naselitvi zaradi predhodnega lokalnega izumrtja (Kryštufek, 1991, 126). Prav tako je na Slovenskem še vedno najti vseh sedem v Uršnji jami dokumentiranih vrst/rodov ptičev (Kryštufek & Janžekovič, 1999). Edina od globalno izumrlih vrst, zastopanih v analiziranem gradivu, je jamski medved.

V nadaljevanju so nekoliko podrobneje predstavljene najdbe posameznih taksonov, pri čemer sistematsko razvrščanje sledi sistemu, ki ga podajata Wilson in Reeder (2005). V nekaterih primerih zanesljiva opredelitev do ravni rodu/vrste ni bila mogoča, zato so te najdbe v tabeli 1 podane ločeno. To, denimo, velja za odlomek dlančnice manjšega rastlinojeda, ki bi utegnila pripadati drobnici ali gamsu. Drugi tak primer je delček razmeroma gracilne jelenje stopalnice, ki bi jo morda lahko pripisali severnemu jelenu. Tri medvedje najdbe (tj. odlomek koželjnice, dlančnice 5 in petnice) so bile opredeljene zgolj kot *Ursus* sp., saj so razmeroma majhne in kot take spominjajo na rjavega ali celó deningerjevega medveda. Med taksonomsko ožje nedoločeni ostanki (N=127) je bilo nekatere mogoče opredeliti vsaj anatomsko. Gre za 34 odlomkov reber, štiri fragmente lobanje ter po en primerek vretenca, lopatice, nadlaktice, stegenice in petnice.

Razred: Sesalci (Mammalia)

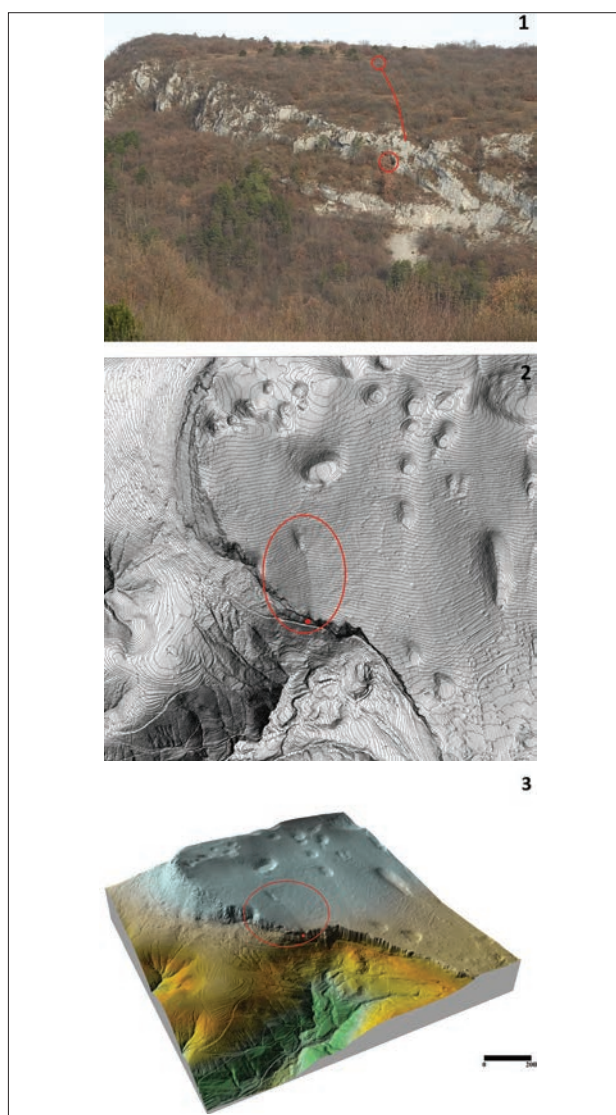
Red: Glodalci (Rodentia)

Družina: Polhi (Gliridae)

Navadni polh (*Glis glis*)

Vrsta je zastopana z eno samo najdbo, in sicer skoraj v celoti ohranjeno spodnjo čeljustnico brez zob. Izmed srednje- oziroma mlajšepleistocenskih najdišč na Slovenskem je navadni polh poznan iz kamnolomov Črni kal in Velika Pirešica, neimenovane jame v bližini Sežane, odkrite med gradnjo tamkajšnjega avtocestnega predora (Aguilar et al., 1998) ter iz Potočke zijalke (Brodar & Brodar, 1983), Divjih bab I (Toškan & Kryštufek, 2007).

Drevesni polh (*Dryomys nitedula*)



Slika 8: 1, Pogled na Podtaborsko steno in pobočje Vrha z označeno lokacijo Uršnje luknje in potekom fosilne struge (Foto: P. Jamnik), 2 in 3, lidarska posnetka območja Podtaborske stene z označeno izvorno kotanjo in fosilno strugo (Vir: ARSO, obdelava Andrej Mihevc).



Slika 9: Breča v kotanji Podtaborske stene nad Uršnjo luknjo (Foto: P. Jamnik).

Drevesnemu polhu je bila pripisana desna spodnja čeljustnica, vključno z zobmi od četrtega ličnika do tretjega kočnika (P_4-M_3). Gre za prvo najdbo te vrste na katerem od slovenskih paleolitskih najdišč, je pa bilo nekaj izoliranih zob vrtnega polha doslej že odkritih v starejšeholocenskih plasteh Viktorjevega spodmola pri Famljah (Toškan & Kryštufek, 2004).

Družina: Veverice (Sciuridae)
Alpski svizec (*Marmota marmota*)

Alpski svizec je zastopan z odlomkom ene od dlančnic/stopalnic in z nepoškodovano petnico. Slednja v dolžino meri 19,5 mm, njena največja širina pa znaša 9,5 mm. Vrsta je bila na Slovenskem prisotna skozi celoten mlajši pleistocen (glej npr. Rakovec, 1973), najštevilčneje pa je zastopana v kontekstih poznoglacijalne starosti (glej npr. Pohar, 1997). S prehodom v zgodnji holocen je svizec v jugovzhodnoalpskem prostoru izumrl.

Red: Zajci in žvižgači (Lagomorpha)

Družina: Zajci in kunci (Leporidae)

Poljski/snežni zajec (*Lepus europaeus/timidus*)

Gradivo: lobanja, vretence, nadlahtnica, koželjnica, komolčnica, stegnenica, golenica, skočnica (2x), stopalnica 5, prva prstnica.

Zajcem je bilo pripisanih enajst najdb, kar ta rod po deležu zastopanosti postavlja na drugo mesto za vodilnim jamskim medvedom. Ločevanje med poljskim in planjskim zajcem je na podlagi morfologije fragmentiranih kostnih najdb zelo težavno. Večinoma neuporabni so v tem smislu tudi zbrani metrični podatki (tabela 2), saj se variacijski širini za posamezno od merjenih dimenzij pri obeh obravna-



Slika 10: Po eroziji in denudaciji breče iz spodnje etaže se je pred ostanki breče v zapoljenih rovih že odložila siga s kapniki (Foto: P. Jamnik).

vanih vrstah praviloma znatno prekrivata (glej npr. Gromova, 1950; Rakovec, 1959). Izmed paleolitskih najdišč na Slovenskem so ostanki poljskega zajca znani le iz Potočke zijalke (Brodar & Brodar, 1983) ter morda Betalovega spodmola (Toškan, Dirjec & Bavdek, 2014), medtem ko naj bi bil snežni zajec v sočasnih kontekstih razmeroma pogost (Rakovec, 1959; 1961; 1962–63; 1973; Osole, 1976).

Red: Zveri (Carnivora)

Družina: Kune (Mustelidae)
Jazbec (*Meles meles*)

Jazbec je v analiziranem gradivu zastopan s po enim odlomkom komolčnice in stegnenice ter z nepoškodovano dlančnico 4. Zbrani metrični podatki so podani v tabeli 3. Vrsta je sicer na slovenskih paleolitskih najdiščih zastopana razmeroma redko (glej npr. Rakovec, 1973; Pohar 1997), z nastopom klimatsko milejšega holocena pa se je velikost lokalne populacije domnevno bistveno povečala (Toškan, Dirjec & Bavdek, 2014, in tam navedena literatura).

Družina: Psi (Canidae)
Lisica (*Vulpes vulpes*)

Lisici so bili pripisani po en odlomek spodnje čeljustnice, okretača in dlančnice 4. Da ne gre za ostanke polarne lisice (*Vulpes lagopus*), je bilo mogoče razbrati iz razpoložljivih metričnih podatkov (tabela 4), v primeru spodnje čeljustnice pa tudi na podlagi lege bradne odprtine (*foramen mentale*) neposredno pod prvim ličnikom. Pri polarni lisici je namreč omenjena odprtina pomaknjena posteriorno pod korenino drugega ličnika (Poplin, 1976).

Lisica je poznana z več paleolitskih najdišč na Slovenskem, kjer pa je praviloma zastopana s skromnim številom najdb. Najstarejši ostanki datirajo v zadnji interglacial, pojavlja pa se vseskozi do poznega glaciala (Rakovec, 1973; Pohar, 1997; Toškan, 2007a). Seveda je vrsta ostala del lokalne favne tudi v holocenu (glej npr. Toškan & Dirjec, 2004).

Volk (*Canis lupus*)

Analizirani zbir arheozooloških ostankov vključuje tri najdbe volka, in sicer po en odlomek prsnega vretenca in petnice ter skoraj v celoti ohranjeno desno polovico medenice. Pri slednji premer medenične sklepne ponvice meri 25,5 mm. Podobno kot lisica je tudi volk s pičlim številom najdb zastopan v favni številnih slovenskih paleolitskih najdišč (Rakovec, 1973 in tam navedena literatura; za izjemo glej Toškan, 2007a).

Družina: Mačke (Felidae)
Divja mačka (*Felis silvestris*)

Gradivo: spodnja čeljustnica (vključuje I₁, C₁, P₃-M₁), nadlahtnica, koželjnica, komolčnica, dlančnica 4, dlančnica 5, stegenica, golenica.

Divji mački je bilo pripisanih osem najdb, ki (vsaj večinoma) zelo verjetno pripadajo istemu osebkju. O tem pričajo še nezraščeni epifizi distalnega sklepa koželjnice in proksimalnega sklepa stegenice, predvsem pa zbrani metrični podatki (tabela 5). Ti namreč presegajo vrednosti, ki jih Kratochvíl (1976) navaja za sodobne divje mačke, in to primerljivo izrazito. Dokumentirani primerek je bil torej bržčas samec.

Zbrani ostanki divje mačke iz Uršnje luknje so dobro ohranjeni. Z izjemo nekaj recentnih lomov, domnevno nastalih med izločanjem posameznih kosti iz breče, jih je namreč večina kvečjemu okrušenih. Na spodnji čeljustnici je na območju jame za zunanjo žvečavko (*fossa masseterica*) prisotna luknja, ki pa je domnevno naravna nastanka (slika 11).

Družina: Medvedi (Ursidae)
Jamski medved (*Ursus spelaeus*)

Gradivo: izolirani zobje (I², 2x I³, 3x P⁴, I₃, P₄, M₁, C), zgornja čeljustnica (vključno s P⁴-M²), spodnja čeljustnica (vključno z M₃), nadlahtnica, koželjnica, komolčnica, zapestna kost, dlančnica 1 (2x), dlančnica

Tabela 1: Popis živalskih ostankov iz Uršnje luknje po taksonih. Količina ostankov je podana kot število taksonomsko opredeljenih primerkov (NISP; Grayson 1984).

Takson / Taxon	NISP
<i>Glis glis</i>	1
<i>Dryomys nitedula</i>	1
<i>Marmota marmota</i>	2
Rodentia gen. indet.	34
<i>Lepus europaeus / timidus</i>	11
<i>Meles meles</i>	3
<i>Vulpes vulpes</i>	3
<i>Canis lupus</i>	3
<i>Canis s. Vulpes</i>	1
<i>Felis silvestris</i>	8
<i>Ursus spelaeus</i>	28
<i>Ursus sp.</i>	3
<i>Equus cf. ferus</i>	1
<i>Sus scrofa</i>	4
<i>Capra hircus</i>	2
<i>Cervus elaphus</i>	4
<i>Capreolus capreolus</i>	6
Cervidae gen. indet.	1
<i>Ovis s. Capra s. Rupicapra</i>	1
<i>Aythya sp.</i>	2
<i>Buteo sp.</i>	1
<i>Tetrao urogallus</i>	1
<i>Scolopax rusticola</i>	1
<i>Strix aluco</i>	1
<i>Columba livia</i>	1
Mollusca	1
Skupaj / Total	122

2, dlančnica 5, stegenica, golenica, (2x), stopalnica 4, stopalnica 5, tretja prstnica (2x).

Jamski medved je daleč najbolje zastopan živalski takson v analiziranem gradivu. Ugotovitev ne preseneča, saj kaže pretežni del kosti in zob te vrste v jamah oz. brlogih pripisati živalim, ki so naravno poginile med hibernacijo. Posledica vsakega takega pogina je hkratni pojav > 200 primerkov kosti in zob, kar je seveda znatno več od zgolj posameznih

Tabela 2: Velikost bolje ohranjenih ostankov poljskega/snežnega zajca v gradivu iz Uršnje luknje. Dimenzije in njihove okrajšave so povzete po von den Driesch (1976). Vsi izmerki so v mm.

Sk. element	Dimenzija Dimension	Izmerek Measurement
Humerus	SD	6,0
	Bd	12,5
Radius	SD	5,5
	Bd	9,0
Ulna	BPC	9,5
Tibia	SD	8,0
Metatarsus 5	Bp	8,2
	SD	3,8
	Bd	5,8
	GL	49,0

ostankov, ki so jih v jamsko zatočišče z vsakokratnim plenom vnesli ljudje oziroma zveri. V skladu s to razlago bi sicer v analiziranem gradivu lahko pričakovali znatnejši delež ostankov mladičev, pri katerih je pogin zaradi nezadostnih količin adipoznega tkiva največji. Ker pa je pobiranje živalskih ostankov v primeru Uršnje luknje vključevalo luščenje najdb iz breče, je bilo zajemanje, denimo drobnih medvedjih mlečnih zob, močno oteženo. V podkrepitev navedene trditve: odlomek zgornje čeljustnice jamskega medveda s slike 12 je največji kostni odlomek v celotnem gradivu.

Metrični podatki za nekatere bolje ohranjene medvedje ostanke so prikazani v tabeli 6. Pri tem je zanimiva ugotovitev, da sta oba odlomka dolgih kosti razmeroma gracilna (glej npr. Jambrešić & Turk, 2007), medtem ko so posamezne dlančnice oziroma stopalnice povsem primerljive z npr. dlančnicami/stopalnicami iste vrste iz jame Divje babe I (Toškan, 2007b).

V zadnjih letih je bilo z arheogenomskimi raziskavami na jamskih medvedih mlajšepleistocenske starosti prepoznanih najmanj šest različnih morfotipov, vendar ostaja njihov taksonomski status nedorečen. Po mnenju nekaterih avtorjev bi lahko posamezne morfotipe razumeli kot samostojne vrste, medtem ko so drugi zadržani že do uvajanja novih podvrst (glej npr. Hofreiter et al., 2004; Baryshnikov & Puzachenko, 2011; 2017). V odvisnosti od izbranega izhodišča bi utegnili medvedji ostanki iz Uršnje luknje tako pripadati (tudi) vrsti *Ursus ingressus* (glej Rabeder et al., 2004).

Družina: Konji (Equide)
Divji konj (*Equus ferus*)

Konj je bil v analiziranem gradivu zastopan z eno samo najdbo, in sicer drobcem krone tretjega sekalca. Zaradi navedenega seveda ni mogoče z gotovostjo izključiti možnosti, da najdba v resnici pripada domačemu konju (*Equus caballus*). Ker je bil ta udomačen šele v osrednjem holocenu, v tukaj obravnavanem gradivu z Uršnje luknje pa je skoraj brez izjeme zastopana zgolj ledenodobna favna, kaže konjski sekalec vendarle pripisati divji vrsti. Zob je fosiliziran in je bil izluščen iz breče.

Red: Sodoprsti kopitarji ali parkljarji (Artiodactyla)

Družina: Prašiči ali svinje (Suidae)
Divji prašič (*Sus scrofa*)

Najdbe divjega prašiča vključujejo primerek spodnjega podočnika, dva odlomka zgornje čeljustnice in distalni del anatomske ožje neopredeljene dlančnice oziroma stopalnice. Zgornji čeljustnici vključujeta posamezne zobe, in sicer četrti mlečni ličnik s prvim kočnikom oziroma prvi in drugi kočnik. Največja širina slednjih znaša 15,0 oziroma 17,5 mm.

Medtem ko je bil spodnji podočnik manjše dimenzije (45 mm) izbit iz breče in je fosiliziran, odlomek zgornje čeljustnice ne kaže znakov fosilizacije in je verjetno prišel v jamo recentno. Najden je bil v preperelini jamskega sedimenta.

Družina: Jeleni (Cervidae)
Jelen (*Cervus elaphus*)

Jelenu so bili pripisani izolirana zgornji četrti ličnik in spodnji sekalec, v celoti ohranjena druga prstnica in odlomek lopatice. Na slednjem so bili prepoznani posamezni vrezji, ki jih je treba pripisati delovanju človeka (slika 13). Gre za edini ugotovljeni nedvoumni primer antropogene modifikacije na kateri koli izmed 252 analiziranih kostnih/zobnih najdb.

Dimenzije druge prstnice in lopatice so navedene v tabeli 7 in v celoti sovpadajo z dimenzijami ustreznih skeletnih elementov pri ledenodobnih jelenih z drugih najdišč v regiji.

Srna (*Capreolus capreolus*)

Srni je bilo pripisanih šest najdb. Zbir vključuje po en odlomek spodnje čeljustnice (vključno s P₃-M₂), koželjnice, medenice, petnice, stopalnice in v celoti ohranjeno zapestno kost. Njihove dimenzije so podane v tabeli 8.

Družina: Votlorogi (Bovidae)
Koza (*Capra hircus*)

Po en primerek prve in druge prstnice sta bila pogojno pripisana kozi. Morfološko se namreč najdbi ne razlikujeta od ustreznih skeletnih elementov koze, medtem ko je skladnost s prvo oziroma drugo prstnico ovce (*Ovis*

Tabela 3: Velikost bolje ohranjenih ostankov jazbeca v gradivu iz Uršnje luknje. Dimenzije in njihove okrajšave so povzete po von den Driesch (1976). Vsi izmerki so v mm.

Sk. element	Dimenzija Dimension	Izmerek Measurement
Ulna	BPC	10,5
Metacarpus 4	Bp	60,0
	Bd	6,5
	GL	30,5
Metatarsus 5	Bp	31,0
	DC	14,0
	SD	9,5

aries), srne (*Capreolus capreolus*) ali gamsa (*Rupicapra rupicapra*) bistveno manjša. Navedene kosti kože niso fosilizirane in so bile najdene na površini sedimenta v osrednjem delu jame. Najdbe ne pripisujemo pleistocenski favni, pač pa so v jamo verjetno prišle recentno. Kostni nog domačih in divjih živali v jame pogosto занесеjo lisice in kune.

Razred: Ptice (Aves)

V kostnem materialu Uršnje luknje sicer prevladujejo najdbe sesalcev, s sedmimi kostnimi odlomki pa so v gradivu vendarle zastopani tudi ptiči. Za razliko od deloma zasigane korakoidnice divjega petelina (*Tetrao urogallus*), so bile ostale ptičje kosti pobrane po jamskih tleh in so lahko recentne ali subfossilne. Taksonomska opredelitev je bila pretežno opravljena s pomočjo primerjalne osteološke zbirke Notranjskega muzeja Postojna.

Red: Plojkokljuni (Anseriformes)

Družina: Plovci (Anatidae)
Potapljavka (*Aythya* sp.)

V pregledanem kostnem materialu smo dobili dve stegenici, od katerih je bila leva nepoškodovana, od desne pa je ohranjen le proksimalni del. Najdbi pripisujemo raci potapljavki rodu *Aythia*. Po velikosti kosti ustrezajo čopasti črnici (*Aythia fuligula*), vendar zaradi pomanjkanja ustreznega primerjalnega materiala določitev do ravni vrste ni zanesljiva.

Red: Ujede (Falconiformes)

Družina: Kragulji (Acciptridae)
Kanja (*Buteo* sp.)

Tabela 4: Velikost bolje ohranjenih ostankov lisice v gradivu iz Uršnje luknje. Dimenzije in njihove okrajšave so povzete po von den Driesch (1976). Vsi izmerki so v mm.

Sk. element	Dimenzija Dimension	Izmerek Measurement
Epistropheus	BFcr	19,5
	BFcd	21,5
	SBV	14,5
Metacarpus 4	Bp	4,4
	Bd	5,4
	GL	39,5

Distalni del leve kračnice (tibiotarsus) pripada kanji. Najverjetneje gre za navadno kanjo (*Buteo buteo*), glede na možnost prisotnosti elementov pleistocenske borealne favne pa bi lahko pripadala tudi koconogi kanji (*Buteo lagopus*), ki je telesno nekoliko večja. Dimenzije najdene kračnice so sicer identične kot pri navadni kanji, katere fosilni ostanki so s širšega območja jugozahodne Slovenije že poznane iz Divjih bab I (Malez, 2007).

Red: Kure (Galliformes)

Družina: Gozdne kure (Tetraonidae)
Divji petelin (*Tetrao urogallus*)

Na verjetno hladnejšo borealno klimo v času odlaganja (vsaj dela) tukaj obravnavanih fosilnih kosti kaže najdba močnejše zasigane in fosilizirane v celoti ohranjene desne korakoidnice (coracoid) divjega petelina. Na podlagi oblike odprtine »foramen pneumaticum« in postavitve okroglega izrastka »processus uncinatus« je druga vrsta kure izključena. Da gre za večjo ptico, nedvomno odraslega samca divjega petelina, kažejo meritve (povzeto po Bocheński & Tomek, 2000): razdalja med akrokorakoidnim in lateralnim apeksom znaša 86,5 mm, medialna distanca 80,0 mm, širina med medialnim in lateralnim apeksom pa znaša 25,0 mm. Na ventralni strani kosti je vidnih več lukenj, ki so nedvomno posledica ugriza manjše zveri, zato bi najdbo lahko opredelili kot ostanek plena. Luknje ugriza so deloma kalcitno zapolnjene in gotovo niso recentne (slika 14).

Fosilni ostanki divjega petelina so bili na Slovenskem že odkriti v jami Divje babe I, kjer so datirani v osrednji del zadnje poledenitve (Malez, 2007). V hrvaški Istri je bila vrsta prisotna tudi še v poznem glacialu (Oros Sršen et al., 2014, tabela 1).

Tabela 5: Velikost bolje ohranjenih ostankov divje mačke v gradivu iz Uršnje luknje. Dimenzije in njihove okrajšave so povzete po von den Driesch (1976). Legenda: L – dolžina. Vsi izmerki so v mm.

Sk. element	Dimenzija Dimension	Izmerek Measurement
Mandibula	M ₁ L	7,8
	P ₃ –M ₁	21,0
	GL	62,5
Humerus	SD	10,5
	Bd	26,0
Radius	Bp	10,5
	SD	10,5
Ulna	BPC	12,5
	GL	156,0
Metacarpus 4	Bp	8,2
	SD	4,7
	Bd	7,0
	GL	49,5
Metacarpus 5	Bp	5,5
	Bd	6,0
	GL	42,5
Femur	SD	8,8
Tibia	SD	9,0
	Bd	14,0
	Dd	11,0

Red: Pobrezniki (Charadriiformes)

Družina: Kljunači (Scolopacidae)
Sloka (*Scolopax rusticola*)

Sloki pripada skoraj povsem ohranjena leva korakoidnica dolžine 31 mm. Vrsta se v območju redno pojavlja v obdobju selitve. V obdobjih hladnejše borealne klime je sloka tu nedvomno številčno tudi gnezdila.

Red: Sove (Strigiformes)

Družina: Sove (Strigidae)
Lesna sova (*Strix aluco*)

Lesni sovi pripisujemo lepo ohranjeno desno dlančnico (carpometacarpus). Celotna dolžina kosti

Tabela 6: Velikost bolje ohranjenih ostankov jamskega medveda v gradivu iz Uršnje luknje. Dimenzije in njihove okrajšave so povzete po von den Driesch (1976). Legenda: L – dolžina; H – višina. Vsi izmerki so v mm.

Sk. element	Dimenzija Dimension	Izmerek Measurement	
Dentes	C ¹ / C ₁ H	78,5	
	M ₃ L	27,5	
	M ₃ B	19,5	
	M ¹ L	24,5	
Radius	Bp	40	
	SD	25,5	
Tibia	SD	26,5	
	Bd	60,5	
	Dd	35,5	
Metacarpus 1	Bp	20	27,5
	SD	12	14
	Bd	16,5	19
	GL	51,5	61
Metacarpus 2	Bp	18,5	
	SD	16	
	Bd	25	
	GL	71,5	
Metacarpus 5	Bp	25	
	SD	17,5	
	Bd	23,5	
	GL	86,5	
Metatarsus 4	Bp	19,5	
	SD	13,5	
Metacarpus 5	Bp	22,5	
	SD	11,5	

znaša 45 mm. Ohranjena dlančnica tako po dolžini (Kessler, 2017), kot morfoloških posebnostih izključuje možnost zamenjave z vrsto malo uharico (*Asio otus*). Lesna sova je v območju še vedno prisotna in pogosto zahaja v vhodne dele jam. Tam ponekod tudi gnezdi, zato najdbe kosti te vrste v kraških jamah niso redke (Polak, 1998; 2000). V jamah so pogosto najdeni tudi izbljuvki lesne sove, zaradi česar je prisotnih tudi precej kosti malih sesalcev in tudi malih ptic v jamskih sedimentih.



Slika 11: Spodnja čeljustnica divje mačke iz Uršnje luknje (Foto: D. Valoh).

Red: Golobi (Columbiformes)

Družina: Golobi (Columbidae)
Skalni golob (*Columba livia*)

Kosti skalnih golobov so nadvse pogostni kostni ostanki, ki jih najdemo v jamah. Distalni del leve podlahtnice (ulna), ki kaže znake fosilizacije, pripisujemo skalnemu golobu. Vrsta pogosto gnezdi v kraških jamah in najdbe teh kosti v jamah niso redke. Ta vrsta še vedno gnezdi v nedostopnih jamah Podtaborske stene, v tako imenovani Luknji v gradu (kat. št. 1179).

Red: Pevci (Passeriformes)

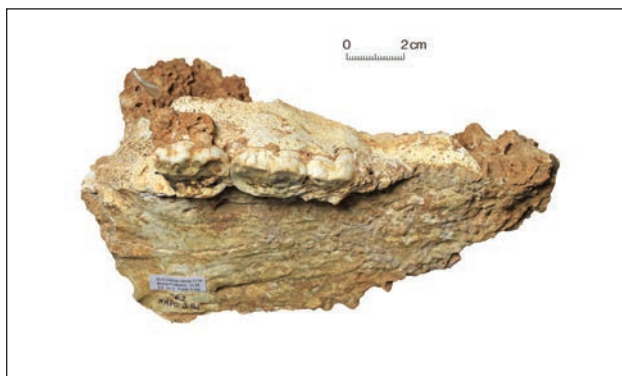
Celotna leva nadlahtnica, dve podlahtnici in distalni del kračnice pripadajo ptici pevki velikosti drozga. Razlike med rodovi in vrstami ptic pevki so majhne (Wójcik, 2002) najdene kosti pa nepopolno ohranjene, zato vrstno še niso opredeljene.

ELEMENTI KAMENE INDUSTRIJE

Večina primerkov kamene industrije, najdenih v kosih breče, je bila odlomljena že ob odbijanju breče s skalne stene. Celih je bilo le nekaj manjših odbitkov. Med vsemi najdenimi primerki je s pomočjo srednjepaleolitske tipologije orodij (Pohar, 1979: 15ss) pet primerkov mogoče opredeliti kot tipološko definirane tipe orodij:

- prečno izbočeno strgalo [23],⁶ retuše so stopnjevite in školjkovite, na dorzalni strani prehajajo v ploskovne (sliki 15, 16:2a);
- izbočeno strgalo [10], spodnja polovica artefakta manjka, (sliki 15, 16:2b). Obe strgali izkazujeta poleg stopnjevite in školjkovite retuše še ploskovno retuširanje po dorzalni strani, kar ju uvršča med strgala tipa La Quina;
- *levallois* konica s fasetiranim talonom [3], konica je odlomljena pri izkopu (sliki 15, 16:2c), zato uvrstitev med konice ni povsem prepričljiva.
- Pri pregledu zgornjega rova sta Jamnik in Blažina tik pod kapom našla več kot do polovice iz breče izlužen *levallois* odbitek [1] (slika 3), ki je imel viden svež odlom baze, ki je nedvomno posledica hoje po odbitku, odbitku pa manjka tudi del talona (sliki 15, 16:1).
- Po breči spodnje etaže Uršnje luknje je v večini odložen tanek ilovnat oprh, ki onemogoča natančen pregled. Nekaj breče brez oprha je le takoj za vhodom, nekako do ostanka Hochstetterjeve in Szombathyjeve sonde. Sredi kopuče breče, ki sili iz zapoljenega rova pod stropom, takoj za vhodom, sta bila najdena odbitek in tipološko opredeljiv nož z naravnim hrbtom [38], (slika 3:2 in sliki 15, 16:3).

⁶ Orodni tip po tipologiji Bordes, 1961, povzeto po Pohar, 1979.



Slika 12: Odlomek zgornje čeljustnice jamskega medveda iz Uršnje luknje (Foto: D. Valoh).

Nad vzporednim, še vedno z brečo zaprtim vhodom v spodnjo etažo, je ozek rov, ki se pne navpično pod strop. Iz rova je že naravno erodirane nekaj breče. Tudi tu je bil v čelu zapolnitve, ki je še v jami, najden en odbitek.

Na vhodu v vrhno etažo, pod vhodom v vrhno etažo in na dveh mestih v z brečo zapolnjenih rovih spodnje etaže smo skupno našli 20 elementov kamene industrije. Poleg zgoraj opisanih tipološko določljivih tipov so med nabranim materialom še odbitki, razbitine in odkruški. Materiala za analizo je malo, vseeno pa tipološko določljiva orodja ter *levallois* in tehnika odbijanja La Quina omogočajo, da najdbe opredelimo v širši srednjepaleolitski, mousterijski kulturni kompleks.

Glede na strukturo kremenca, z veliko verjetnostjo domnevamo, da so se paleolitski lovci s surovino za izdelavo kamnitega oskrbovali na širšem območju današnje Ilirske Bistrice. Tam je v flišnih nanosih mogoče najti kremenove prodnike, ki so povsem primerljivi s kremenom kamene orodja v Uršnji luknji.

DATACIJA ZOB PO METODI U-TH

Zavedali smo se, da imamo iz Uršnje luknje tako paleontološke kot paleolitske najdbe brez zadovoljivih stratigrafskih podatkov, ki bi služili kot vodilo pri časovni umestitvi. Pomagati smo si poskušali z uran-torijevo metodo (U-Th) določanja starosti. Vzorce sta nam v analizo prijazno prevzela vodja laboratorija za analize U-Th Inštituta za geološke znanosti Poljske akademije znanosti v Varšavi, Helena Hercman, in njen sodelavec Michał Gašiorowski, ki je analize tudi opravil. Na tem mestu se jima avtorji za prijaznost in trud najlepše zahvaljujemo.

V analizo smo poslali 4 fosilizirane živalske zobe. Vsi so bili pridobljeni v breči (slika 17).

Dejavnosti urana in torija se določijo z uporabo alfa spektrometra OCTETE-PC, ORTEC.



Slika 13: Odlomek lopatice jelena iz Uršnje luknje. Povečava prikazuje vreze (Foto: D. Valoh).

Po termičnem ločevanju organskih snovi se vzorcem pred nadaljnjo kemično obdelavo doda ^{233}U - ^{236}U - ^{229}Th . Vzorec kalcita se raztopi v dušikovi kislini. Uran in torij se ločujeta od karbonatne matrike po kromatografski metodi s TRU-smolo. Po kemični obdelavi se uran in torij ločita na kromatografski koloni, napolnjeni z Dowex 1x8. Nato se vzorci pred meritvami elektrodeponirajo na jeklenem disku. Starost vzorcev se kalibrira na podlagi izotopskih razmerij $^{234}\text{U} / ^{238}\text{U}$, $^{230}\text{Th} / ^{234}\text{U}$, $^{230}\text{Th} / ^{232}\text{Th}$ in koncentracije urana (ppm). Največje starostno obdobje metode je približno 350 tisoč let.

Nadaljnji postopek, izotopno sestavo meritev U in Th, je Gašiorowski izvedel na Inštitutu za geologijo Češke akademije znanosti in umetnosti v Pragi. Meritve so bile izvedene z masnim spektrometrom ICP z dvojnimi fokusom (Element 2, Thermo Finnigan MAT), pri nizki resoluciji ($m/\Delta m \geq 300$).

Gašiorowski, ki je opravljal analizo in izračune, nam je sporočil, da je bila v vzorcu Z4 za izračun starosti vsebnost torija prenizka. V drugih vzorcih pa je bila vsebnost urana precej visoka, do česar po navadi lahko pride, če so bili vzorci izpostavljeni pogojem „odprtega sistema“, kar pomeni, da vzorci niso bili pridobljeni v intaktnih stratigrafskih enotah, kar je seveda primer tisočletja izpostavljenega breče v Uršnji luknji. Zaradi navedenih vplivov okolja na vzorce je torej treba rezultate razumeti kot približek starosti.

Kljub le okvirno določeni starosti smo z analizo vseeno dobili pomembno oporno točko, ki jo je mogoče primerjati z rezultati zooarheološke analize kosti in tipološke analize kamene industrije.

SKLEPNE UGOTOVITVE

Narava analiziranega skupka živalskih ostankov iz Uršnje luknje je zaradi načina akumulacije najdb žal takšna, da je opredelitev geološke starosti zgolj na podlagi analiziranega gradiva nemogoča. V

Tabela 7: Velikost bolj ohranjenih ostankov jelena v gradivu iz Uršnje luknje. Dimenzije in njihove okrajšave so povzete po von den Driesch (1976). Vsi izmerki so v mm.

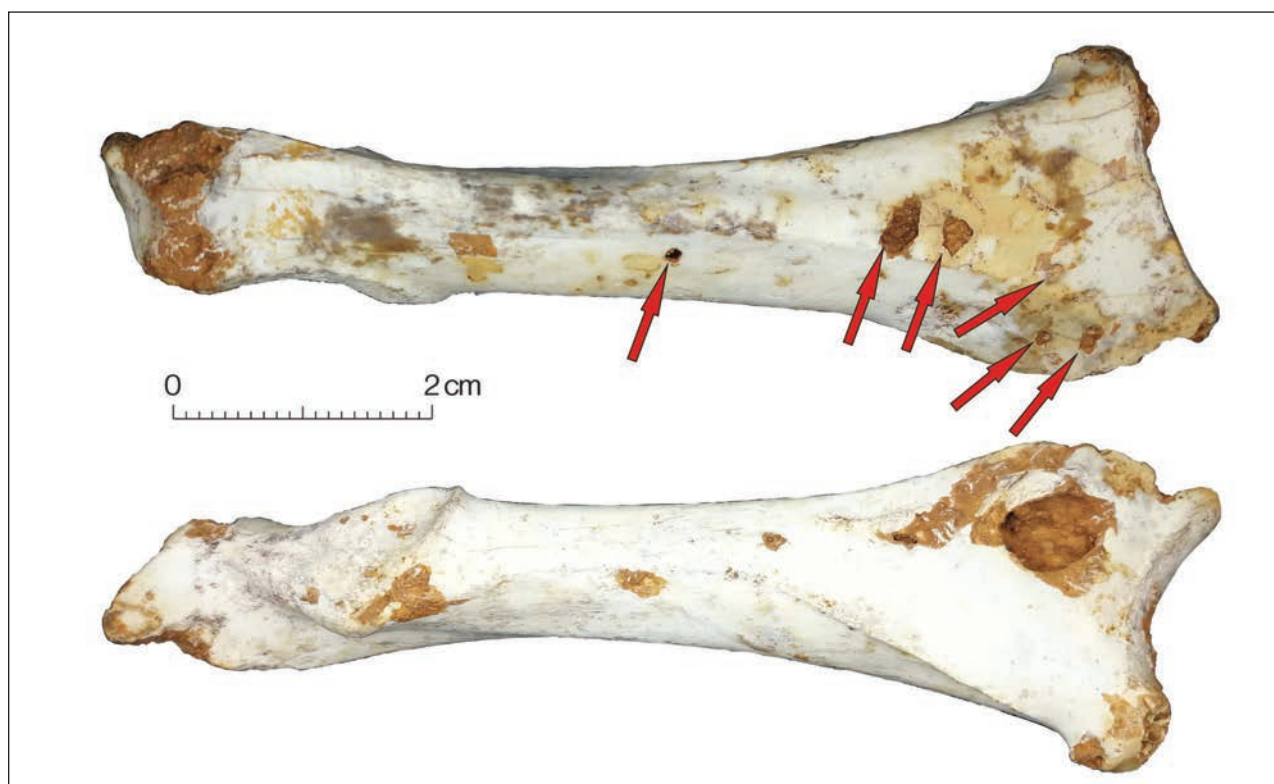
Sk. element	Dimenzija	Izmerek
	Dimension	Measurement
Scapula	BG	45,5
	LG	47,5
	GLP	63,5
Phalanx 2	Bp	21,5
	Bd	18,5
	GL	41,0

Tabela 8: Velikost bolj ohranjenih ostankov srne v gradivu iz Uršnje luknje. Dimenzije in njihove okrajšave so povzete po von den Driesch (1976). Vsi izmerki so v mm.

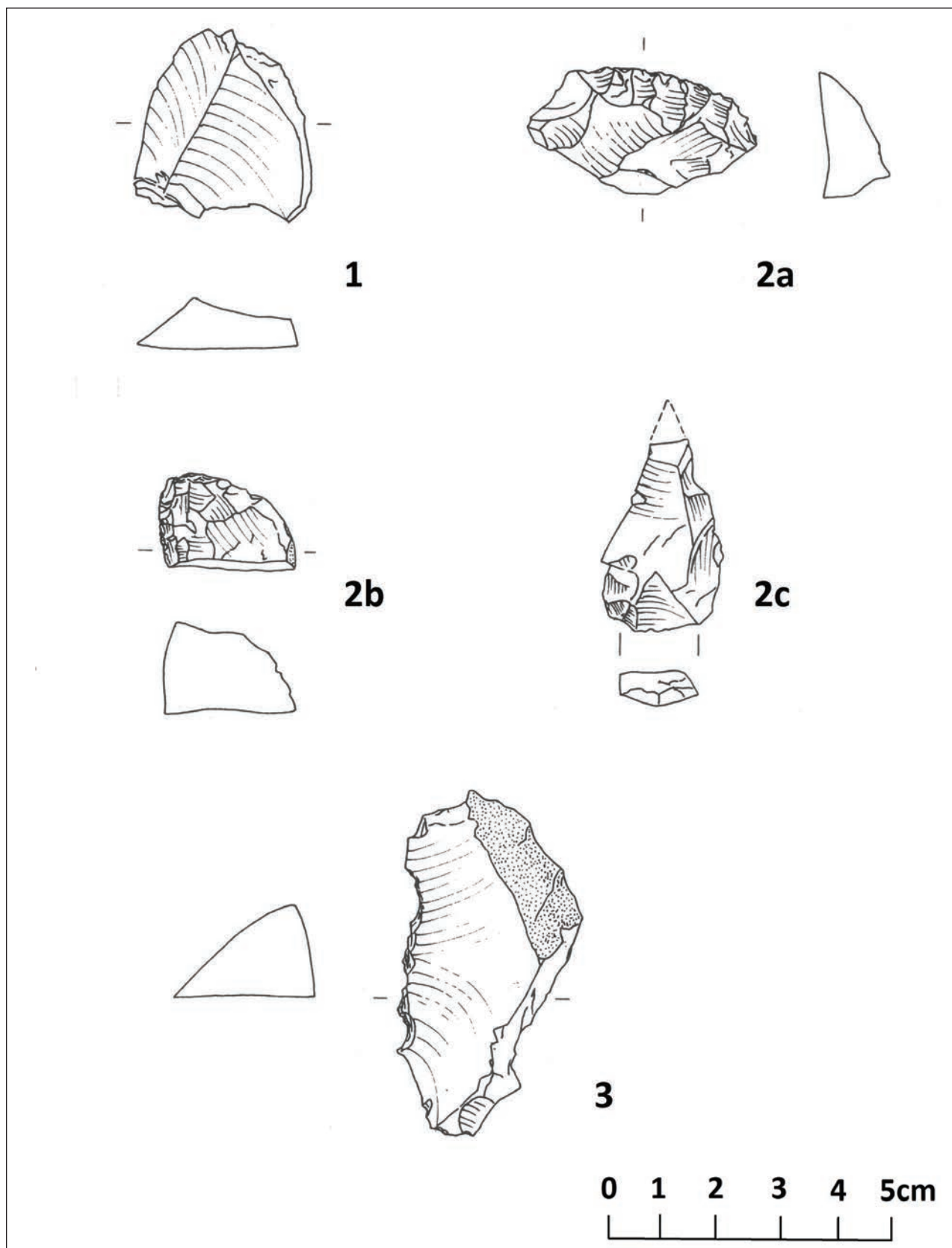
Sk. element	Dimenzija	Izmerek
	Dimension	Measurement
Scapula	SD	17,5
	GL	61,5
	GB	20,5
Phalanx 2	Bp	20,0
	SD	12,5

oporo nam je zato lahko opravljena analiza U-Th starosti treh zob in moustérienski facies najdenih elementov kamene industrije, ki nakazuje, da bi vsaj pomemben del analiziranih živalskih kosti in zob utegnil soditi v obdobje zgodnjega glaciala (tj. OIS 5d -5a). Vrstna sestava gradiva takšni tezi na-

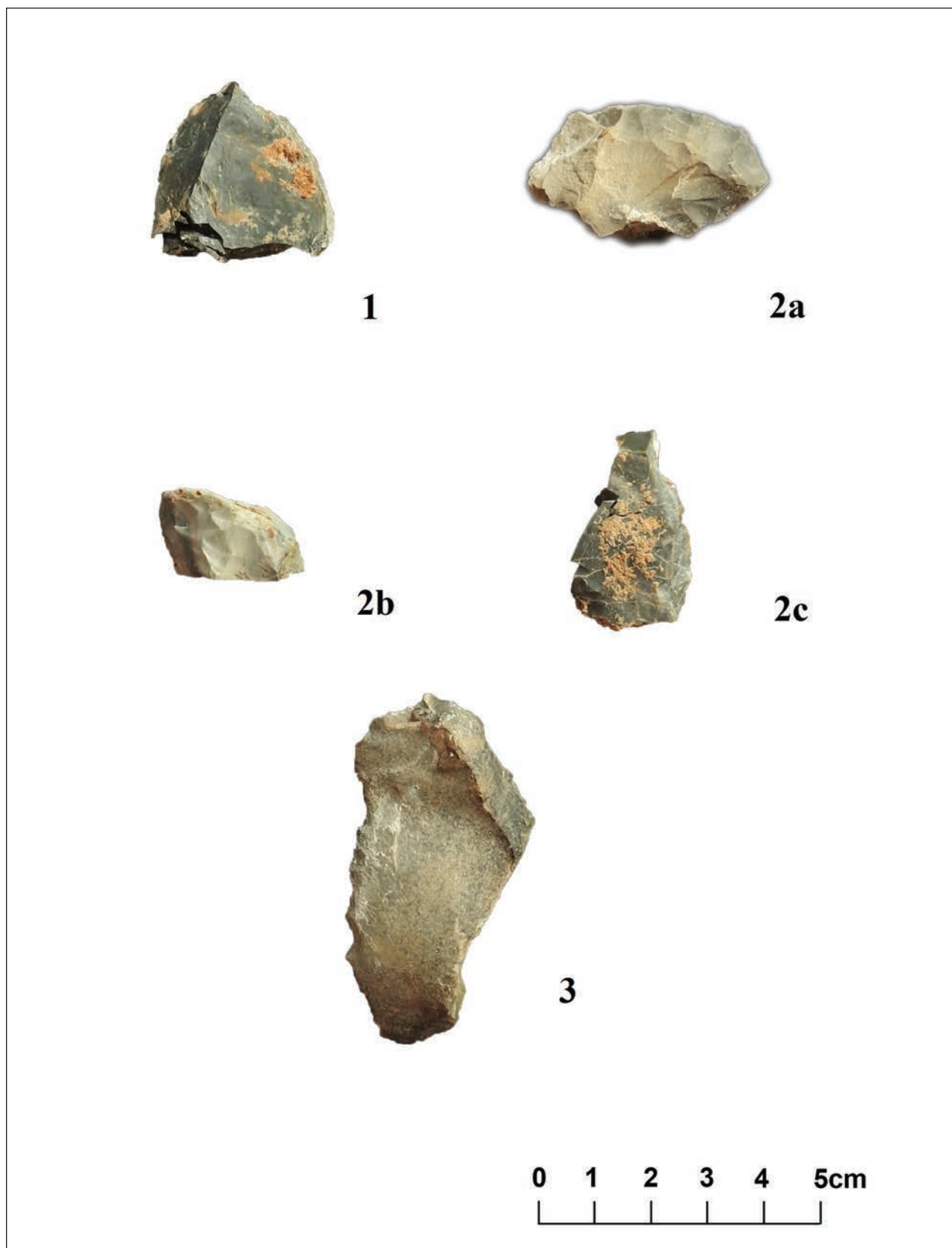
čeloma ne nasprotuje. Pretežni del tukaj zastopanih taksonov je bil na primer odkrit tudi v zgodnjeglacialnih sedimentih iz dobrih 50 km severno ležeče jame Divje babe I (Toškan, 2007a), vsaj nekatere od tam manjkajočih vrst pa so zastopane na nekaterih drugih okvirno sočasnih najdiščih v regiji (glej npr. Rakovec, 1973). Pri tem je pomenljivo, da eventualni časovni umestitvi pretežnega dela



Slika 14: Desna korakarnica divjega petelina (Foto: S. Polak).



Slika 15: Tipološko določljivi elementi kamene industrije (Risba: S. Tomažič, Foto: P. Jamnik).



Slika 16: Tipološko določljivi elementi kamene industrije (Risba: S. Tomažič, Foto: P. Jamnik).

Tabela 9: Rezultati analize U-Th 4 fosiliziranih zob iz Uršnje luknje.

Lab. No.	Sample	U content [ppm]	²³⁴ U/ ²³⁸ U AR	²³⁰ Th/ ²³⁴ U AR	²³⁰ Th/ ²³² Th AR	Age [ka]	Remarks
934	Z4	0.421±0.003	1.032±0.005				
935	Z3	25.0±0.1	1.132±0.002	0.561±0.001	3927±14	88.5±0.3	OS
936	Z2	14.91±0.07	1.208±0.001	0.5825±0.0007	1717±4	92.7±0.2	
937	Z1	37.9±0.5	1.075±0.001	0.4046±0.0009	441±1	56.5±0.2	

analiziranih živalskih ostankov v zgodnji glacial ne nasprotujejo niti ugotovitve o deležih zastopanosti posameznih taksonov. Ob nekaterih vrstah z razmeroma širokimi ekološkimi zahtevami (npr. volk, jamski medved) namreč zbir vključuje večinoma živali vezane na gozd (tj. jelen, divja mačka, jazbec, divji prašič, obe vrsti polha), pri čemer se tudi srna tradicionalno izogiba povsem odprti krajini (Kryštufek, 1991). Pravzaprav so izmed hladnoljubnih vrst v gradivu zastopani edino alpski svizec, divji petelin ter eventualno planinski zajec, konja pa je treba v tem smislu omeniti kot predstavnika stepske favne. Drugih značilnih indikatorjev ostre klime med analiziranimi najdbami ni, npr. polarne lisice, severnega jelena, posameznih vrst hladnoljubnih malih sesalcev (Pohar, 1997; Toškan, 2007a; Toškan & Kryštufek, 2007).

Navedene ugotovitve v zvezi z višjim deležem zastopanosti razmeroma toploljubnih vrst v primerjavi s hladnoljubnimi so relevantne zaradi domneve, da je bilo podnebje v zgodnjem glacialu še razmeroma milo. Za širjenje gozdov naj bi bila tako v tedanjem času glavni omejujoči dejavnik sušnost in ne nizke temperature (glej npr. Toškan & Kryštufek, 2007).

Težava pri časovnem umeščanju najdb je, da so bile nekatere kosti in zobje pobrani na jamskih tleh in je zato njihova sočasnost s kostnimi ostanki iz breče vprašljiva. Poleg tega je zaradi majhnega števila zbranih najdb podajanje verodostojnih ocen o pogostosti pojavljanja posameznih živali v tedanjih združbah zelo nevhvaležno. In slednjič: za vse dokumentirane vrste sesalcev, katerih ostanki so bili pridobljeni iz breče njihova pleistocenska starost ni vprašljiva, saj so bile lokalno prisotne skozi večji del zadnjega glaciala, diahrono pa je nihala predvsem številčnost njihovih populacij (glej npr. Rakovec, 1973; Pohar, 1997; Toškan, 2007a).

Če sprejmemo tezo o zapolnitvi jame z drobirskim tokom, ki je na svoji poti do jame zajel tudi tabor ali vsaj mesto z ostanki moustérienske kulture, se postavi vprašanje, če taki interpretaciji morda ne nasprotuje arheozoološki skupek do sedaj naj-

denih fosilnih ostankov. Največ iz breče izluščenih ostankov pripada jamskemu medvedu, ki je jame uporabljal kot brlog. Prav tako se v jamskih sedimentih po naravni poti lahko pojavijo skoraj vse živalske vrste, ki so v analiziranem gradivu Uršnje luknje. Če torej živalski ostanki ne izkazujejo neke posebnosti v skupkih fosilnih ostankov v jamskih sedimentih, pa sočasnega pojava elementov kamene industrije v zapolnjenih ozkih rovih, pod stropom jamskih rogov in v ostankih breče na skalnih stenah pred jamo enostavno ni mogoče razložiti z običajnimi procesi jamske sedimentacije. Kameno orodje na taka mesta ne bi moglo priti drugače kot s presedimentacijo, iz zaledja same jame, za katero smo ugotovili, da v primeru Uršnje luknje ne pride v poštev, ali pa z zapolnitvijo rogov in jame z materialom iz površja. Kotanja nad jamo, fosilna struga in breča v skalni razpoki nad jamo zelo prepričljivo govorijo v prid enkratni zapolnitvi z drobirskim tokom, ki se je sprožil iz kotanje pod vrhom pobočja Vrh. Ko je drobirski tok na svoji poti po pobočju potegnil s seboj ostanke planega tabora moustérienskih lovcev, ob dotoku drobirskega toka v jamske rove pa zajel tudi živalske kostne ostanke v jami naravno poginulih ali s strani drugih živali, v jamske rove prinešenih ostankov in vse skupaj vmešal v polzeči material, so se v breči znašli skupaj tako živalski ostanki, ki so bili že naravno prisotni v jami kot elementi kamene industrije, ki jih je drobirski tok prinesel s seboj s površja. Številčnost kostnih ostankov jamskega medveda in ostalih živalskih vrst, katerih ostanki so naravno prisotni v jamskih sedimentih zato ne bi bila nenavadna. Ker pa je bilo v planem taboru nad jamo nedvomno prisotnih tudi nekaj kostnih ostankov živali, ki so bile plen moustérienskih lovcev, bi vsaj nekatere jelenove ostanke, nedvomno pa vsaj lopatico z vrezom razumeli kot ostanek lovskega plena moustérienskih lovcev, ki je bil pred sprožitvijo drobirskega toka skupaj s kamenim orodjem nad jamo. V Uršnji luknji imamo torej nenavadno situacijo, saj smo v jamskih rovih naleteli na sedimente s površja, v katerih so ostanki planega kamenodobnega tabora, kar verjetno ni pogost pojav.



Slika 17: Fossilni zobje poslani v analizo U-Th (Foto P. Jamnik).

Glede na način vnosa kulturnih ostankov v jamo je jasno, da si pri ožjem časovnem umeščanju elementov kamene industrije s stratigrafskimi podatki ne bo mogoče pomagati. Zaradi majhnega števila tipološko opredeljivih primerkov kamenega orodja si pri natančnejši dataciji ni mogoče pomagati niti z najdenim kamenim inventarjem. Levallois in La Quina tehnika odbijanja, ki je prepoznavna na nekaj najdenih primerih, pa najdbe nedvomno umeščata v moustérien. Datacija U-Th, ob upoštevanju možnosti napake zaradi izpostavljenosti vzorcev, analizirane zobe umesti v čas, ki se giblje okvirno od 92.000 do 56.000 pr. n. št., kar okvirno ustreza OIS 5b - 4.

V Pivški kotlini in na njenem obrobju so bila do sedaj odkrita številna srednjepaleolitska najdišča (Vilharjeva jama, Otoška jama, Betalov spodmol, Risovec, Postojnska jama in Jama v Lozi) (Brodar, 2009, s tam navedeno literaturo), za katera pa nimamo opravljenih datacij, zgolj na podlagi nekaj elementov kamene industrije pa primerjave niso niti smiselne. Zaenkrat je na podlagi

opravljenih analiz U-Th štirih živalskih zob iz Uršnje luknje mogoče poiskati primerjavo le z najdiščem Divje babe I. Datacija vzorca Z3 in Z2 iz Uršnje luknje (OIS 5b-5a) po metodi U-Th okvirno odgovarja obdobju, ko so se v Divjih babah I tvorile plasti od 18a do 15 v okviru t. i. Facies C (glej Turk, 2014, 160).

Kljub izredno skromnemu paleolitskemu gradivu smo z najdbami v Uršnji luknji potrdili novo paleolitsko najdišče, katerega posebnost je, da se v jamskih sedimentih nahajajo kulturni ostanki planega tabora, ki so ga imeli neandertalci v času zadnjega zgodnjega glaciala nekje nad Uršnjo luknjo. Z opravljeno arheozoološko analizo smo po letu 1880, ko je bilo v jami opravljeno prvo izkopavanje, končno pridobili vsaj nekaj podatkov o zastopanosti fosilne favne na obravnavanem najdišču. Na žalost nam ni uspelo preveriti podatka, ali sta Hochstetter in Szombathy ob prvem izkopavanju našla oziroma prepoznala v izkopani breči morda tudi kameno orodje, saj bi bilo to potem prvo odkrito paleolitsko najdišče v Sloveniji.

THE URŠNJA LUKNJA CAVE IN THE PODTABOR WALL AT ŠEMBIJE REMAINS OF A MOUSTERIAN OPEN-AIR SITE WASHED INTO THE CAVE BY DEBRIS FLOW

Pavel JAMNIK

Kočna 5, 4273 Blejska Dobrava, Slovenia
e-mail: pavel.jamnik@telemach.net

Bruno BLAŽINA

Jenkova cesta 16, 6230 Postojna, Slovenia
e-mail: bruno.blazina@gmail.com

Borut TOŠKAN

ZRC SAZU, Institute of Archeology, Novi trg 2, 1000 Ljubljana, Slovenia
e-mail: borut.toskan@zrc-sazu.si

Slavko POLAK

Notranjska Museum Postojna, Kolodvorska cesta 3, 6230 Postojna, Slovenia
e-mail: slavko.polak@notranjski-muzej.si

Draško JOSIPOVIČ

Oldhamska 1, 4000 Kranj, Slovenia

SUMMARY

The Uršnja Luknja cave is situated at 560 m above sea level, just below the rim of the Podtabor cliff wall, in the vicinity of the town of Ilirska Bistrica (Figures 1, 2). The earliest exploration of the cave dates back to 1880 when Ferdinand Ritte von Hochstetter and Josef Szombathy found some Pleistocene fauna, however, no precise reports of their finds exist. A few fossilised bones were collected from the cave's breccia in the 1980s, and in 2014 and 2015, and elements of stone industry were first observed in the cave's breccia in 2016. The cave has two interconnected levels and each has a separate entrance (Figure 3). The interior of the cave, on both levels, was entirely filled with gravel sediments that developed into breccia. The breccia was later denuded from both levels, probably already in the Pleistocene Era or perhaps soon after the onset of the Holocene period. The sediment fill travelled in the direction from the plateau above the cave and progressed through the cave all the way to the area in front of the cave (Figures 5, 6). This sudden fill of Uršnja luknja cave channels can be attributed to debris flow that began on the slope above the cave and progressed downhill. On its way down, the flow swept a camp set up by prehistoric hunters and pushed the material into the cave's channels. These Stone Age remains were caught by debris flow and were eventually deposited in the cave's channels. The gravel and clay sediment that entered the cave transformed into breccia over time. Some 360 meters away and 80 vertical meters above the location of the Uršnja luknja cave, there is a small basin (at 660 m) featuring an anomaly dropping towards the cave that can undoubtedly be interpreted as the remains of a fossilised streambed (Figure 8). The streambed is believed to have been formed simultaneously with the debris flow. A total of 252 bone and teeth artefacts carved out of breccia and picked from the cave's floor were presented for zoo-archaeological analysis. Slightly less than a half of these were attributed their taxa (Table 1). A great majority of these finds belong to mammals; seven bone fragments were attributed to birds. We identified at least 14 mammal species of which a great majority continue to populate the south-east Alpine area (Figures 11, 14). The only globally extinct animal present in the analysed material is the cave bear. In fact, this species formed a very large portion of the analysed fauna (Figure 12). Also, a fragment of a deer scapula was found featuring a few man-made cut marks (Figure 13). At and below the entrance to the cave's uppermost level and on two locations filled with breccia in the cave's lower level channels, we found a total of 20 elements of stone industry. We believe they can be related to the Middle Paleolithic, Mousterian cultural complex (Figures 15, 16). The sediments of the Uršnja luknja cave contain cultural remains of an open-air site located somewhere above the cave and inhabited by Neanderthals in the Early Glacial Period. The debris flow pushed the remains of the camp into the cave. Considering a margin for error due to sample exposure, the U-Th analysis of three teeth artefacts reveals these finds date back between 56,000 and 92,000 years B.C., broadly corresponding to OIS/MIS 5b-4.

Keywords: Uršnja luknja, Podatborska stena, breccia, Pleistocene fauna, open-air site, Mousterian, U-Th analysis

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BURIALSCAPES OF RAB ISLAND (NORTH EAST ADRIATIC): THE ROLE OF SEPULCHRAL EVIDENCE IN THE RECONSTRUCTION OF ROMAN AND LATE ANTIQUE RURAL SETTLEMENT PATTERN

Ana KONESTRA

Institute of Archaeology, Jurjevska 15, HR-10000 Zagreb, Croatia
e-mail: ana.konestra@gmail.com

Paula ANDROIĆ GRAČANIN

Cardinal Stefan Wyszyński University in Warsaw (UKSW), Institute of Archaeology, Wóycickiego 1/3 (23), PL-01-938 Warsaw, Poland
e-mail: paula.androic@gmail.com

Fabian WELC

Cardinal Stefan Wyszyński University in Warsaw (UKSW), Institute of Archaeology, Wóycickiego 1/3 (23), PL-01-938 Warsaw, Poland
e-mail: f.welc@uksw.edu.pl

ABSTRACT

On the bases of archaeological and documentary data an overview of the burial evidence of Roman and late Antique date on the island of Rab (North East Adriatic, Croatia) is brought forth, spatially analysed and interpreted within the so-far defined rural settlement pattern. While aiding in the definition of burial practices and their diachronic changes, data derived from such evidence and interpreted from a social perspective, can be indicative for continuity and changes within the island's rural landscape organisation.

Keywords: island of Rab, Arba, province of Dalmatia, Roman rural funerary evidence, Roman rural settlement, burial practices

PAESAGGI SEPOLCRALI DELL'ISOLA DI ARBE (ADRIATICO NORDORIENTALE): IL RUOLO DELL'EVIDENZA SEPOLCRALE NELLA RICOSTRUZIONE DEL MODELLO INSEDIATIVI ROMANO E TARDO ANTICO

SINTESI

Sulla base di dati archeologici e documentari il contributo intende fornire una panoramica delle evidenze sepolcrali romane e tardoantiche dell'isola di Arbe (Adriatico nordorientale, Croazia), analizzate nel contesto insediativo extra-urbano finora definito. Definendo le pratiche funerarie e il loro cambiamento diacronico, i dati derivanti da tali evidenze e interpretati in prospettiva sociale, possono essere indicativi della continuità e dei cambiamenti nell'organizzazione dei paesaggi rurali dell'isola.

Parole chiave: Isola di Arbe, Arba, provincia di Dalmazia, tracce funerarie rurali romane, insediamento rurale romano, pratiche di sepoltura

INTRODUCTION

Data derived from funerary evidence and burials can be interpreted in various ways, taking into account monumental and epigraphic features, small finds, anthropological evidence as well as evidence on ritual and spatial organisation of the burials (Botturi, 2016 with earlier bibliography; see also Migotti, 2019, 274–275). Roman funerary evidence can thus be illustrative of belief systems, traditions, communal and self-perception, shedding light on social practices and structure, while the burials, through the reconstruction of rituals, speak of culture and identity (Morris, 1992; Parker Pearson, 1993; Derks, 2011; Migotti, 2019, 279–280). Nevertheless, when regarded outside of its “socio-cultural marker” (Botturi, 2016, 44) funerary evidence can shed light on the organisation of landscape and its diachronic change, which can be interpreted in relation to the wider settlement pattern (Čače, 1981; Parker Pearson, 1993, 206–207; Botturi, 2016, 44). Finally, funerary evidence can be used topographically, as evidence of sites themselves or in relation to other features, being sometimes the only signal of a nearby rural settlement (Kurilić, 2006, 60), or informing us on their extension, and possibly that of their *fundi* (Francisci, 2010, 283; Carre & Tassaux, 2012, 106).

It is these latter aspects that will be the starting point of this research, while the evidence will be regarded in its spatial and diachronic component. We will focus on the association of the collected funerary evidence with that indicative of settlements or other features, in order to propose an organisation of the burials and understand their spatial relationship with settlement organisation, population and perhaps viability (Massa, 1996, 72–73; Esmonde Cleary, 2000, 127, 136–137; Botturi, 2016). By analysing the evidence from Rab island in a larger context, we will try to assess these relationships from the standpoint of our current knowledge on wider regional trends.

SETTING AND DATA SOURCES

Rab island is a mid-sized island of the Kvarner archipelago, located within the northern most inlet of the eastern Adriatic, the Kvarner gulf (fig. 1). The island is characterised by a hilly, rocky and barren north-eastern part and a more flat and densely vegetated south-western part. Here, dense oak forests, maquies and agricultural lands cover most of the sparsely settled landscape. Geology of the island is relatively simple, consisting of two anticlines and two synclines. Cretaceous carbonate

rocks are the oldest outcrops and they are overlain uncomfortably by Eocene carbonates referred to as a ‘flysch’ (Marjanac & Marjanac, 1991; 2007). Within the large flysch plains alluvial deposits created suitable soil for cultivation, while the hilly parts of the island are characterised by carbonates and thus karst, being partly used as pastures. Its relatively small distance from the mainland just as its convenient location within the major regional sea routes insured its connectedness with both the hinterland and the wider Adriatic area from the earliest Antiquity. Suitable environmental requirements for settlement extend from the Upper Palaeolithic when the island was first inhabited, while sparse and sometimes even isolated finds show that it was populated throughout the entire prehistory (Malez, 1974; Batović, 1987a; 1987b; 2003; Rizner, 2012).

In Roman times the island was part of the region *Liburnia*, the northernmost part of province *Dalmatia*, bordering to the west with *Histria* (i.e. the *X regio* of Italy), and is mentioned, as *Arba* or *Arva*, in several historic sources mostly relative to ancient geographers or *itineraria* (Starac A., 2000, 82; Suić, 2003, 426, 435). It is difficult to determine exactly how and when the name of the island originated, but it can be hypothesized that it dates back to no later than the Early Iron Age (see Batović, 1987b, 149–150 with earlier bibliography). At that point in time, hillforts – most common protohistoric types of dwellings on the island dating from the Bronze Age (Batović, 1987b; Glogović, 1989) – already became the hallmark of Rab’s landscape, which is no exception compared to rest of the East Adriatic (Batović, 1985; Batović, 1987a; Čučković, 2017 with earlier bibliography). Only one of the fortified settlements grew to become the urban centre on the island – i.e. *municipium Arba*, nowadays Rab town (Suić, 2003, 222–223; Glavičić, 2009). Old, high ground positions for settlements were almost completely abandoned in the Roman period, while the new ones developed in lowlands, bays oriented towards the sea, or in the central most fertile part of the island (Welc et al., 2019). Besides *Arba*, the remaining settlements can be classified as rural productive and residential complexes (tentatively grouped under the term *villa*, see *infra*).

Since 2013 intense field reconnaissance and survey campaigns have been carried out on the island within the “Archaeological topography of the island of Rab” project with the aim of detecting and digitally mapping all archaeological evidence on the island, creating a tool for multidisciplinary analytical and interpretational approaches to not only the diachronic development of the island’s settlement but also to its landscape.¹ Previous

1 The project was established by the Institute of archaeology in Zagreb, while from 2017 onwards, is conducted in collaboration with the Institute of archaeology of Cardinal Stefan Wyszyński University in Warsaw, and with the participation of the Archaeological Museum in Zagreb just as external collaborators. The project is financed by the Croatian Ministry of culture and media, Cardinal Stefan Wyszyński University in Warsaw, Institute of archaeology in Zagreb, Lopar municipality and Lopar culture centre. Part of the work presented in this article was supported thanks to a grant from the Polish National Science Center (Narodowe Centrum Nauki): The fall, crisis or transformation? Correlation of the late antique settlement pattern changes with environment and climate fluctuations in the north-eastern Adriatic region based on results of geoarchaeological and palaeoclimatic research, ID: 478202 NO. 2020/37/B/HS3/02458.



**Figure 1: Location of Rab island (A. Konestra, basemap: Google Maps).
Slika 1: Lega otoka Rab (A. Konestra, prirajeno po: Google Maps).**

research has, in fact, been scarce and mostly related to prehistoric periods, while Roman sites were rarely tackled by systematic research (Rizner, 2012 with earlier bibliography; Jurković et al., 2012).

Along with archaeological field campaigns, historic and archival sources were consulted in order to collect all data relevant to the reconstruction of the ancient and medieval topography of the island, as well as data on those features or monuments that are nowadays lost or destroyed (Lipovac Vrkljan et al., 2017). Data collected in this way enabled the detection of a large number of previously unknown sites dating to all periods (Lipovac Vrkljan et al., 2016 with earlier bibliography), including several Roman/late Antique rural complexes dotting the island's flysch fields, its south-eastern coastal belt and Lopar peninsula (Welc et al., 2019, fig. 2). Further multidisciplinary research, still in course, has already enabled a more in-depth understanding of several of

these newly identified sites (Konestra et al., 2019; Welc et al., 2019, fig. 2). Nevertheless, full understanding of their nature is still elusive, precluding us to place them within a typology of rural settlements (farms, *villae*, *vici* etc., cf. Leveau, 1983, 922–923; Rothe, 2018; Bertoldi et al., 2019, 192–194), i.e. define them as nucleated vs. sparse settlements, which is in fact always tentative when relying on archaeological, and especially survey data alone (Massa, 1996; Cantino Wataghin et al., 2007; Habermehl, 2013, 10–11; Patterson, 2006, 22–23; Allen & Smith, 2016), especially within a region where such classifications have rarely been applied (Suić, 1996; Zeman, 2014, 35–36).

Such a combined, field and documentary, approach has proven particularly useful in the detection of burial sites and features, as well as in their interpretation within the identified Roman and late Antique rural settlement pattern. In fact, field surveys, while

key to the detection of structural remains and material scatters fundamental to site detection, rarely provide data relevant to the identification of burial features datable to the Roman/late Antique period. Thus, only one of the sites presented here was identified in such a way (see tab. 1: 1).

On Rab the tradition of recovery of ancient monuments, such as in this case *stelae* or sarcophagi, dates to the end of the 19th century when delegates from various museum and the clergy collected a diverse set of monuments now forming the collections of the city's Lapidarium and that of the Monastery of saint Bernardine from Siena in Kampo, while some are also included in those of the Archaeological museums in Zadar and Split (see Nedved, 1990). On the other hand, several monuments stemming from the ancient town of Rab and there reused over the centuries as building materials, have, in the same period, departed the island to be housed in private collections in Venice (e.g. the Nani collection, see Calvelli et al., 2017).² Most of the epitaphs uncovered on Rab have already been published in the *Corpus inscriptionum Latinarum (CIL III)* or in more recent corpora (*ILJug*) and, just as some other epigraphic evidence, in dedicated papers (see in Tab. 1 and Bulić, 1879; Nedved, 1990). Only one fragment of a *stela* is thus far unpublished (tab 1:7).

More precise data on some of these monuments, in particular regarding their find-spots and recovery circumstances, can be found within the first historic narratives on the island, both written by friars of Kampo's monastery, Vladislav Brusić (1926) but in particular in Odoriko Badurina's *Chronicle of Kampo*. The latter has a key role in the attempt of locating sites and features, as its author recorded finds unearthed during agricultural or building works occurring on the island within the first half of the 20th century, which are here treated as uncertain data, as their interpretation is mostly non definitive, especially chronologically.

Finally, a set of data comes from more recent find recoveries just as oral accounts collected and documented during the project's field campaigns. All data gathered in the described way is grouped within Table 1, while find-spots are shown in Figure 2.³ Monuments kept at the Lapidarium in Rab will not be considered, as their findspots are unknown, and while their provenance from yet unlocated urban necropolis is supposed, there is no data to support this with certainty. Thus, attention will be focused on the rural landscape of the island. The island's modern administrative division in several settlements served as the bases for data organisation.

Roman funerary evidence from Rab (both island and town) have so far been investigated in the context of their monumental, artistic, epigraphic and chronological value (Glavičić, 2003; Maršić, 2009, 29–31, 75–78; Maršić, 2012; Cambi & Jarak, 2016; Brogiolo et al., 2017; Lazinica & Maršić, 2017), while it was generally not contextualised in a topographic sense (cf. Kurilić, 2006; Derks, 2011, 115–118). Moreover, in larger regional overviews, no rural necropolis has so far been registered on the island, while overall in the region of *Liburnia* our knowledge on rural necropolises and their features, as well as their relationship with settlements is scanty (Serventi & Jurjević, 2012, 199, 204, fig. 1). Some comparative data does, however, come from single sites' excavations (see *infra*) as well as from the nearby areas of *Histra* and *Dalmatia* (e. g. Girardi Jurkić & Džin, 2002; Kamenjarin, 2014). As for the late Antique period, the unsystematic publication of finds stemming from the island precluded their insertion within regional surveys (Baraka Perica, 2018; Kurilić & Serventi, 2018), while new data has become available only recently.

ROMAN BURIALS IN THE ISLAND'S LANDSCAPE

When the collected data is mapped and analysed typologically and chronologically, but also at the level of (un)certainly, the distribution of evidence in the landscape clearly emerges (fig. 2). Although the presented data is partial and often lacking precisely determined find-spots, while epigraphic and monumental finds often cannot be related to more precise archaeological contexts, it is still possible to interpret it in relation to evidence on rural settlement within the island's micro-regions. Often, as it will be shown, the two types of evidence are concentrated in determined areas signalling a topographic connection. Starting from SE and proceeding towards NW, finds collected in Tab. 1 are in the following paragraphs presented in regard to their spatial distribution and main features.

Barbat area

The modern area of Barbat settlement occupies the south-western, mostly coastal strip of the island. This large area is characterised by a large number of evidences belonging to Imperial period and late Antiquity, though more intense research has so far been carried out only at the st. Cosmas and Damian fort (Jurković & Turković, 2012), located at some distance above the today's settlement. The rest of the evidence dots the strip of land stretching from the hills of the island's northern ridge, being more numerous towards the shore.

² For a distribution and interpretation of *spoliae* within the urban centre see Lipovac Vrkljan et al., 2017.

³ On fig. 2 the sites are represented as a polygon marking the maximum extent of the evidence associate with a single territorial unit (site), as evidenced during pedestrian survey.

Table 1: Certain and uncertain funerary evidence on the island of Rab. Tabela 1: Potrjene in domnevne grobne najdbe na otoku Rab.

N.	Site or findspot	Type of evidence	Current location	Epigraphy	Dating	Source
1.	Pudarica	Excavated grave with evidence of further grave structures in the vicinity (Fig. 3)	/	/	Late Antiquity (4 th -5 th centuries)	Konestra et al., 2017.
2.	Barbat - Environs of st. Stephen	Sarcophagus(i?) (Fig. 4B)	Environs of St. Stephen church	/	Late 5 th -beginning of the 6 th century	Chronicle of Kampor (I, 176); Jarak, 2010, 73-78; Baraka Perica, 2018.
3.	Barbat	Cippus of Liburnian type (Fig. 4C)	Ethnographic collection in Barbat	D M PROCVLO C I VALENTI AN XX OP PROT(=IET?)JICA MA[.] R F PIENTISS [---?] D(is) M(anibus). Proculo / C(ai) l(uli) Valenti[s] (servo), ann(or)um XX, / op(timo?), Proietica (vel Protica) ma[te]r f(ilio) pientiss(im)o? / [...?]	Mid-/ second half of the 2 nd century	Lazinica, Maršić, 2017 with previous bibliography. Possibly found in the sea in front of the location of Ošit spring (Chronicle of Kampor, V, 96). Reused as bollard on a pier close to the cemetery in Barbat (i.e. St. Stephen church) (Faber, 1971).
4.	Banjol-Dražica?	Cippus of Liburnian type	Private	D M BAEIBIAE [---] L GAVILIVS [---] M [.] D(is) M(anibus) / Baebiae [---] / L(ucius) Gavilius [---] / m(atri) [p(osit)].	Mid-/ second half of the 2 nd century	Lazinica, Maršić, 2017; possibly found at location Dražica in Banjöl.
5.	Banjol-st. Lawrence	Personal adornment finds from multiple burial grave (later date ossuary?) - Corinthian type buckles	/	/	7 th century	Brogiolo et al., 2017; Jurković, 2019, 118-119.
6.	Banjol - st. Anastasius/ Za Markovičem	Funerary inscription	Lost	MAGIA IUcULLA ANNOR XVIII H S E Magia Luculla, annor(um) XVIII h(ic) s(itus) e(st)	Early Antiquity?	CIL III, 3124; Nedved, 1990.
7.	Banjol - st. Anastasius/ Za Markovičem	Upper fragment of a stela of the portrait and architectonic type (Fig. 5)	Private	/	1 st century	Unpublished.
8.	Kampor-in the environs of the monastery?	Osteotheca, side with tabula ansata (Fig. 7)	St. Bernardine monastery in Kampor (cloister)	D M S REMMIAE L F MAXIMAE ANNORVM XXVII M XI D XXVII MATER INFE LICISSIMA D(is) M(anibus) s(acrum) / Remmiae L(uci) f(iliae) Maximae / annorum XXVII m(ensium) XI / d(ierum) XXVII mater infe/licissima	First half of the 2 nd century	CIL III, 3125; Schleyer, 1925, 122; Chronicle of Kampor, I, 174; Nedved, 1990.
9.	Kapor/Stipurina, Tudorini house	Funerary inscription	Lost	Several transcriptions exist: IO HIC SITVS EST [] PETOV[] FLAVI[] VIXIT [] SXVII[] E[] EB CLAVDIVS [(IL)Jug-03, 02952] IO HIC SITVS EST [3] / PETOV[3] FLAVI[3] / VIXIT [ANNIJS XVIII]3 / E[3]EB CLAVDIVS [(http://db.edcs.eu/)	Early Antiquity	Nedved, 1990; http://db.edcs.eu/ (EDCS-10101960); https://edh-www.adw.uni-heidelberg.de/edh/inschrift/HD035314 .
10.	Kaštelina-Miral	Fragment of embedded portrait relief (Fig. 6)	St. Bernardine monastery in Kampor (museum)	T BAEIVS T F IVSTVS DEC AN XXXIX TETTIA [] NIS [] AN XXII [] T BAEIVS T F IVSTI [] T(itus) Baebius / T(it) f(ilius) Iustus / dec(urio?) an(norum) XXXIX // Tettia [---]/nis [f(ilia)?] / an(norum) XXI[---?] // T(itus) Baebius T(it) f(ilius) Iust[inus?]	Second half of the 1 st century	Glavičić, 2003; Kurilić, 2006; Maršić, 2009, 30-31, 76-78; Maršić, 2015.
11.	Kaštelina-Miral	Two fragments of embedded portrait relief (Fig. 6)	St. Bernardine monastery in Kampor (museum)	/	End of the 1 st century	Glavičić, 2003; Maršić, 2009, 30-31, 76-78; Maršić, 2015.
12.	Barbat - Environs of st. Stephen?	Sarcophagus	Lapidarium in Rab	/	Second half of the 6 th century	Basić, 2012; Jarak, 2010, 73-78; Baraka Perica, 2018.
13.	Barbat-st. John de Lenona/le Nona	Incineration graves (25-30) in pots or amphorae	/	/	Roman period?	Chronicle of Kampor, I, 751-752: At the beginning of the 20 th c., around the church of st. John de Lenona/le Nona, locals have excavate 25-30 pots or amphorae with ashes. More graves are reported in an unknown location more to the south.
14.	Barbat-Kordiči	Grave made with tegulae	Museum collection of St. Bernardine monastery in Kampor (one tegula)	/	Roman period?	Chronicle of Kampor, V, 95-96: Find of a grave made with tegulae, one stamped (C. AVC. EP. S); previously other supposed graves and small finds; in the environs a Roman stone slab was walled in a house.
15.	Banjol-Snuga	Finds of human bones near ancient walls	/	/	Roman period?	Chronicle of Kampor, V, 103: At the location called "at Snuga" in Banjöl, while digging for a vineyard, a 5m long, 1.5 m deep wall was found, near which previously bones were unearthed.
16.	Kampor-Livera	Finds of human bones	/	/	Roman period?	Chronicle of Kampor, V, 61-63.
17.	Kaštelina-Miral	Graves made with bricks	/	/	Roman period?	Brusić V., 1926, 176-177; Chronicle of Kampor, I, 134-135.
18.	Lopar-st. John the Baptist	Sarcophagi in the environs of the parish church	/	/	Late Antiquity?	The local population mentions finds of sarcophagi during earth works in front of the church of st. John the Baptist in Lopar. Chronicle of Kampor, IV, 573.
19.	Lopar-Lukovac	Sarcophagus with bones and a coin	/	/	Late Antiquity?	
20.	Lopar-Podšilo	Mentions of graves with coin finds	/	/	?	Chronicle of Kampor, I, 136.

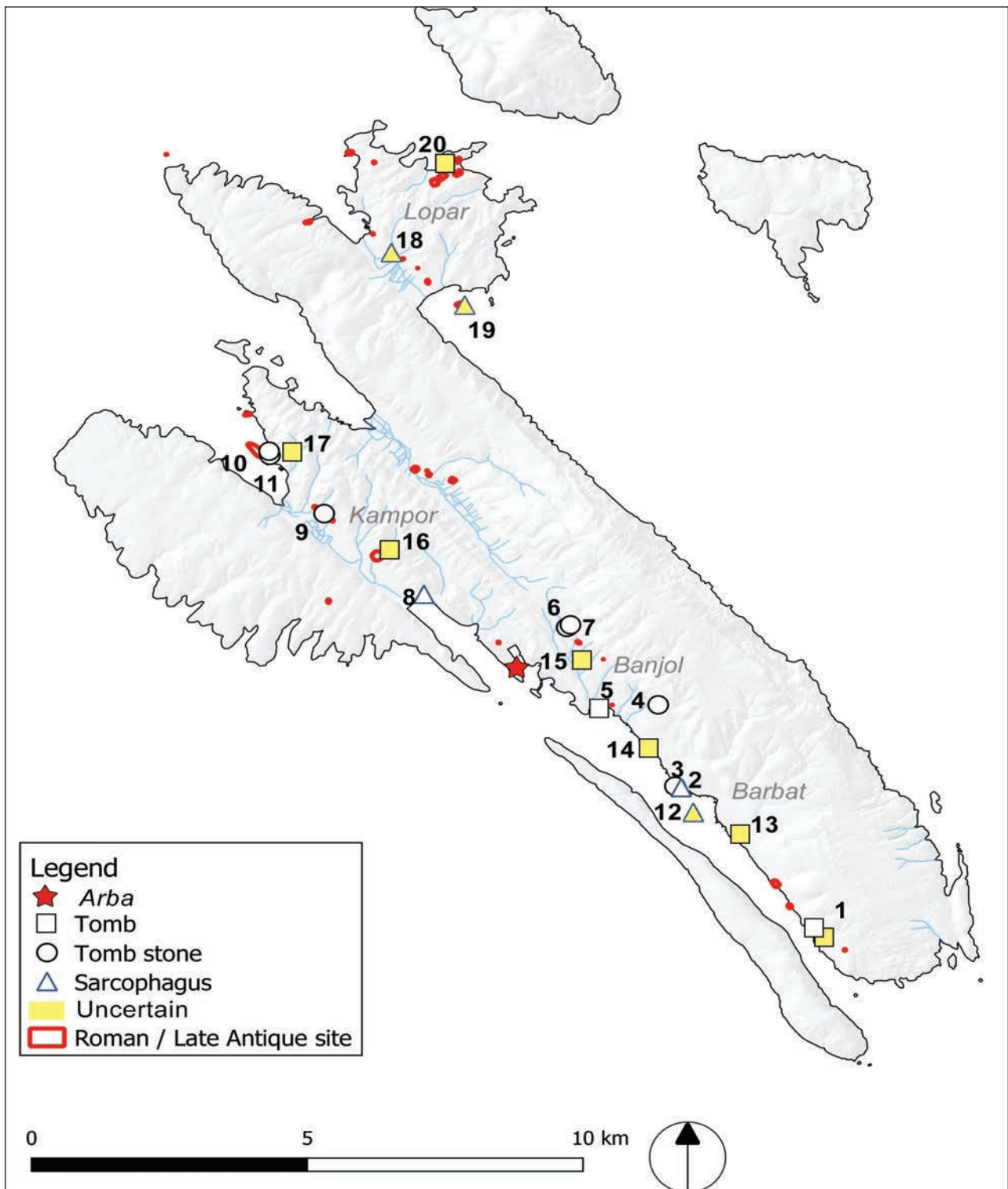


Figure 2: Map with Roman and late Antique funerary occurrences on the island of Rab. For finds' numbering refer to tab. 1 (Image: A. Konestra, basemap: digital elevation model (DEM) from Croatian State Geodetic Administration and The Public Institution Office for Physical Planning of Primorje-Gorski Kotar County).

Slika 2: Zemljevid rimskih in poznoantičnih grobnih najdb na otoku Rab. Za številke najdb glej tab 1. (A. Konestra, prirejeno po: digital elevation model (DEM) from Croatian State Geodetic Administration and The Public Institution Office for Physical Planning of Primorje-Gorski Kotar County).

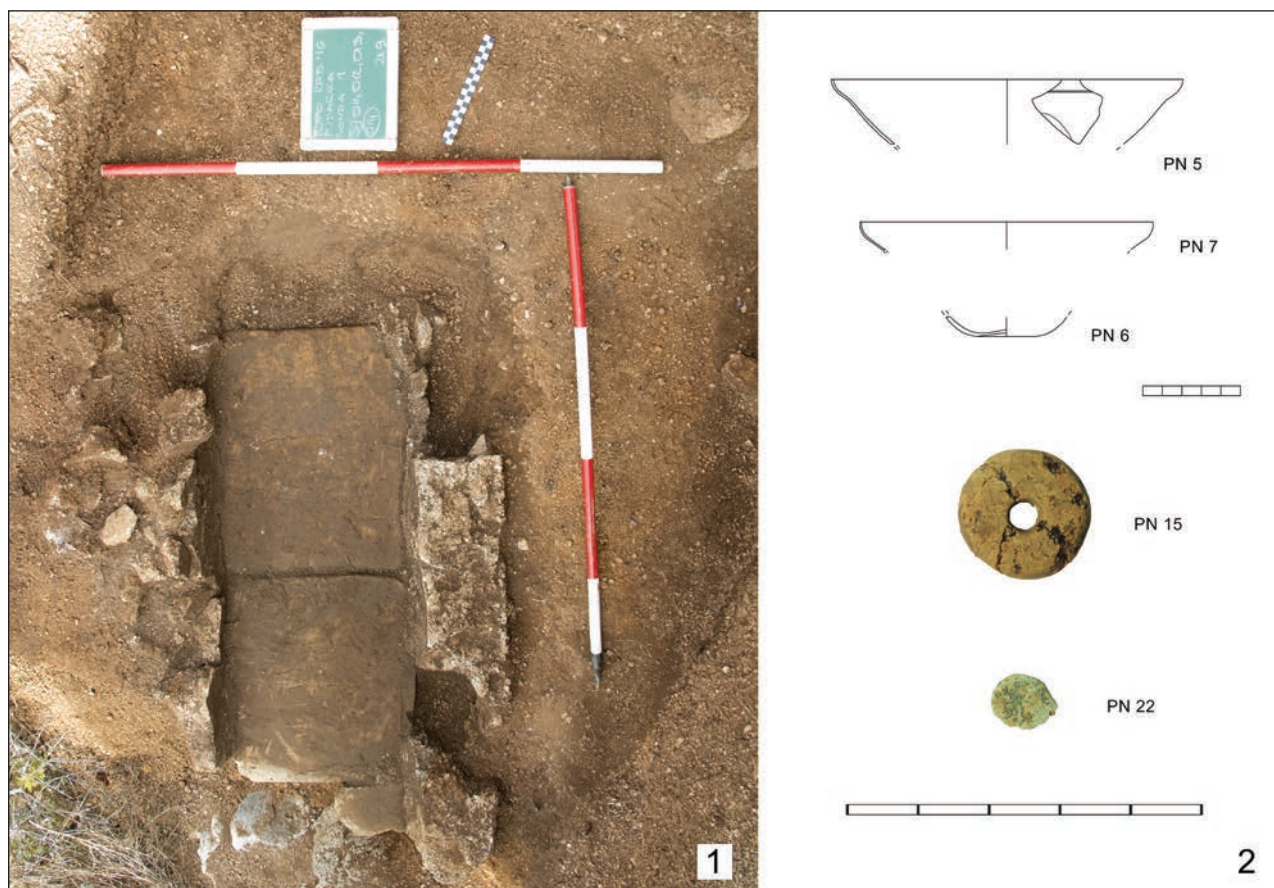


Figure 3: Pudarica (Barbat) – excavated grave (1); finds (2): glass, amber bead, bronze coin (Photos and drawings: A. Konestra).

Slika 3: Pudarica (Barbat) – izkopani grob (1); najdbe (2): steklene posode, jantarna jagoda, bronasti kovaneć (Foto in skice: A. Konestra).

Funerary evidence in Barbat can be grouped around four micro-locations, starting from the southernmost one in Pudarica bay where a grave has been excavated (tab. 1: 1), in the central part of Barbat in the environs of the church of st. John de Lenona (or le Nona) (tab. 1: 13), that of st. Stephen (tab. 1: 2, 12), and further north at the location Koridići (tab. 1: 14). In between, several areas with architectural remains were recorded, such as Mirine/Va(l)martina (Lipovac Vrkljan et al., 2014), Val Pasquala⁴ (Čaušević-Bully & Bully, 2015) and perhaps to the south of tab. 1: 1, just as scatters of material in Barbat bay, its hinterland and around the coastal spring Ošit (Lipovac Vrkljan & Konestra, 2015; Konestra et al., 2018, 126) (fig. 2).

In the first case, a grave (tab. 1: 1), preserved only partially due to a cut by a modern pathway (Rizner, 2012, 39), was excavated, allowing to define its type and chronology with more certainty. Late 4th - early 5th c. dating of the grave can be proposed based on a few sparse grave goods⁵ that were found along with the multiple (subsequent) child burials (Konestra et al., 2017, 105–108) (fig. 3). Its typology - built tomb paved with tegulae and covered with tegulae and imbrices connected by mortar, the latter found destroyed due to the multiple inhumations – supports the proposed dating, and is very common in both the northern Adriatic and in the region (Cipriano & Sandrini, 2015, 235; Cividini, 2015, 320–321; Kurilić & Serventi, 2018, 454). Its

⁴ On different maps the place names are marked differently, rendering the exact location of each toponim difficult (Croatian 1:2500 and 1:5000 maps, Habsburg Empire Second 1851–1854 and Third 1869–1887 military surveys). In the 1828 cadastral map only Val Pasquala is noted in connection to the remains of a possible church, while the area with graves is marked as Artich (Cape).

⁵ The finds include: fragments of glass vessels (Isings, 1956, 144–147, n. 116, 117; Lazar, 2003, 85, n. 2.6.4–2.6.5), an amber bead (e.g. Palavestra & Krstić, 2006, 374–376), an AE 4 coin, a nail, and a small bronze wire. Also, only one bone fragment pertaining to an adult individual was recovered.

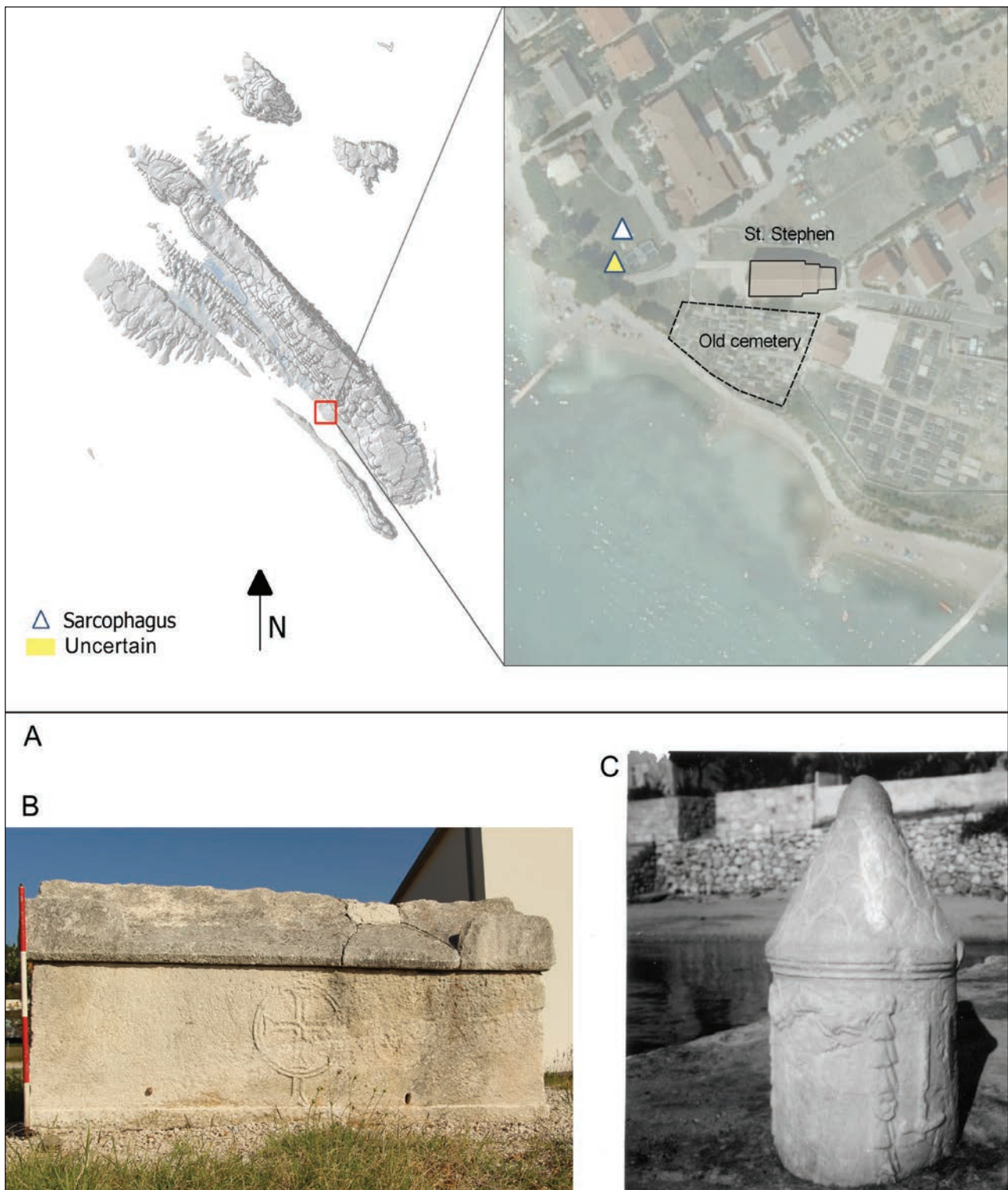


Figure 4: A: Topography of the area of St. Stephen in Barbat (tab. 1: 2, 3); B: Sarcophagus at St. Stephen in Barbat; C: Liburnian cippus used as bollard (Photo: A. Konestra, A. Faber – Archive of the Institute of archaeology, Zagreb – D624; Basemap: DOF/DEM Croatian State Geodetic Administration).

Slika 4: A: Topografija območja cerkve Sv. Stjepana v Barbatu (tab. 1: 2, 3); B: Sarkofag pri Sv. Stjepanu v Barbatu; C: Liburnijski cippus, rabljen kot priveznik (Foto: A. Konestra, A. Faber – Arhiv arheološkog instituta, Zagreb – D624; vir: DOF/DEM Croatian State Geodetic Administration).

walls, erected against the cut in the ground, were built with stone and copious usage of lime mortar, which was also used to cover their internal surface. To the north of the excavated tomb, the disturbed structure of the cover of another analogous burial was identified, pointing to the presence of at least two graves, while scattered pottery located more to the NE and in the profile of the path might point to the existence of more burials. The possibility that this site could be interpreted as a necropolis is perhaps indicated by the fact that multiple subsequent inhumations occurred within the same tomb structure (which then must have been marked) and by a spatial organisation of the burials (e.g. Massa, 1996, 73–74). Also, it might be indicative of a dedicated area for child burials within the burial ground, a feature detected elsewhere in the region (Serventi & Jurjević, 2012, 210–211; Ožanić Roguljić & Konestra, 2016).

To the north of Barbat bay, in the environs of the church of St. Stephen (the current building dates to the 19th c., but it is ascertained that it stands in place of a Benedictine monastery and a probably earlier church), a sarcophagus of the so-called Brač-salonitan type with relief cross on the side was found (tab. 1: 2), dated to the end of the 5th-beginning of 6th c. and, possibly a second one,⁶ from the mid-6th c. (tab. 1: 12) (Basić, 2012; Jarak, 2017, 73–78; Baraka Perica, 2018) (fig. 4, B). Data on the more precise, original location of tab. 1: 2 is provided by the *Chronicle of Kapor* (I, 176), where the accounts of its finding are narrated. It was dug out, sometime between the late 19th-early 20th century, from the narrow strip of land standing between the path that is connecting the parish house and St. Stephan church, to the west of the old cemetery (fig. 4, A). During digging, the locals reported the finding of another sarcophagus, but buried much deeper, which is why it was not dug out. Moreover, in the mid-20th century, during further digging in the environs, a floor made of “regularly laid earthen bricks” was found (*Chronicle of Kapor* I, 176). Findings of walls are also reported by more recent oral accounts (IARH – Arhindoks, D 624–627; Rizner, 2012), some are perhaps still visible in the boundary walls of the cemetery, signalling the presence of structures.

To the north, along the coast from the above-described location, finds of graves, one made with tegulae, are reported by the *Chronicle of Kapor* (V, 95–96) at Kordići (tab. 1: 14), of which one inscribed tegula is still kept in the Kapor Monastery. Similarly, the chronicle reports grave finds (incinerations in

25–30 urns/pots or amphorae) to the south of Barbat bay, close to the church of st. John de Lenona/le Nona (tab. 1: 13), where apparently walls had been unearthed too (*Chronicle of Kapor*, I, 751–752).

Finally, between Barbat bay and St. Stephens church, possibly at the location of Ošit spring (*Chronicle of Kapor*, V, 96), a *cippus* was found in the sea. Whether it is the same, so-called Liburnian type *cippus* later reused on the quay in front of the church is uncertain (tab. 1: 3), but the later certainly stems from the wider Barbat area (fig. 4, C).

Banjol area

Banjol occupies an area of the central part of the island, immediately to the east of the town of Rab and stretching for some 3 km to the north of Barbat. Funerary evidence from Banjol should perhaps include the *cippus* (tab. 1: 4) which was supposedly found in its hinterland.⁷ More certain data is provided by the recently excavated remains of a 5th-6th centuries church with a later interpolation, dedicated to st. Lawrence (Budak, 2006, 123–124; Brogiolo et al., 2017; Jurković, 2019, 118), where, among later evidence, few late Antique (7th century) finds suggest the existence of graves datable to that period (tab. 1: 5). The church, located almost on the shore, is of very large dimensions, and in its environs several accounts mention the existence of walls and foundations (*Chronicle of Kapor*, I, 617; Jurković, 2019, 118–119).

A group of earlier finds stems from the environs of the Za Markovićem site and the late Medieval church of st. Anastasius, that are located on a small hill within the central island's field (the larger area is also known as Caplaca and Snuga) (Lipovac Vrkljan & Konestra, 2015). Here, the funerary inscription of *Magia Luculla* is known from the CIL (III, 3124) (tab. 1: 6), but today it is lost, while recently another tomb stone has been located in private property (tab. 1: 7) (fig. 5). The latter, a *stela* of the architectonic and portrait type with semicircular niche (e. g. Starac A., 2000a, 64; Maršić, 2003, 158–164), lacking the inscription, was reused in the walls of the church, when it was probably also furnished with the *sacrum deu(m?)* inscription on the beam under the frons. The portrait, preserved only partially, presents without a doubt a male figure, and since the *stela* is preserved only in its upper left half (i.e. probably 1/6 of its original dimensions), another portrait can be expected to the right, but it shouldn't be linked with the afore-mentioned dedication (due to the type of

6 The first mention of a second sarcophagus (today displayed in Rab's Lapidarium) being found in the environs of st. Stephen is in Domjan, 2007, 49.

7 The location of the findspot, reported in Lazinica & Maršić (2017), was reconstructed on the bases of the modern cadastre which reports the place name Dražica for several parcels in the hinterland of Banjol, not far from the monument's current location.



Figure 5: Za Markovićem (Banjol) (tab. 1: 7), 1 – location of the remains of the church of St. Anastasius, location of the possible settlement (visible and walls supposed on the bases of GPR) and of a zone with stray finds, from east; 2 – stela from St. Anastasius church (2) (Photos: K. Rabięga, A. Konestra).

Slika 5: Za Markovićem (Banjol) (tab. 1: 7), 1 – lega ostankov cerkve Sv. Anastazija, arheološke lokacije (vidni tudi zidovi, locirani s pomočjo georadarskih meritev) in območja z ostanki keramike, z vzhoda; 2 – stela iz cerkve Sv. Anastazija (Foto: K. Rabięga, A. Konestra).

niche only one row of portraits and one inscription field are supposed). While Magia's inscription is difficult to date as we lack data on its support,⁸ the stela provides enough data to be dated within the 1st c. (Starac A., 2000a, 69; Maršić, 2003, 173–175).

The *Chronicle* (V, 103) mentions another funerary find in the area of Snuga associated to finds of architecture (tab. 1: 15), but the exact location is unclear.

Kampor

Kampor stretches in the south-western part of the island, comprising a large field and adjacent areas. Funerary evidence are grouped in three areas, and the provenance of most can be more or less precisely located.

Three fragments belonging to two embedded portrait reliefs (tab. 1: 10, 11) come from the Kaštelina site (north-western cape of Kampor), more precisely from the shores of the bay Miral located to the east of it (for the monuments and find-spots see Tomičić, 1988, T. 9; Maršić, 2009; 2015; Glavičić, 2003) (fig. 6). Also, finds of tombs made with bricks in the area are reported by Brusić and the *Chronicle*, as well as finds possibly related to grave goods

(tab. 1: 17) (Brusić V., 1926, 176–177; *Chronicle of Kampor*, I, 134–135; see also Glavičić, 2003, 92). The two reliefs belong to two different types of monument, indicating that at least two monumental tombs were erected in the necropolis belonging to the settlement at Kaštelina between the end of the 1st and the early 2nd century AD. If the information supplied by Brusić and Badurina are correct, more simple tombs existed in the same location.

Another funerary monument, testified by its inscription (tab. 1: 9), was found walled in a house in the central part of Kampor field. The location is flanked from east and west by sites presenting traces of pottery scatters and exposed stratigraphy (Konestra et al., 2018).

In the cloister of the Monastery in Kampor the side of an ostotheca with inscription in *tabula ansata* is walled (tab. 1: 8) (*CIL* III, 3125) (fig. 7). The *Chronicle* mentions that it was found somewhere within the monastery's garden (Schleyer, 1914, 122; *Chronicle of Kampor*, I, 174);⁹ the slab was clearly reworked at some point, as a hole was drilled in its lower left corner, which might indicate its use as lintel or doorstep and its probable recovery while already in secondary position. The ostotheca, made

⁸ A dating to the Roman period could be supported by the *hic situs est* phrase which, according to Cambi, is commoner for incineration graves as well as *ara* and *stela* monument types (Cambi, 2010, 35).

⁹ In the environs of the Monastery other decontextualised finds have been noted (Glavičić, 1997, 33), thus allowing for the location of Roman structures not far from it.

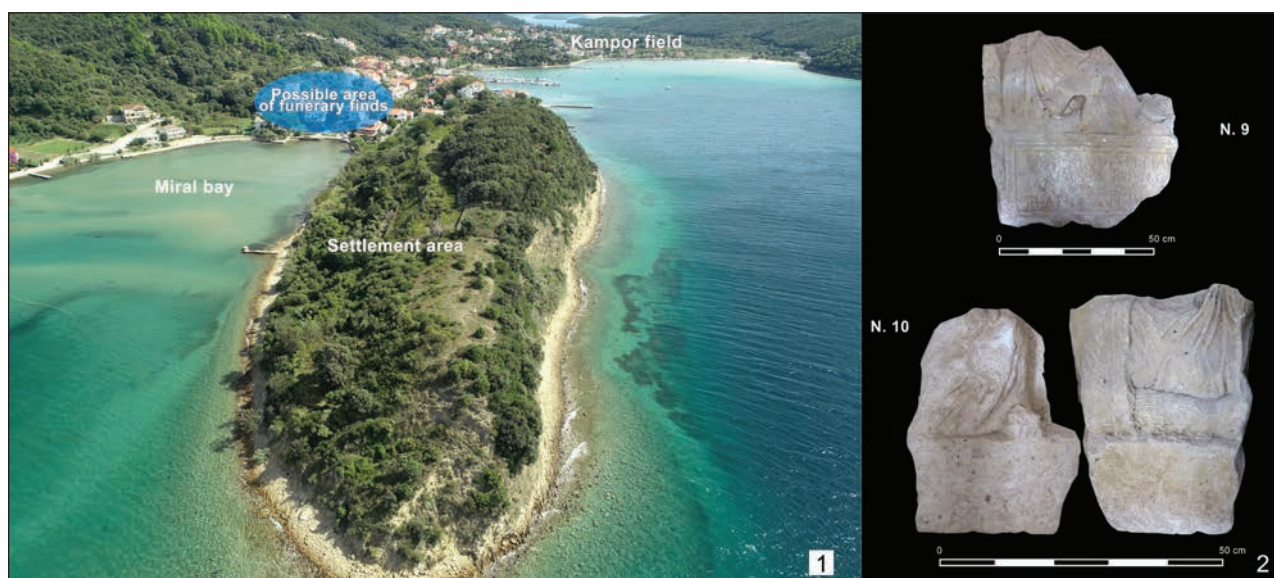


Figure 6: Kaštelina (Kampor), 1 – Locations of the villa site and supposed area of funerary monuments, from west; 2 – the fragments of embedded reliefs recovered at Miral bay (tab. 1: 10–11) (Photo: K. Rabięga, A. Dugonjć).
Slika 6: Kaštelina (Kampor), 1 – lega vile in domnevno območje najdb nagrobnikov, od zahoda; 2 – fragmenti vgrajenih reliefov, najdenih v zalivu Miral (tab. 1: 10–11) (Foto: K. Rabięga, A. Dugonjć).

of limestone, is of a type with *tabula ansata*, common in central *Dalmatia* (Salona) where its production should be placed (Cambi, 2010, 25; 2013), but so far not attested in *Liburnia*. Details derived from the typology and use of the object, just as from the inscriptions, allows dating within the first decades of the 2nd century.¹⁰

The rest of the data related to Kampor is more sporadic and uncertain, mostly stemming from the *Chronicle*, which mentions finds of graves at the Livera site (tab. 1: 16), not far from the location of tab. 1: 8.

Lopar

Lopar peninsula is located in the northern part of the island, and separated from its mainland by the northernmost hilly ridge Kamenjak. In recent years the archaeological topography of Lopar has been substantially enriched with new finds and more detailed data on the known ones. Nevertheless, no certain funerary evidence has so far been identified. During data collection, the local population informed us of the find of sarcophagi in the environs of the parish church of st. John the Baptist (tab. 1: 18) (the current building dates to the XVII c.), apparently destroyed upon discovery (Lipovac Vrkljan et al., 2014, 206). As there is no way to check this data, the information is taken with caution, although further

accounts of finds in its immediate adjacency make it more probable (*Chronicle of Kampor*, I, 136), just as the toponym Cimiter (i.e. cemetery) related to its environs (Lipovac Vrkljan et al., 2014, 206). From the *Chronicle* we are informed of two inscriptions in private collection, at the time of reporting already walled within the village houses, and which might have belonged to a funerary context. The *Chronicle* also mentions a discovery of a grave on the hill “Podšilo”, which can probably be located on either of the two sides of the homonymous bay (tab. 1: 20) (*Chronicle of Kampor*, I, 136). During recent archaeological work within the bay a complex Roman rural settlement was discovered (lastly in Konestra et al., 2020), while reconnaissance of the wider area might however indicate that burials’ location could be sought on its northern slopes, close to stray finds of pottery and one wall foundation located there (Lipovac Vrkljan et al., 2014).

A more probable find, again mentioned in the *Chronicle*, is that of a sarcophagus (tab. 1: 19) recovered within the complex on Lukovac islet in the eastern part of the peninsula. The fact that bones and a coin are mentioned to have been found inside it, and corroborated by the fact that on Lukovac a 6th century church and other structures are present (Čaušević-Bully & Bully, 2015), makes this mention perhaps the most funded of all related to Lopar.

¹⁰ The authors would like to thank prof. Nenad Cambi for his help in identifying the correct function of the monument (i.e. ostotheca vs. sarcophagus) and detailing its possible workshop provenience, and dating. A detailed analysis of the monument will be dealt with in a separate publication (Konestra & Cambi, 2020–2021).



Figure 7: Kapor monastery – ostothea of Remia L.f. Maxima (tab. 1: 8) (Photo and drawing: F. Welc).
 Slika 7: Samostan v Kaporju – ostoteka Remije Maksime, Lucijeve hčerke (Foto in skica: F. Welc).

EXTRACTING DATA FROM THE EVIDENCE – BURIAL CONTINUITY AND THEIR RELATION TO RURAL SETTLEMENT

Through protohistory the typology of burials detected on the island can roughly be divided in burial mounds and flat necropolises. The oldest known burial site is that of Gromačica hill on Kamenjak ridge, above the Lopar field. In 1967 one large tumulus and three other graves were heavily destroyed before rescue excavations. Rather disturbed, imprecise context reinforced with methodologically inappropriate documentation of rescue excavation somewhat limits our understanding of this otherwise exceptional burial site that was subsequently in use from the 9th to 6th century BC (Matejčić, 1968; Kukoč, 2009; Blečić Kavur, 2014). Typology of Gromačica tumulus as well as of the other rescue excavated graves in its vicinity remain unknown, while its association to nearby hillforts is also somewhat speculated due to a lack of excavations. Another context of destroyed tumulus burial was revealed while conducting recent systematic archaeological survey campaigns (Lipovac Vrkljan et al., 2014). Along the ridge, on the Kruna plateau, to the SI of Gromačica, scattered elements of attire and jewellery were collected around a partly ransacked tumulus. These elements of attire dating from the 5th to 4th centuries BC are almost without a doubt damaged grave inventory, regardless of their disturbed context.¹¹

Recent survey together with the old data resulted in recognising more than 20 individual stone burial (?) mounds on Rab, majority of them located in the northern part of the island (Batović, 1985; Rizner, 2012; Lipovac Vrkljan et al., 2014; Lipovac Vrkljan et al., 2016; Konestra et al., 2017). Considering the two aforementioned sites (Gromačica and Kruna) as the only two unearthened tumuli on the island, current state of research therefore cannot allow the interpretation of the rest of the identified stone mounds exclusively as sepulchral monuments (e.g. Mihovilić et al., 2011). They can rather be looked upon within their landscape settings, as in most of the Adriatic zone, defined by their symbolic-functional dichotomy (Čače, 1982; Govedarica, 1989; Mihovilić et al., 2011; Čučković, 2017). The only remaining protohistoric burial site registered on the island is roughly located below the hillfort settlement of Kaštelina which lies on promontory of Stolac in Lopar. The exact position of the necropolis is not recorded, but assumed skeletal remains in crouched position were identified buried under the stone slab, and recognised due to strong erosion that uncovered graves laying in sandy terraces outside the Kaštelina settlement (Batović, 1987b, 160; Brusić Z., 1990, 334; Konestra et al., 2020). Grave good, i.e. attire mostly dated to the 3rd c. BC, were collected but the excavation was not conducted

(see Batović, 1987b; Brusić Z., 1990). Lack of proper documentation or excavations leaves us guessing the possible position of the flat necropolis near the access route to the protohistoric hillfort settlement of Kaštelina.

Early Roman funerary evidence on the island is very sparse and mostly uncertain, both in respect to precise locations as well as to typology of burial, but is in many aspects radically different than that of earlier periods, briefly delineated above. Funerary monuments do, however, offer a glimpse on the organisation and location of rural necropolises, as it is well testified by the Kaštelina example in Kampor. Here, just to the north-east of the *villa* located on Kaštelina cape (Jurković et al., 2012 with earlier bibliography; Jurković, 2019, 121; Jurković & Turković, 2019), within Miral bay, fragments of two monumental tombs point to the location of the necropolis, further indicated by finds of simpler, “brick” built graves (tab. 1: 10, 11, 17) (fig. 6). They were probably arranged along a road leading from the site to the municipal centre (see also in Maršić, 2012, 26), while epigraphy informs us on the owners of one of the monumental tombs, i.e. the *Baebii* family, otherwise known as members of the municipal elite of *Arba* (Glavičić, 2003; 2009). Location, monumentality (and thus expenditure, see Kurilić, 2003) and epigraphy of the monuments allow us to link the *Baebii* to the residence at Kaštelina, and probably to a larger area in the western part of Kampor, where the *praedium* of members of this Liburnian family should be sought (Glavičić, 2003, 93; lastly Jurković & Turković, 2019, 16–17). The location of the necropolis, so close to the settlement and probably not far from the shore finds parallels at Caska on the nearby island of Pag (Kurilić & Serventi, 2018, 772) and Baška on the nearby island of Krk (Bekić & Višnjić, 2008; Marohnić, 2014).

Another recently reinterpreted, a bit later and less monumental, but still more expensive (Kurilić, 2010, 141) funerary monument, enables us to locate a second *Baebii* estate in the hinterland of Banjol (tab. 1: 4) (Lazinic & Maršić, 2017). Unfortunately, as no other data is known from this location, its relation to possible (rural) architectural remains eludes us. Anyhow, such correlation of evidence of an affluent local family - whose members held high ranks in the municipal hierarchy (Glavičić, 2003) - and rural possessions in at least two distinct parts of the island, allows us to link the wealth of early Roman *Arba* more firmly to rural (re)source, as already supposed by previous research (Lipovac Vrkljan et al., 2017, 328).

While the evidence from Kaštelina and Miral is known for some time, a similar interconnectedness of certainly proven rural site with a nucleus of funerary finds (tab. 1: 6, 7) might allow us to locate the centre of another rural property in the Banjol area in the environs of st. Anastasius church. In fact, a hundred meters

¹¹ Dr Martina Blečić Kavur helped with the typological identification and chronological determination of the finds. Hereby we express our gratitude for her help.

from the church, remains of Roman architecture have recently been localised and preliminarily investigated (Konestra et al., 2018) (fig. 5). Small finds date the excavated layers to later Antiquity (perhaps 4th-5th c.), while finds of *dolia* fragments, lumps of *opus signinum* with large stone *tesserae* mosaic and fragments of grinding stones, are all indicative of a rural productive site. To the east of the small stream springing just below the site, more evidence of Roman architecture is present, while to the south stray pottery finds were recovered, allowing us to propose a connection between these sites, whose necropolis should be located more to the north, perhaps along a road stretching towards the large plains located in the north-western part of the island (Mundanijsko polje) (Konestra et al., 2017, 107; Jurković, 2019, 118).¹² Interestingly, funerary evidence points towards early Roman dating, while all other evidence is rather later, thus combined they provide complementary data on settlement duration. Again, apart from the monuments, not much is known on the necropolis, but a certain tenor of its occupants is testified by the portrait *stela* (Kurilić, 2003), whose type might point us to its belonging to an autochthonous (wealthy) Liburnian family (Kurilić, 2010, 139 with earlier bibliography).

On the other hand, a series of evidence suggest the presence of smaller (?) or detached settlements in various areas of the island (tab. 1: 3, 9, 13–16, 19), some stemming from within the Kampor field area or its easternmost bay, and which could have multiple interpretations, further complicated by uncertain dating of most of them. In fact, they could be connected to rural-productive segments of the *fundus* centred at Kaštelina, but could also indicate *praedia* belonging to different owners. Among these, the *ostotheca* of Remmia Maxima (tab. 1: 8, fig. 7), if in fact originating from the environs of the monastery, might point us to the presence of another monumental necropolis at Kampor, as these monuments, similarly to the typologically analogous sarcophagi (Cambi, 2010, 72–80), were used above ground.

Scantier is the evidence for other earlier and mid-Roman necropolises locations - supposed incineration graves around st. John's church at Barbat (tab. 1:13), a grave made with *tegulae* to the north of st. Stephen's church and the *cippus* possibly found just to the south of its - while all are possibly related to architecture or pottery scatters (i.e. possible sites), still they do not offer enough data to draw firmer conclusions. The *cippus* (tab. 1: 3) does, perhaps, offer a glimpse on estate organisation as persons of possibly servile status are mentioned by the epitaph (Lazinica & Maršić, 2017, 193).

Certain data on late Roman funerary practices is less numerous, but perhaps more telling, as it can in some cases be connected to ascertained or supposed

early Christian cult buildings. Nevertheless, evidence provided by the (only) excavated grave at Pudarica bay (tab. 1: 1), tentatively dated to the 4th-5th centuries on the bases of grave goods, and probably pertaining to a wider burial ground, would suggest that this connection happened at a somewhat later date. It would in fact seem that no connection to a church building can be supposed in this case. The uncertain association of the graves with architectural remains in the environs unfortunately precludes understanding settlement-burial relationships (see *supra*), but we might propose that the burial grounds could have been located at the outskirts of a settlement and perhaps along minor viability leading to the easternmost part of the island (Jurković, 2019, 119). In fact, the evidence described for Barbat covers an area of almost 5 km (fig. 2), thus it is difficult to place it within the same context, while the ascertained or supposed typologies of burials would suggest a wide chronology, possibly spanning from early Roman period to most probably the 5th and 6th centuries. Such a concentration of finds might then also point to a diachronic development of the settlement in this area, with more smaller properties later converging in larger ones (perhaps to be located at St. Stephen's and the Valmartina/Val Pasquala area). Evidence grouped around the church of St. Stephen in Barbat, where at least one sarcophagus was excavated (tab. 1: 2), while several others are supposed to have been found (tab. 1: 11 and *supra*), might signal the aforementioned shift in burial locations. Position of the sarcophagi, their type and the consequent late 5th-6th centuries date do indicate the possibility of their interring if not within, then in the close environs of a church building, perhaps in a mausoleum or *memoria* as it is known from several regional parallels (Baraka Perica, 2018, 406–407 with earlier bibliography).

Within the same timeframe belongs the elusive and only documentary evidence of sarcophagi finds from Lopar (tab. 1: 18), especially interesting being those from the islet of Lukovac (tab. 1: 19), but as the data is uncertain, no further discussion is possible.

To a later date belongs the detected funerary function of st. Lawrence church (tab. 1: 5), which might point to the presence of a not only privileged cemetery in relation to this church of substantial dimensions and furnishing (Brogiolo et al., 2017, 673; Jurković, 2019, 119). On the other hand, being the data on adjacent structures scanty (Budak, 2006, 124 and *supra*), it is difficult to define typology and nature of the actual settlement.

The delineated evidence offer the possibility to follow another aspect of funerary practices, that is the changes in burial rite. Evidence for incineration and the probably accompanying tomb furniture (*stelae*, *cippi*) has been

¹² The modern pathway stretching to the south of the site and towards st. Anastasios was recently excavated (Institute of archaeology, directed by A. Konestra), revealing no traces of ancient construction, which does not exclude that viability was present, but its exact course was not maintained unaltered to modern times.

recorded by the *Chronicle* and through monumental evidence, while the passage towards inhumation is marked already in the 2nd c. by the somewhat particular burial rite associated with ostothecae. Inhumation, both in built tombs and sarcophagi, but possibly also in more simple burials (e.g. tab. 1: 5), is so far best evidenced and to the current knowledge marks a period from at least the 4th to the 7th century.

CONCLUDING REMARKS

From this analysis some general conclusions emerge, which will be further detailed taking into consideration the current state of research and tapping into regional and wider parallels, remaining nevertheless tentative and open to elaborations. Roman *Arba* developed from an autochthonous *oppidum* into a Roman *municipium* at a probably early (Augustan?) date, becoming the centre of all autochthonous communities on the island (of which not much is currently known, see Brusić Z., 1990, and e.g. Čače, 2006, 69–70). What emerges from epigraphy is that both early Roman urban and rural settlement on the island seems to respect late Iron age social structure, with local elites now leading municipal affairs and gaining wealth from the countryside through a new, Roman organisation of the economy (for nearby *Curicta* on Krk island see Starac A., 2006, 107–108; Matijašić, 2006, 84). It remains uncertain whether this retraces earlier land organisation (e.g. Migliario, 2010, 102) or signals elite land assignments, although the former could be more probable as elites organised their sepulchral areas within their rural estates, thus possibly residing permanently in the countryside or just furthering their connection to the land and their ancestry (e.g. Suić, 1996, 437–441, 444; Royman & Derks, 2011, 14; Derks, 2011, 117). Similarly, burials of the municipal elite within their rural estates were interpreted in other regions of the Empire in view of the availability of free burial plots and better protection of the tomb, while monumental family tombs might have acted as enhancers of status and identity (Derks, 2011, 116–117). In this respect additional data is provided by monuments typology, which sees elaborate tomb types or in any case expensive tomb stone solutions all of the Roman type and without any detected connection to previous burial practices or spaces, indicating yet again how, while maintaining certain native traits, the autochthonous population was quick in adopting Roman customs, in this case funerary ones, even in rural areas (Dublonić Glavan & Maršić,

2019).¹³ Moreover, the location of funerary areas might be indicative of *fundus* boundaries or settlement nuclei, and be located along communication routes, indicating a sparse territorial organisation of the countryside (i.e. rather *villae* than *vici*), at least within the *fylsch* fields and along the coast.

Funerary epigraphy does not inform us on the successive development of the settlement pattern on the island, mainly due to very few occurrences and the autochthonous naming system being lost through the 2nd c. AD (Starac A., 2006, 108; Kurilić, 2008, 13). Parallels could propose the passage of property to immigrants, as possibly indicated by the italic *nomen* on some epitaphs (tab. 1: 8 and 6) (Kurilić, 1999, 174; Šašel Kos, 2009, 193) or state elites (or even to the Emperor, Starac A., 2006, 110–111), which are testified at *Arba* as well (Kurilić, 2008, 64; Glavičić, 2009; Šašel Kos, 2009, 197). Vibrant rural settling is perhaps suggested by the evidence with wider dating, and topography might indicate a continuation of a basically sparse habitation in the countryside at least throughout the 4th and possibly the beginning of the 5th century. Another constant is the presence of richly furnished graves and the organisation in necropolises or smaller burial grounds.

Substantial changes in the organisation of life and social structure on the island in late Antiquity can be discerned from several historical sources, which inform us on the foundation of the bishopric of *Arba* (certainly attested in the 6th century, but possibly to be dated earlier, and including the nearby island of Pag, Čaušević-Bully & Bully, 2015, 252, 261), but also from the erection of numerous cult buildings¹⁴ and the aforementioned aggregation of funerary evidence traced around some of them, be it certain or supposed. So far no continuity of burial usage has been detected on these sites, but it is present in their environs (for e.g. to the south of St. Stephen, tab. 1: 3), perhaps suggesting a shift occurring due to the erection of the cult space or, for the time span of the 5th–6th centuries, the shift of at least privileged burials (e.g. Migotti, 1994/95, 114; Pettenò & Rossi, 2015, 220; Kurlić & Serventi, 2018, 460). How these new buildings integrated within the structure of the previous and/or wider settlement, which is attested in all occasions at least by documentary sources,¹⁵ is still hard to tell, but it might explain the location chosen for burials. Parallels in Roman *Dalmatia* do see the erection of churches in connection to *fundi*, especially on their margins, on the seashore or in vicinity to communications, but also on the ac-

13 Perhaps late Iron Age – early Roman burial continuity could be expected in necropolis of *Arba*, which is still to be located.

14 Remains of two early Christian churches have been recently excavated (Jurković, 2019), while at least other three are supposed in the island's countryside (Čaušević-Bully & Bully, 2015). Along these, a smaller cult building is present within the fort of st. Cosmas and Damian, and another on the islet of Lukovac (possibly also a fort) (Čaušević-Bully & Bully, 2015). In the town of *Arba*, along with the cathedral, one certain early Christian church is present, while others are supposed on the bases of documentary sources, dedication etc. (Domjan, 2007). As for dating, most are placed within the 6th century, although an earlier date is proposed for st. Lawrence (Brogiolo et al., 2017, 669).

15 Traces of an earlier settlement can be supposed in the environs of other detected early Christian churches on the island (Jurković, 2019).

tual remains of earlier architecture (Migotti, 1994/95, 118–120; Starac R., 2000, 231; Baraka Perica, 2013, 141, 157–158), which have in certain cases been lately connected with public rather than private function and character (Zeman, 2014, 36). In the latter case, the integration of the new building within the tissue of earlier rural settlements is still unclear, as well as their (non) contemporaneity (Zeman, 2014, 37; for other areas e.g. Chavarria Arnau, 2010, 40; Fiocchi Nicolai, 2018, both with earlier bibliography). It would nevertheless seem that the erection of cult spaces marked a (last?) big investment in the countryside of the island in late Antiquity (Lipovac Vrkljan et al., 2017; e.g. Zeman, 2014, 38; Kurilić & Serventi, 2016, 2285; see also Curta, 2013, 151), supported by the investment in burial furnishing, as exemplified by the certain and supposed sarcophagi. Rural churches in Dalmatia have mostly been defined as having a mixed, congregational, funerary, and especially when furnished with one, baptismal function (Migotti, 1994/95, 114, 117; Baraka Perica, 2013), while in some cases they have been connected with a maritime function (Brusić Z., 1993; Čaušević-Bully & Bully, 2015, 262–268), perhaps to be seen in relation to viability in general (Cantino Wataghin et al., 2007, 104). None of the aforementioned does exclude private investment (Fiocchi Nicolai, 2018, 223–224), but whether it might also suggest a concentration of property (see Castrorao Barba, 2014, 277–281, n. 31 with earlier bibliography) is still to be determined, while certainly an aggregational function for the rural population can be supposed, as well as the continuity of stable rural settlement (e.g. Baraka Perica, 2013,

150, 154; Lipovac Vrkljan et al., 2017). In the Kvarner area, a parallel from nearby Baška on the island of Krk, suggest that it is possible that the whole rural community partly invested in the construction of churches (as opposed to one owner of the *fundus*) which had a congregational and a funerary function within the rural settlement pattern (Starac R., 1996; 2019, 31–35; Kurelić & Serventi, 2016; for the possibility see Fiocchi Nicolai, 2018, 223, n. 99). Only further research within late-Roman rural complexes, early Christian churches and burial grounds on the island will help answer the delineated perplexities, especially determining whether the aggregational role of the early Christian churches might signal a development of a less sparse settlement pattern (i.e., a “village”?) or signal changes in rural organisation at the level of ownership (Christie, 2017, 88–89).

Though uncertain, data on funerary evidence within the island’s rural landscape allowed us to delineate a radical shift from protohistory to Roman period, propose the location of burial nuclei, test their connection to ascertained or supposed settlements, propose their diachronic development and use it complementarily so to obtain more certain data on habitation duration, and to finally suggest preliminary social interpretations, open to further elaborations as new evidence will be available. Particularly interesting will be to compare rural and urban situations once more data will be gathered, as their close interconnectedness has already been suggested (Lipovac Vrkljan et al., 2017, 328–329; see Royman & Derks, 2011, 14; Rothe, 2018, 44).

GROBIŠČNA KRAJINA OTOKA RAB (SEVEROVZHODNI JADRANA):
VLOGA GROBIŠČ PRI REKONSTRUKCIJI RIMSKEGA IN
POZNOANTIČNEGA PODEŽELSKEGA MODELA POSELITVE

Ana KONESTRA

Inštitut za arheologijo, Jurjevska 15, 10000 Zagreb, Hrvaška
e-mail: ana.konestra@gmail.com

Paula ANDROIĆ GRAČANIN

Univerza kardinala Stefana Wyszyńskiego v Varšavi (UKSW), Inštitut za arheologijo, Wóycickiego 1/3 (23), 01-938 Varšava, Poljska
e-mail: paula.androic@gmail.com

Fabian WELC

Univerza kardinala Stefana Wyszyńskiego v Varšavi (UKSW), Inštitut za arheologijo, Wóycickiego 1/3 (23), 01-938 Varšava, Poljska
e-mail: f.welc@uksw.edu.pl

POVZETEK

*Zaradi redkih najdb grobov na otoku Rab (severovzhodni Jadran, Hrvaška) je ta tema le redko obravnavana v stroki, raziskave pa se v glavnem osredotočajo na monumentalne najdbe in z njimi povezano epigrafiko. Po za-
slugi arhivskih raziskav, topografskih pregledov, geofizikalnih raziskav in izkopavanj, so bili zbrani novi arheološki
podatki, ki jih je možno prostorsko interpretirati, pripomorejo pa k boljšemu razumevanju lokacije, organizacije
in značaja grobišč iz antičnega in poznoantičnega obdobja. Ko se zbrane podatke poveže s podatki o poselitvi,
jih je možno integrirati v razumevanje organizacije podeželja in njegovega diahronega razvoja. V prispevku so
zbrani vsi doslej znani podatki o rimskih in poznoantičnih grobiščih v podeželskih predelih otoka, ki so integrirani
in dopolnjeni z drugimi dostopnimi podatki, vključno s tistimi o pokopavanju v prazgodovini. Namen je opre-
deliti pogrebne običaje podeželskih otoških naselij (tradicionalno definiranih kot villae). Pridobljeni rezultati so
analizirani iz diahrone in družbene perspektive z namenom, da se evidentira kontinuiteto in spremembe ne samo
pogrebnih običajev, temveč tudi modela podeželske poselitve.*

Ključne besede: otok Rab, Arba, provinca Dalmacija, podeželje, grobišča, naselbine, pogrebni običaji

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KULTURNO IN ZGODOVINSKO SPOROČILO MILANJE – 2. DEL: SV. JURIJ V ILIRSKI BISTRICI IN SV. MARIJA V KNEŽAKU

Ladislav PLACER

Pod akacijami 13, 1000 Ljubljana, Slovenija
e-mail: ladislav.placer@telemach.net

IZVLEČEK

V članku je prikazan ideogram slovanske mitične pokrajine nad Ilirsko Bistrico v zaledju polotoka Istre, kate-rega osrednje božanstvo je ambivalentna boginja Mokoš. V geometrijskem smislu sestavljata ideogram dva lika z delovnimi nazivoma »Sončev krog« in »Mesečev polkrog«, v središču »Sončevega kroga« je Velika Milanja (1099 m), simbolno boginja Mokoš, med drugim zaščitnica voda, živine in pastirjev, skrbi pa tudi za vračanje Sonca v ravnotežno lego enakonočij. V središču »Mesečevega polkroga« je jama v kateri je falus (stalaktit), simbolna podoba boga Jarila, varuha plodnosti in cikličnega obnavljanja življenja. Jama simbolno predstavlja vulvo, verjetno Mokoši, morda Matere Zemlje. V času pokristjanjevanja je cerkev boginjo Mokoš nadomestila s Sv. Marijo, Jarila pa s Sv. Jurijem.

Gljučne besede: slovanska mitična pokrajina, Mokoš in Jaril, upravno in versko središče zgodnj srednjeveške slovanske kneževine, sedež kneza Knežak, Ilirska Bistrica, zaledje Istre

MESSAGGIO CULTURALE E STORICO DI MILANJA – PARTE 2: SAN GIORGIO A ILIRSKA BISTRICA E SANTA MARIA A KNEŽAK

SINTESI

L'articolo presenta un ideogramma del mitico paesaggio Slavo sopra Ilirska Bistrica nell'entroterra della penisola istriana, la cui divinità centrale è la dea ambivalente Mokoš. In termini geometrici, l'ideogramma è composto da due figure con i titoli provvisori "Cerchio solare" e "Semicerchio lunare". Al centro del "Cerchio solare" si trova monte Velika Milanja (1099 m), simbolicamente la dea Mokoš, che è, tra l'altro, protettrice dell'acqua, del bestiame e dei pastori, e si occupa anche di riportare il Sole nella posizione di equilibrio degli equinozi. Al centro del "Semicerchio lunare" si trova una grotta contenente il fallo (stalattite), immagine simbolica del dio Jaril, custode della fertilità e del ciclico rinnovamento della vita. La grotta rappresenta simbolicamente la vulva, probabilmente da Mokoš, forse da Madre Terra. Al momento della cristianizzazione, la chiesa sostituì la dea Mokoš con Santa Maria e dio Jaril con San Giorgio (Jurij).

Parole chiave: paesaggio mitologico slavo, dea Mokoš e dio Jaril, centro amministrativo e religioso del principato slavo altomedievale, la sede del principe Knežak, Ilirska Bistrica, entroterra dell'Istria

UVOD

V drugi številki revije *Annales, Series Historia et Sociologia* leta 2020, je bila v članku *Kulturno in zgodovinsko sporočilo Milanje*, obdelana slovanska mitična pokrajina nad Ilirsko Bistrico (Placer, 2020). Iz razporeditve mitičnih objektov v prostoru je očitno, da je bila vezana na geomorfologijo velikega rotacijskega fosilnega plazju, natančneje na polkrožno sleme in polkrožno pobočje, ki sta nastali iz odlomnega roba plazju. Pripadniki naravnih kultov so videno simbolno primerjali s polmesečem. Na polkrožnem slemenu se nahajajo vrhovi in druge morfološke oblike, ki imajo mitična imena: Milanka (792 m), Mala Milanja (983 m), Velika Milanja (1099 m), Devin 2 (1088 m), Volovja reber in Baba. Poleg imenovanega Devina sta tu še dva, Devin 3 (957 m) na polkrožnem pobočju in Devin 1 (1028 m) izven območja plazju. Lege omenjenih objektov so povzete po Franciscejskem katastru (1823, 1824), v Atlasu Slovenije in Atlasu okolja je drugje locirana Milanka in ni Male Milanje, očitno gre za napaki. Iz nepoznanega vzroka ni tudi Devina 3 (sl. 1).

K naštetim mitičnim objektom iz prvega članka, so sedaj dodani še trije, ki ležijo sredi mase plazju in že na prvi pogled blizu središča slemenskega polkroga. To so Trnovski studenec, Japodska jama in Zelene doline. V Franciscejskem katastru ni zabeležen nobeden od teh, Japodska jama je bila poimenovana po »ponovnem odkritju« leta 2000 (Kataster jam), vendar so jo po izjavah domačinov pastirji od nekdanj vseskozi obiskovali.

Med zahodnim pobočjem Milanke in Šembijami leži ledina Nariče, ki je po hudih neurjih običajno močno prizadeta, ob izredno visokih poplavnih vodah pa nastane tu samostojno Šembijsko presihajoče jezero. V Franciscejskem katastru je ime ledine zapisano dvakrat Noritsche in enkrat Norizhe, torej Noriče. Gospa Jožica Samsa (roj. 1943, končala administrativno šolo) iz Šembij št. 7, je povedala, da danes domačini pravijo tej ledini Nariče, tako kot njeni starši in stari starši. V pisni obliki se uporablja namesto polglasnika samoglasnik a, vendar se je po njenem mnenju ta uveljavil zaradi potrebe po normiranem zapisu, ne pa zaradi znanega izvornega pomena besede. Izbrali so pa Nariče zato, ker so jim Noriče zvenele tuje. Tako samoglasnik o v Franciscejskem katastru po vsej verjetnosti ni verodostojen, zapisovalci niso pisali polglasnikov, za nekaj se je pač bilo treba odločiti.

Etimologija Norič bi bila drugačna od etimologije Narič, v slednjem primeru bi ime lahko izhajalo iz naricanja, saj bi se kraju kjer se narica lahko reklo Nariče. Naricanje se v narečni obliki izgovarja naričanje, to pa po analogiji napeljuje na Nariče. Če bi bilo tako, bi bil ta prostor lahko del mitične pokrajine. Vzrok za tako domnevo je pojasnjen na koncu prispevka.

VELIKA MILANJA – USMILJENA BOGINJA MOKOŠ

V tem poglavju so na kratko povzete ugotovitve iz prvega članka (Placer, 2020). V njem je bil obdelan

mitični ideogram v katerega središču je Velika Milanja, ki simbolno predstavlja usmiljeno boginjo Mokoš (sl. 2). Oddaljenost Velike Milanje od Male Milanje, Devina 1 in Devina 2 je v mejah dopustne tolerance enaka, zato lahko zarišemo krog, ki ima mitično središče na Veliki Milanji, geometrijsko središče pa nekoliko stran. Določeno je bilo s šestilom, krožnica okoli tega pa zajema vse tri omenjene vrhove. Znotraj tako zarisane kroga lahko izrišemo veliki včrtani obodni enakokraki trikotnik in dva manjša včrtana središčna enakokraka trikotnika. Velikost njunih simetričnih kotov se nahaja v mejah obrednega kota $23,5^\circ \pm 1,5^\circ$. Velika Milanja leži na simetrali kota v vrhu včrtanega enakokrakega obodnega trikotnika, ki obsega seštevek dveh obrednih kotov. V simbolnem pomenu torej leži usmiljena boginja Mokoš v legi pomladnega in jesenskega enakonočja, kar pomeni, da nadzira in usmerja navidezno gibanje sonca med poletnim in zimskim obratom. Leži torej v ravnotežni legi sončevega nihala in skrbi, da se to vanjo neprestano vrača.

Na polkrožnem slemenu, simbolnem polmeseču, ležijo Milanka, Mala Milanja, Volovja reber, Velika Milanja, Devin 2 in Baba. Devin 3 leži na polkrožnem pobočju, zato je geomorfološko in vsebinsko del simbolnega polmesečca. Mokoš je ambivalentna, ima lastnosti sončnega in lunarnega božanstva in taka je tudi njena simbolna lega. Leži namreč v središču kroga, ki ga zaradi nadziranja nihanja Sonca in lažjega sporazumevanja imenujemo »Sončev krog« in na polkrožnem slemenu, simbolnem polmeseču, ki ga iz istega vzroka imenujemo »Mesečev polkrog«.

Razlaga mitološkega pomena Milanke in Male Milanje ni tako jasna, Baba je del substrata, Slovani so jo po nekaterih lastnostih v splošnem povezali z Mokošjo (Hrobat Virloget, 2012). Če upoštevamo ideje Pleterskega (2020), bi Velika Milanja, Mala Milanja in Milanka lahko bile različne podobe istega ženskega božanstva, torej Mokoši. Vsi našteti mitični subjekti so zasedli mesta in vloge božanstev predslovanskih častilcev naravnih kultov, Slovani so jim dali le imena iz svojega mitičnega panteona. Svoje naj bi ohranila le Baba. Geometrija »Sončevega kroga« je bila v prvem članku obdelana natančneje, geometrija »Mesečevega polkroga« pa je ostala nedorečena.

»MESEČEV POLKROG«

Vsaka krožnica ali polkrožnica je določena s središčem in polmerom. V mitični pokrajini se geometrijsko središče kroga lahko ujema z mitičnim središčem ali pa se središči ne pokrivata, vendar je neskladje med njima dopustno le do določene meje. Dopustna toleranca v tem primeru ni znana, verjeten vzrok pa je majhno število podobnih konstrukcij. Pri »Sončevem krogu«, razen s šestilom, lahko geometrijsko središče poenostavljeno izračunamo iz razlike med srednjo dolžino treh izmerjenih radijev in najkrajšim radijem. Dolžina radijev znaša po Placerju (2020, sl. 11) 1999 m, 1985 m in 1916 m, srednja vrednost znaša 1967 m, velikost približne

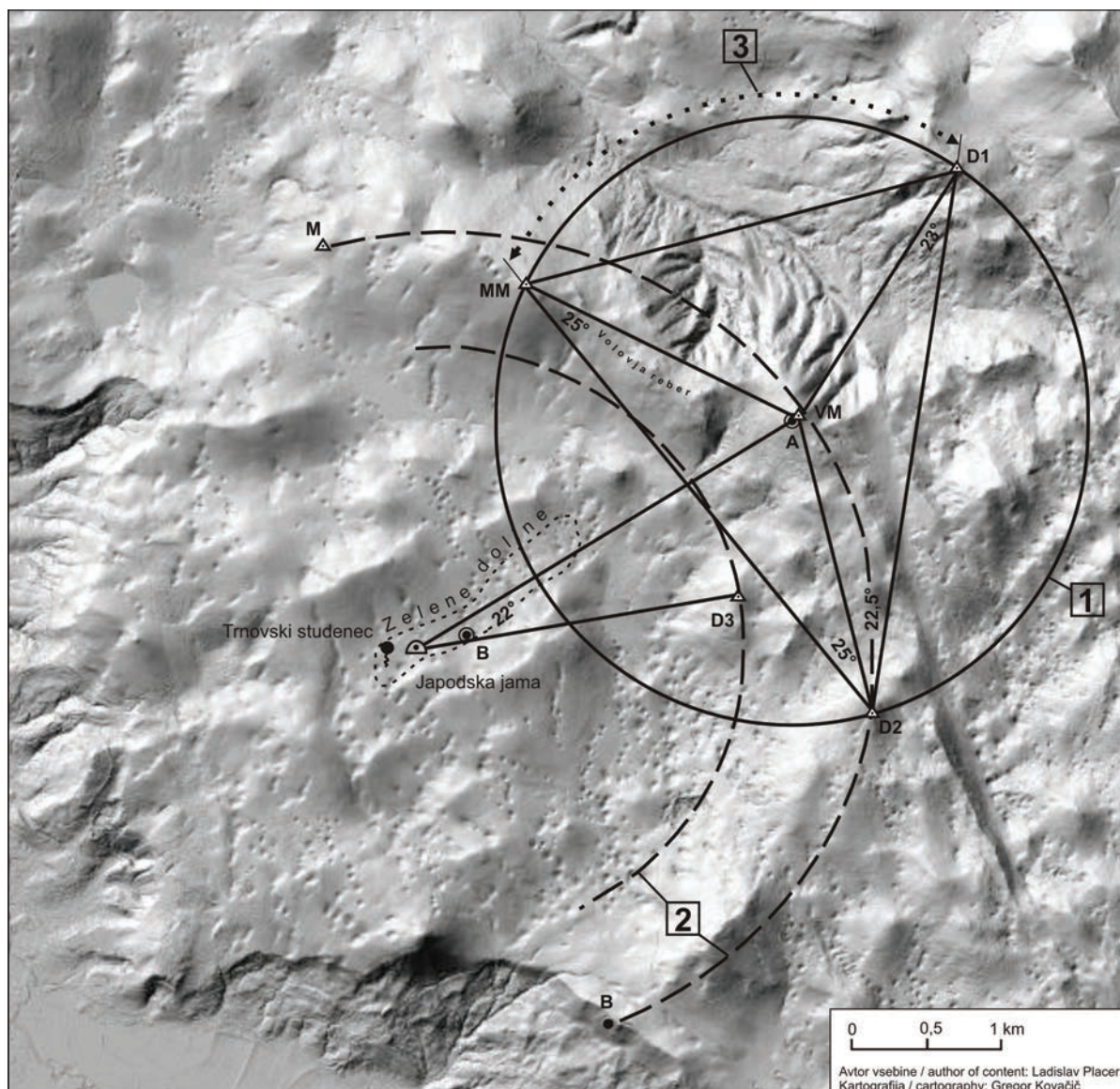


Slika 1: Mitična pokrajina, ki je povezana z geomorfologijo velikega fosilnega rotacijskega plazu. Toponimi mitičnega pomena so uokvirjeni in posvetljeni (topografska podlaga Geopedia, Slovenija) (dopolnjeno po Placer, 2020, sl. 4).
Image 1: Mythical landscape associated with the geomorphology of the large fossil rotational landslide. The toponyms of mythical significance are framed and lightened (topographic base map Geopedia, Slovenia) (adapted from Placer, 2020, Img. 4).

oddaljenosti pa $1967 - 1916 = 51$ m. Odmik mitičnega središča od geometrijskega torej znaša okoli 51 m, kar je približno 2,6 % dolžine srednjega polmera (sl. 2, točka A). Skladnost je torej velika.

Za »Mesečev polkrog« je bilo potrebno geometrijsko središče konstruirati, mitično pa najti v naravi na podlagi obstoječih toponimov in obstoječe naravne in arheološke dediščine. Brez vsebinske utemeljitve ni mogoče določiti geometrijskega središča »Mesečevega polkroga«, v vsakem primeru leži med skrajnima mitičnima objektoma

na polkrožnem slemenu, torej med Milanko in Babo, izbira ostalih vrhov pa je odvisna od tega ali bomo ugotavljali središče prvotnega polkrožnega slemena rotacijskega plazu, ki je nastalo iz odlomnega roba, ali njegovega sedanjega videza, ki vključuje tudi spremembe po nastanku mlajšega sekundarnega plazu. Ta je odnesel del prvotnega slemena med Belimi ovcmi (1011 m) in Župnico (1033 m), tako da Velika Milanja in Devin 2 ne ležita na prvotnem polkrožnem slemenu, temveč v zaledju mlajšega plazu. Konstrukcija središča pred nastankom

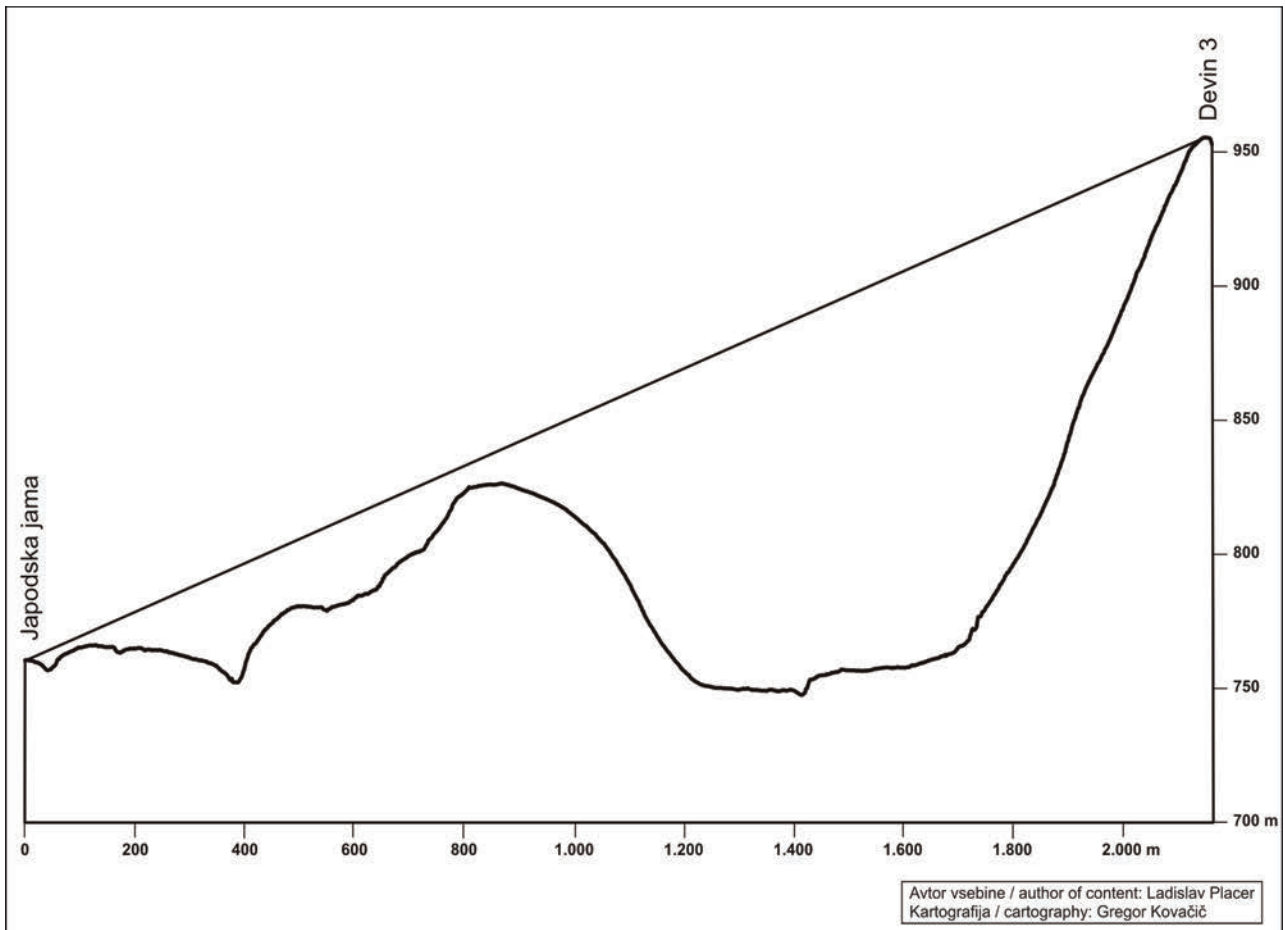


Slika 2: Geometrijske in astronomske prvine mitične pokrajine na območju plazu (digitalna podlaga Atlas okolja, Slovenija) (dopolnjeno po Placer, 2020, sl. 11, sl. 17). Legenda: 1. »Sončev krog«; 2. »Mesečev polkrog«; 3. Simbolna ponazoritev navideznega nihanja Sonca med zimskim in letnim obratom; A – Geometrijsko središče »Sončevega kroga«; B – Geometrijsko središče »Mesečevega polkroga«; VM – Velika Milanja, mitično središče »Sončevega kroga«; MM – Mala Milanja; M – Milanka; B – Baba; D1 – Devin nad Koritnicami; D2 – Devin nad Škriljem; D3 – Devin pod Lunjevico.

Image 2: Geometric and astronomic elements of the mythical landscape in the landslide area (digital base map Atlas okolja, Slovenia) (adapted from Placer, 2020, Img. 11, Img. 17). Legend: 1. »Solar Circle«; 2. »Moon Crescent«; 3. Symbolic representation of the imaginary oscillation of the Sun between the winter and the summer solstice; A – Geometric centre of the »Solar Circle«; B – Geometric centre of the »Moon Crescent«; VM – Velika Milanja, mythical centre of the »Solar Circle«; MM – Mala Milanja; M – Milanka; B – Baba; D1 – Devin above Koritnice; D2 – Devin above Škrilje; D3 – Devin below Lunjevica.

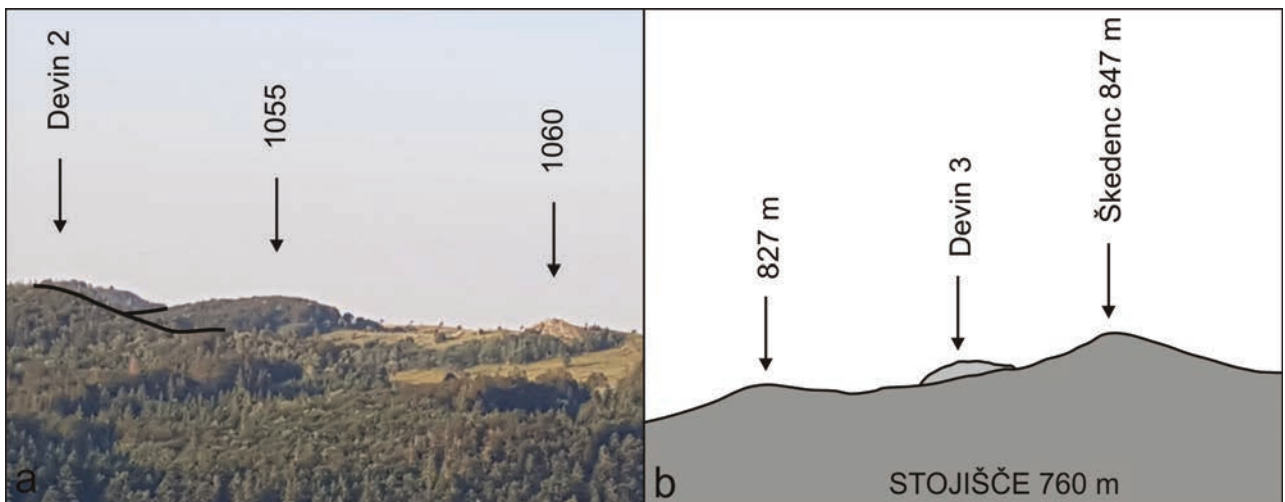
mlajšega plazu je zanimiva le za inženirsko-geološko rekonstrukcijo, obredniki pa so videli sedanjo podobo, zato je pomembno le središče pri sedanjem stanju. K vrhovom polkrožnega slemena je zato potrebno prišteti mitično po-

membna Veliko Milanjo in Devin 2, izločiti pa Bele ovce, ker so radialno zamaknjene nasproti Veliki Milanji. Tej logiki sledi tudi izločitev Male Milanje. Po takem popravku je mogoče vrhove Milanko, Veliko Milanjo, Devin 2 in



Slika 3: Digitalni profil Japodska jama – Devin 3.

Image 3: Digital section of the Japodska jama (Iapydes cave) – Devin 3.



Slika 4: Mitična povezava: a – Pogled z Devina 1 na Devin 2 (po Placer, 2020, sl. 13b); b – Konstruirani pogled iz stojišča nad Japodsko jamo na Devin 3 (slika 3). Danes poraslo.

Image 4: Mythical connection: a – View from Devin 1 to Devin 2 (from Placer, 2020, Img. 13b); b – Reconstructed view from a viewpoint above the Japodska jama (Iapydes cave) towards Devin 3 (Image 3). Now overgrown.



Slika 5: Japodska jama: Stalaktit – falus kot simbol Jarila. Jama je mitično središče, falus pa mikrosredišče »Mesečevega polkroga«. Odbiti del stalaktita je rekonstruiran (Foto: Borut Lozej).

Image 5: lapydes cave: Stalactite – phallus as a symbol of Yaril. The cave is a mythical centre and the phallus the microcentre of the »Moon Crescent«. The missing tip of the stalactite is reconstructed (Photo: Borut Lozej).

Babo, povezati s polkrožnico s polmerom okoli 2768 m. Njeno središče je določeno s šestilom na topografski osnovi, leži pa v srednjemu delu ledine Zelene doline zahodno od Škedenca (847 m) in jugovzhodno od Debelega vrha (843 m) (sl. 2, točka B). Najbližja objekta mitične narave sta Japodska jama in Trnovski studenec, prva leži okoli 380m zahodno od središča polkroga, drugi pa okoli 510 m v približno isti smeri. Glede na bližino in vsebino je mitično središče »Mesečevega polkroga« Japodska jama. Na dolžino polmera 2768m, znaša njen odkim nekaj manj od 13,7 %, procentualno je velik, vendar je določanje geometrijskega središča pri tako veliki možnosti izbire vhodnih podatkov, zgolj orientacijske narave. Obredniki ga verjetno niso natančneje določali, so se pa gotovo ravnali po občutku.

S pomočjo geometrijske konstrukcije središča »Mesečevega polkroga« je mogoče v geometrijo polkroga umestiti tudi Devin 3 in hrbet Volovjo reber med Malo Milanjo in Belimi ovcami. Če zarišemo polkrog skozi Devin 3 dobimo med zunanjim in notranjim polkrogom polkrožni kolobar, ki pokriva skoraj celotno polkrožno sleme in polkrožno pobočje. Če zatem povežemo Veliko Milanjo in Devin 3 z

geometrijskim središčem kolobarja, ugotovimo, da je velikost kota med obema daljicama $22,5^\circ$, če pa zamenjamo geometrijsko središče z mitičnim, torej Japodsko jama, se kot zmanjša na 22° , vendar je še vedno v mejah tolerance obrednega kota. Pri površnem merjenju tega kota znaša njegova velikost malenkost pod 22° , vendar vrh Devina 3 ni izrazit temveč raztegnjen v smeri pravokotno na smer pogleda, tako da pri ciljanju na njegov južni del velikost kota ustreza mejni vrednosti. Poleg obrednega kota daje tej konstrukciji božanski sij tudi pogled s stojišča nad Japodsko jama proti Devinu 3, tu se tako kot pri pogledu z Devina 1 na Devin 2 (Placer, 2020, sl. 13b), vidi le najvišji del vrha Devina 3, premica med obema točkama (sl. 3) namreč poteka okoli 7 m nad manjšim grebenom pri Japodski jami in okoli 17 m nad sedlom med Škedencem (847 m) in neizrazitim vrhom (827 m) nekoliko severneje. Danes je pogled zastrt zaradi poraščenosti Zelenih dolin in Škedenca, če bi bilo površje goličavo, pa bi se vrh Devina 3 videl. Na sl. 4 je prikazana magična podobnost med pogledom z Devina 1 na Devin 2 (sl. 4a) in konstruiranim pogledom s stojišča nad Japodsko jama na Devin 3 (sl. 4b). Vegetacija je seveda odmišljena.

Za vse tri Devine je bilo ugotovljeno, da po geomorfološki plati ustreza le Devin 1, medtem ko ostala dva nimata idealne oblike, to je položnega in nasproti ležečega strmega ali prepadnega pobočja (Placer, 2020). Razlog za to je podan na sliki 4, Devin 2 in Devin 3 sta bila izbrana zato, ker sta zagotavljala kriterija obrednega kota in vidnosti, medtem ko je imela oblika zaradi zoženega izbora manj pomembno vlogo.

H konstrukcijama na sl. 3 in na sl. 4b je potrebno dodati, da sta narejeni na podlagi podatka o legi Japodske jame v Katastru jam. Vendar lega jame tam ni prava, domnevno zaradi varovanja arheološkega spomenika. Pri preizkusu vidnosti s prave lokacije se je pokazalo, da so spremembe zanemarljive, premica med obema točkama poteka okoli 12 m nad površjem manjšega grebena blizu Japodske jame in okoli 15 m nad slemenom Škedenca. Zanemarljiva je tudi sprememba velikosti obrednega kota, ki je še vedno v mejah toleranc.

POSKUS RAZLAGE

O mitični vsebini osrednjega dela »Mesečevega polkroga« priča poleg Japodske jame in Trnovskega studenca, tudi manj vpadljive toda simbolno močne Zelene doline. Japodsko jamo (spodmol) je arheološko raziskala Hrobat Virlogetova (2014b), v njej je opisala petroglife na steni in na nekoliko poškodovanem stalaktitu, za katerega je menila, da je predstavljal falični simbol. Kapnika z enakim simbolnim pomenom sta poznana še iz jame/rupe pri Hujah na Brkinih, tam so mu pravili Devar (Medvešček, 2006) in iz jame/spodmola Triglavca na Divaškem Krasu, kjer so ga imenovali Devač (Placer, 2010). Kje se nahaja brkinska rupa je še vedno skrivnost, toda glede na to, da so Brkini zgrajeni iz flišnih nekarbonatnih kamnin, jo je treba iskati na Matarskem krasu, verjetno v bližnji ali nekoliko bolj oddaljeni okolici Obrova in Hrušice. O tem posredno govori tudi Medveščkov informator, ko pravi, da se jama nahaja daleč v gmajni. Tu je kar nekaj jam, ki v tem smislu niso bile raziskane. V Triglavci je Devač stalaktit s katerega kaplja voda na stalagmit, ki ima obliko vulve z umetno izdobljeno kotanjo. Ta simbolno predstavlja boginjo Devo (Hrobat Virloget, 2014a). Za Huje ne vemo ali je Devarja posebljal stalagmit ali stalaktit. Ker je Devač simbolno oplajal Devo, sklepamo, da je podobno nalogo opravljal tudi Devar. Na to bi kazalo ime in informacija o njegovem pomenu (Medvešček, 2006). V obeh jamah so po ohranjenem izročilu izvajali obrede plodnosti. Ker je stalaktit s katerega kaplja nazorna prisposoba falusa, sklepamo, da se nahaja stalaktit tudi v jami pri Hujah.

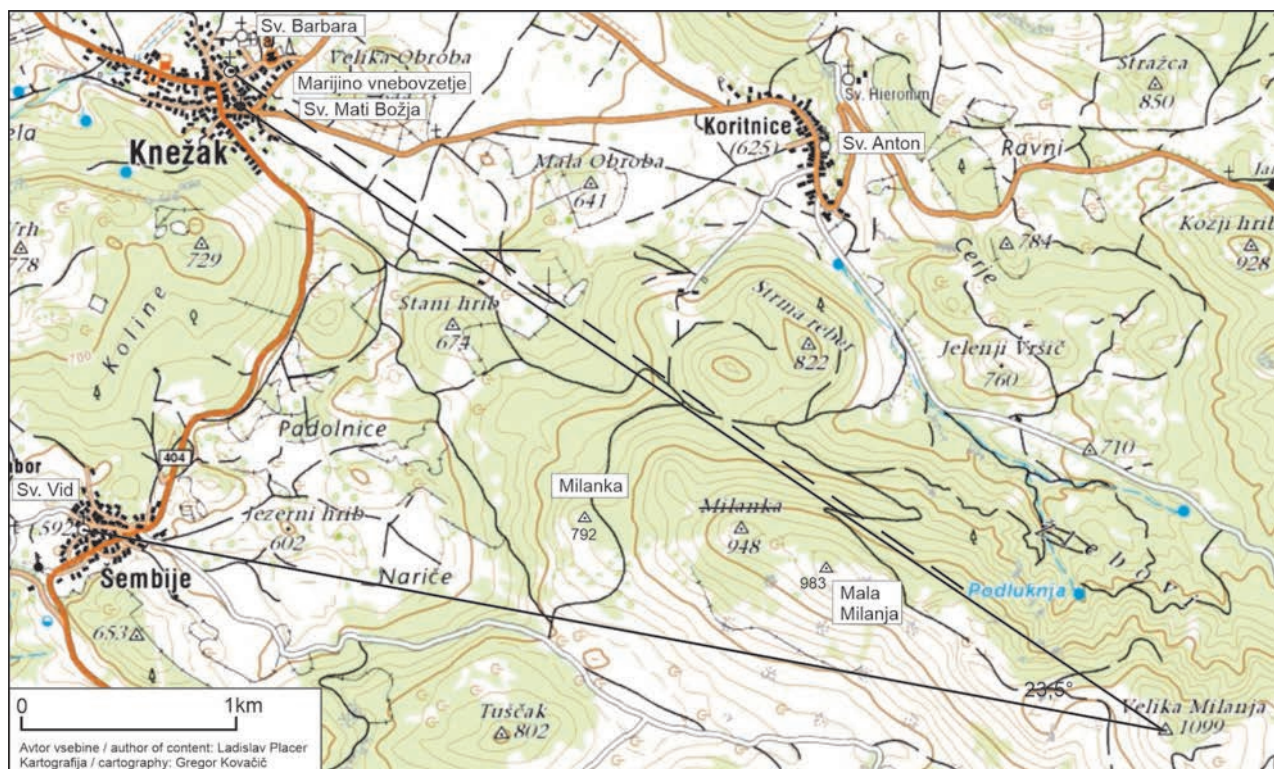
Falični simbol v Japodski jami je tudi stalaktit, v primerjavi s falusom v Triglavci na Divaškem Krasu je sicer manjši, vendar oblikovno dosti bolj podoben moškemu organu (sl. 5). Odbiti del je približno rekonstruiran s črto, ki sledi obliki nepoškodovanega kapnika. Svetost prostora in predmeta poudarja okoliščina, da je stalaktit



Slika 6: Cerkev Sv. Jurija v Ilirski Bistrici (Foto: Ladislav Placer).

Image 6: Church of St George in Ilirska Bistrica (Photo: Ladislav Placer).

edina kapniška tvorba v jami. Kaže, da so tudi tukaj izvajali obrede plodnosti, pri čemer žensko stran predstavlja sama jama, ki simbolizira vulvo, verjetno Mokoši, v prenesenem pomenu morda Matere Zemlje. Za določitev simbolnega nosilca falusa je pomembno, da leži jama na ledini Zelene doline in da stoji v Ilirski Bistrici cerkev Sv. Jurija. Oboje kaže na Jarila (Jaril ali Jarilo), ki ga je krščanstvo pri delu Slovanov prekrilo s Sv. Jurijem. Med ljudmi se je ponekod ohranil v podobi Zelenega Jurija, pri nas predvsem v Beli Krajini. V Ilirski Bistrici je razpadel na Zelene doline in na Sv. Jurija.



Slika 7: Mitična povezava med Sv. Vidom v Šembijah, Veliko Milanjo in kapelo Sv. Matere Božje v Knežaku. Sv. Vid prekriva Svetovida ali Svantevita, Devica Marija v Knežaku prekriva Mokoš. V Knežaku stoji tudi cerkev Marijinega vnebovzetja.
Image 7: Mythical connection between the church of St Vitus in Šembije, Velika Milanja and the chapel of the Holy Mother of God in Knežak. St Vitus replaced either Svetovid or Svantevit, the Virgin Mary in Knežak replaced Mokosh. Knežak also hosts the church of the Assumption of Mary.

V tem primeru gre za Sv. Jurija, mučenca, ki ima po Leksikonu ekumenskih svetnikov (Ökumenisches Heiligenlexikon) veliko število zadolžitev, med drugim zatiranje poganstva. Zaradi atributov obnavljanja življenja je Japodska jama mitično središče »Mesečevega polkroga«, falični simbol pa njegovo mikrosredišče. Zelene doline pokrivajo večji prostor, ta je morda služil za shajališče večjega števila častilcev plodnosti in novega cikla rojevanja. Zelena barva je v splošnem barva novega življenja. Ovsec (1991) omenja kult falusa v zvezi z Jarilom pri Belorusih in lutko s poudarjenim falusom, ki je predstavljala simbolično žrtev za plodnost. Šmitek (2004) omenja Zelenega Jurija v povezavi s kroženjem časa, oziroma letnih časov.

Da je falus v Japodski jami simboliziral Jarila, kaže tudi posredno dejstvo, da v Hujah in Divači, kjer sta »delovala« Devar in Devač, ter bližnjih vaseh ni cerkve posvečene Sv. Juriju (glej Seznam cerkva v Sloveniji). Na Krasu se najbližja nahaja šele v Potočah pri Senožečah, na Brkinih šele v Vatovljah, v Matarskem podolju v Baču pri Materiji.

Glede mitičnih objektov na polkrožnem slemenu bi po izvajanju Pleterskega (2020) lahko sklepali, da so Milanka, Mala in Velika Milanja različni vidiki istega

ženskega božanstva, Mokoši in da »Mesečev polkrog« prikazuje mitične spremembe v letu. Če je ime ledine Nariče primarno povezano z naricanjem, bi bil to lahko prostor žalovanja ob zaključku ali »smrti« produktivnega obdobja letnega cikla, verjetno zime. Iz tistega, kar je bilo povedanega doslej povzemamo, da je predstavljala Velika Milanja čas visokega poletja, saj je skrbela za neprestano vračanje Sonca in s tem poletja, Mala Milanja bi v tem primeru imela vlogo zimskega in letnega obrata, Milanka pa zime, kar ustreza legi Narič. Taka razlaga je mogoča tudi brez ustreznega izvora besede Nariče. V opisanem kroženju letnih sprememb je vloga Babe nejasna, vsekakor pa je predstavljala neprijazno stran Mokoši, kar bi lahko pomenilo, da Milanka in Baba ne predstavljata nasprotja, temveč dve različni pojavnosti neprijetne Mokoši; kot zime, ki se ritmično ponavlja in kot Babe, ki povzroča težave skozi celo leto.

Devin 3 obredno povezuje Japodsko jamo in Veliko Milanjo, morda se je na njem darovalo Jarilu, oplojevalcu in Mokoši, ki jo je oplajal, da je potem prinašala in ohranjala novo življenje.

Podružnično cerkev Sv. Jurija so postavili v Ilirski Bistrici sredi 18. stoletja (sl. 1, sl. 6), o tem kaj je bilo prej na tem mestu ni podatkov, vendar se je dalo iz slabo



Slika 8: Pogled z Devina 1 na Snežnik (Foto: Ladislav Placer).
Image 8: View from Devin 1 to Mt Snežnik (Photo: Ladislav Placer).



Slika 9: Pogled z Devina 2 na Snežnik (Foto: Ladislav Placer).
Image 9: View from Devin 2 to Mt Snežnik (Photo: Ladislav Placer).

zabrisanih sledi sestaviti zgodbo o Jarilu, ki se je, kot rečeno, ohranil v dveh krščanskih preobrazbah, prisilni v Sv. Juriju in ljudski v Zelenem Juriju. V Ilirski Bistrici je ljudska preobrazba skrivnostno poniknila v Zelenih dolinah, skupaj z njegovim faličnim simbolom, Sv. Jurij pa živi naprej.

Mučenec Sv. Jurij, latinsko St. Georgius (r. 275/280, u. 303/305), ima v Sloveniji 75 cerkva (glej God Sv.

Jurija, mučenca) in ni pretirano reči, da je bilo veliko teh postavljenih na mestih ali blizu mest čaščenja Jarila. Dve sta bili že omenjeni, za obdelano območje pa je posebej zanimiva »izpostava« Sv. Jurij na Jurščah pri Pivki, kjer nosita Jurjevo ime cerkev in vas. Naslednja je v Žejah. Starejše cerkve, ki so bile posvečene temu svetniku pred prihodom Slovanov, so bile postavljene iz podobnih vzgibov, le da je Sv. Jurij drugod nadomeščal druge »demone«.



Slika 10: Cerkev Marijinega vnebovzetja v Knežaku (Foto: Ladislav Placer).

Image 10: The church of the Assumption of Mary in Knežak (Photo: Ladislav Placer).



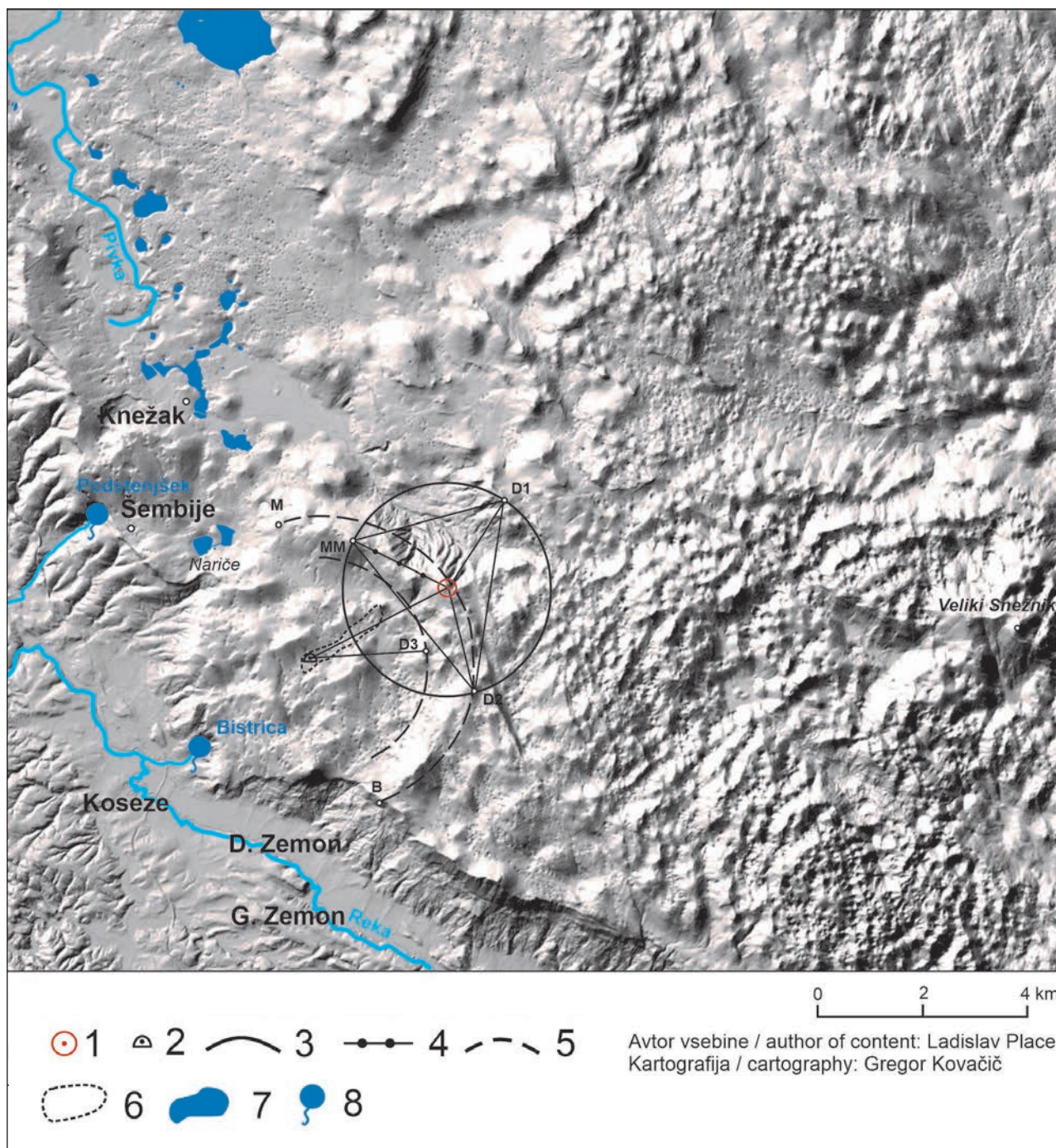
Slika 11: Kapelica Sv. Matere Božje v Knežaku (Foto: Ladislav Placer).

Image 11: The chapel of the Holy Mother of God in Knežak (Photo: Ladislav Placer).

Sem sodi tudi slovensko obalno območje, ki ga zgodnja slovanska poselitev ni dosegla. Tu stoji znamenita cerkev Sv. Jurija (*ita. S. Giorgio*) v Piranu, zavetnika mesta in mnogih drugih mest po krščanskem svetu. Po arheoloških podatkih je bila predhodnica te cerkve postavljena med 6. in 7. stoletjem, vendar ni znano kateremu svetniku je bila posvečena (glej Cerkev Sv. Jurija, Piran). Vsekakor obstaja možnost, da se je Sv. Jurij v Piran naselil prej, preden se je Jaril pojavil za Kraškimi robom.

O pomenu Jarila in Mokoši v bližini Knežaka, ki je bil središče zgodnje srednjeveške slovanske kneževine, ne gre izgubljati besed, brez dvoma gre za izstopajoč kulturni in zgodovinski spomenik slovanske dediščine v tem delu Slovenije, ki je zrasel iz substrata starejših kultur in neobičajne polkrožne geomorfološke oblike. Slovani so ga preoblikovali po svoji predstavi. Oba mitična lika sta kneževini zagotavljala osnovne pogoje preživetja; plodnost in neskončno kroženje časa, zdravo živino, obilo vode, stalno navzočnost Sonca in s tem varnost. V prvem

članku (Placer, 2020) je bilo rečeno, da so bila osrednja upravna naselja kneževine, Knežak, Šembije, Dolnji in Gornji Zemon ter pogojno Koseze, sicer razporejena na segmentu krožnice, ki je imela središče na Veliki Milanji (Mokoši), vendar je bila taka razporeditev slučajna in pogojena z geomorfološko logiko. Po temeljitem razmisleku pa izgleda, da sta imela Šembije in Knežak nad dolino Reke vendarle posebno mesto, iz Velike Milanje je namreč mogoče videti obe naselji, drugih se ne vidi. Smernici proti cerkvi Sv. Vida v Šembijah in kapelici Sv. Matere Božje na pomembnem vaškem križišču v Knežaku oklepata srednjo vrednost obrednega kota okoli 23,5° (sl. 7). Večkratne meritve na kartah Atlasa Slovenije (Geopedia) in Atlasa okolja (Agencija RS za okolje), dajejo vrednosti med 23,4° in 23,5°. Natančna neposredna izmera ni mogoča, ker so napoti drevesa na Veliki Milanji in stavba v Knežaku. Ponovno presenečata profila Velika Milanja – Sv. Vid in Velika Milanja – kapelica Sv. Matere Božje, saj sta oba objekta tik nad vmesnimi grebeni. Kot



Slika 12: Ideogram Mokoši in Jarila (dopolnjeno po Placer, 2020, sl. 18). Legenda: 1. Velika Milanja (Mokoš), mitično središče »Sončevega kroga«; 2. Japodska jama s faličnim simbolom, mitično središče »Mesečevega polkroga«; 3. »Sončev krog«; 4. Volovja reber; 5. »Mesečev polkrog«; 6. Zelene doline; 7. Presihajoče jezero; 8. Kraški izvir; M – Milanka; MM – Mala Milanja; B – Baba; D1 – Devin nad Koritnicami; D2 – Devin nad Škriljem; D3 – Devin pod Lunjevico.

Image 12: Ideogram of Mokosh and Yaril (adapted from Placer, 2020, Img. 18). Legend: 1. Velika Milanja (Mokosh), mythical centre of the »Solar Circle«; 2. Iapydes cave with the phallic symbol, the mythical centre of the »Moon Crescent«; 3. »Solar Circle«; 4. Volovja reber; 5. »Moon Crescent«; 6. Zelene doline (Green valleys); 7. Intermittent lake; 8. Karst spring; M – Milanka; MM – Mala Milanja; B – Baba; D1 – Devin above Koritnice; D2 – Devin above Škrilj; D3 – Devin below Lunjevica.

smernice proti cerkvi Marijinega vnebovzvetja v Knežaku znaša okoli 24,8°. Izgleda, da je imel prostor okoli križišča v Knežaku večji kulturni pomen od tistega, na katerem stoji cerkev, od tod se je namreč odcepila pot proti Koritnicam pod Devinom 1. Vprašanje pomena bi lahko rešila arheološka izkopavanja.

Z vrha Devina 1 (sl. 8) in Devina 2 (sl. 9) je magični pogled na Snežnik, zato je verjetno imel v mitski pokrajini pomembno mesto, vendar ga v tem trenutku še ni mogoče ovrednotiti. V obeh primerih se nudi podoben pogled kot z Devina 1 na Devin 2 in s površja nad Japodsko jamo na Devin 3 (sl. 4). Med Veliko Milanjo in Snežnikom ležita še Suhi vrh (1171m) in Konj (1170m), ki ju je tudi potrebno smiselno vključiti v mitično pokrajino.

SKLEP

Kaj je ostalo do danes od Mokoši in Jarila? Mokoš se je v času pokristjanjevanja skrila pod Milanjo in Milanko, njena morebitna svetišča ali drugačna obeležja, pa je bolj ali manj nasilno prevzelo novo žensko »božanstvo«, Sv. Marija. V naseljih okoli velikega ideograma je kar nekaj cerkva posvečenih materi božji, npr. v Knežaku, Jablanici, Podgrajah, Zabičah, Drskovčah, Ratečevem Brdu, Jelšanah, Obrovu in Rjavčah (glej Seznam cerkva v Sloveniji in Župnije v škofiji Koper), vendar katera od teh ali njihovih predhodnic, je bila resnično postavljena na mestu poganskih svetišč posvečenih Mokoši, je težko reči. Izgleda, da stoji cerkev Marijinega vnebovzvetja v Knežaku (sl. 10) na drugotnem mestu in da je lokacija kapelice Sv. Matere Božje (sl. 11) pomembnejša, zelo povedno pa je, da sta oba krščanska objekta v Knežaku, ki je bil središče Mokošine duhovne in upravne moči posvečena Sv. Mariji. O tradiciji ženskega božanstva v Knežaku morda govori tudi podatek, da v treh bližnjih vaseh, Šembijah, Koritnicah in Zagorju, ni cerkve posvečene Mariji.

Epiteti kot so Marija Karmelska, M. Snežna, M. Žalostna, M. Pomočnica ali pridatki, ki označujejo pomembne dogodke iz Marijinega pred in posmrtnega življenja kot Marijino oznanjenje in M. vnebovzetje, so poznejšega datuma. Nastali so z razvojem njenega čaščenja.

Mokoši smo glede na njeno preimenovanje v Milanjo in Milanko dodali pridevek »mila« v prvotnem pomenu »usmiljena«, torej usmiljena boginja Mokoš (Placer, 2020). Tak pridevek pa ni daleč od milostne in usmiljene Device Marije, zaradi česar prenos čaščenja od boginje na mater božjo formalno ni bil velik, usodnejša in težja je bila vsebinska sprememba. Poganski običaji še danes ponekod trdovratno vztrajajo.

Tudi Jaril je spremenil svojo podobo in dejavnost, uradno se je preobrazil v Sv. Jurija, v Beli krajini in na Hrvaškem pa se je med ljudmi ohranil kot Zeleni Jurij. V Ilirski Bistrici živi njegova uradna preobrazba, od Zelenege Jurija pa so ostale le Zelene doline.

Na sl. 12 je ideogram Mokoši in Jarila (sl. 2) postavljen v prostor, ki je obravnavan v tem članku in je bil središče upravne in duhovne oblasti slovanske zgodnjerednjeveške kneževine v zaledju Istre.

K sklepni misli gre ugotovitev, da prinašata prejšnji (Placer, 2020) in sedanji članek o Veliki Milanji v ta prostor novosti, ki še niso preverjene s primerjalnimi študijami. V vsakem primeru pa imamo pred seboj žensko božanstvo, ki ga prekriva Devica Marija in moško božanstvo, ki ga prekriva Sv. Jurij. Glede na ledinska imena in značilnosti krajine sta jima najbližje Mokoš in Jaril. Oba sta zasedla mesti božanstev predsovanskega obdobja.

Imena naselij Knežak, Šembije, Koseze ter Dolnji in Gornji Zemon, izvirajo iz slovanske upravne in vojaške terminologije, vsako posebej ne vzbujajo posebne pozornosti, vsa skupaj na razmeroma majhnem prostoru pa kažejo na veliko verjetnost, da je tu obstajalo središče zgodnjerednjeveške slovanske upravne in vojaške oblasti. Tak sklep dodatno podpira tudi bližnji obredni poligon (sl. 12) in poligonska povezava Velike Milanje, torej Mokoši, s Šembijami in Knežakom (sl. 7). Opisana koncentracija objektov upravne, vojaške in religiozne vsebine, sicer nima moči znanstvenega dokaza, ima pa moč upoštevanja vredne teorije.

Idejo o upravnem in duhovnem središču kneževine posredno podpira tudi ostanek obrambnega ali izvidniškega sistema med dolino Reke in Matarskim podoljem, ki poteka prečno na Brkine. Iz doline Reke pri Ribnici je mogoče po krajšem prečnem grebenu Ostrožno brdo priti v kraj Ostrožno brdo, nato po grebenski cesti na Pregarje na glavnem grebenu Brkinov. Od tu naprej ponovno vodi prečna grebenska pot v Obrov v Matarskem podolju. Ostrožno brdo in Obrov izhajata iz slovanske obrambne terminologije. Vmes so Pregarje, katerih ime doslej etimološko še ni bilo zadovoljivo razloženo. Menim, da ime vasi verjetno izhaja iz praslovanske besede *pretŭ*, sed. *prego* in *pregno* v pomenu napeti, zvezati (Snoj, 1997, 486), ki danes ni več samostojna, ohranila pa se je v povezavah sprega, vprega. Pregarje bi torej bile kraj, ki stoji na glavnem grebenu Brkinov in povezuje dve prečni poti, morda pa tudi dva dela obrambnega ali izvidniškega sistema. Tako razlago imena potrjuje tudi naselje Pregara v Istri, ki stoji na sedlu med izviroma dveh potokov in njunih dolin ter povezuje kraje ob slemenski cesti prečno na tamkajšnje doline vse od Pavličev pri Trebešah do Baredine nad dolino Bračane na Hrvaškem. Seveda bi Obrov in Ostrožno brdo lahko le nadzorovala prehod po dolini Reke in Matarskem podolju.

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CULTURAL AND HISTORICAL SIGNIFICANCE OF THE MILANJA (SLOVENIA) – PART TWO: ST GEORGE IN THE TOWN OF ILIRSKA BISTRICA AND ST MARY IN THE VILLAGE OF KNEŽAK

Ladislav PLACER

Pod akacijami 13, 1000 Ljubljana, Slovenia

e-mail: ladislav.placer@telemach.net

SUMMARY

The contribution published in one of the previous volumes of this series discussed the Slavic mythical landscape above the town of Ilirska Bistrica, in the hinterland of the Istrian Peninsula (Placer, 2020). The spatial distribution of mythical places reveals that this landscape formed as the consequence of an exceptional geomorphology provided by a large fossil rotational landslide that left behind a semicircular ridge and a semicircular slope (Img. 1, Img. 2). Members of nature cults symbolically likened the semicircular ridge to the crescent moon. The ridge bears peaks with mythical toponyms such as Milanka, Mala Milanja, Velika Milanja and Devin 2, the ridge of Volovja reber (Ox slope) and the pyramidal rocky peak of Baba. In addition to Devin 2, there are two other peaks of the same name, i.e. Devin 3 on the semicircular slope and Devin 1 outside the landslide area. Devin is a geographical name for an elevation of a certain shape that was the ritual place of nature cults. The concentration of three peaks with the name Devin is unique in the known mythical landscapes of the Slavs. The mythical places discussed in the first article are now joined by three others: Trnovski studenec (Trnovo spring), Japodska jama (lapydes cave) and Zelene doline (Green valleys). All are located in the middle of the displaced mass of the landslide. The places of the mythical landscape join into an ideogram composed of two geometric bodies with the working names of »Solar Circle« and »Moon Crescent« (Img. 2). The mythical centre of the »Solar Circle« is Velika Milanja or the compassionate goddess Mokosh. Its location within the ideogram suggests the goddess watched over the (imaginary) oscillation of the Sun between the summer and the winter solstice. This task is new and unusual for Mokosh. The mythical centre of the »Moon Crescent« is the lapydes cave, which holds a phallic stalactite (Img. 5) as a symbol of the god Yaril. The cave itself symbolises the vulva, probably that of Mokosh or possibly Mother Earth. Yaril was associated with the changing of the seasons, fertility and renewal of life. Mokosh is ambivalent, which is geometrically expressed in its location both in the centre of the »Solar Circle« and on the »Moon Crescent«. The Catholic Church replaced the compassionate goddess Mokosh with the compassionate Virgin Mary. Whereas the memory of Mokosh has been lost, the toponyms of Milanja and Milanka survive, together with a church of the Assumption of Mary (Img. 10) and a chapel of the Holy Mother of God (Img. 11) located in the centre of the Slavic administrative and religious centre at Knežak. Better preserved is the memory of Yaril, who as Zeleni Jurij (Green George) still marks the advent of spring in some parts of Slovenia, while in Ilirska Bistrica he is present in the toponym of Zelene doline (Green valleys), with the lapydes cave in the centre, and the church of St George located in the town (Img. 1, Img. 6). Image 12 shows the ideogram of Mokosh and Yaril (Img. 2) set in the wider area that formed the administrative and religious centre of the early medieval Slavic principality. The prince's seat was in Knežak (prince = sl. knez → Knežak).

Keywords: Slavic mythical landscape, goddess Mokosh and god Yaril, centre of early medieval Slavic administrative and religious authority, Knežak, Ilirska Bistrica, Istrian hinterland

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ASSESSING THE QUALITY AND SOCIAL IMPACT OF CREATIVE PLACEMAKING PRACTICES

Chrysi RAPANTA

Nova University of Lisbon, School of Social Sciences and Humanities, Av. de Berna, 26-C, 1069-061, Lisbon, Portugal
e-mail: chrysi.rapanta@fcs.unl.pt

Leandro MADRAZO

Ramon Llull University, School of Architecture La Salle, Sant Joan de La Salle, 42, 08022, Barcelona, Spain
e-mail: leandro.madrazo@salle.url.edu

Maria Irene APARICIO, Nuno FONSECA & Rosalice PINTO

Nova University of Lisboa, School of Social Sciences and Humanities, Av. de Berna, 26-C, 1069-061 Lisbon, Portugal
e-mail: maparicio@fcs.unl.pt; nmfonseca@fcs.unl.pt; rosalice.pinto@fcs.unl.pt

Špela VEROVŠEK

University of Ljubljana, Faculty of Architecture, Zoisova 12, 1000 Ljubljana, Slovenia
e-mail: spela.verovsek@fa.uni-lj.si

ABSTRACT

Placemaking and creative placemaking aim at transforming public spaces by fostering new bonds between people and places. The multiple actors involved in a creative placemaking practice – artists, residents, social scientists, politicians, investors, etc.– need to agree on the objectives as well as in the way to achieve them and evaluate them. However, the design, implementation and evaluation of creative placemaking are three inseparable actions of a single process: the construction of a sense of place. Thus, agreeing upon the objectives of a placemaking action, and the ways to assess to which extent the pursued goals have been achieved poses a range of difficulties: which goals are most relevant and why, which placemaking practices are most appropriate to achieve which goals, and which are the evaluation criteria and tools to assess the performed activities, these are issues that cannot be easily disentangle from each other. In the A-Place project, we have developed an assessment framework to identify the generic traits involved throughout the overall process of a creative placemaking practice, as well as the criteria to assess its specific quality and social impact.

Keywords: creative placemaking, community-based art practice, place attachment, placemaking assessment

VALUTARE LA QUALITÀ E L'IMPATTO SOCIALE DELLE PRATICHE DI "PLACEMAKING" CREATIVO

SINTESI

Il "placemaking" e il "placemaking" creativo includono una serie di connotazioni che si intersecano nel processo di creazione di luoghi vivibili per le persone – dalle pratiche architettoniche e di design, alle attività basate sull'arte e al design collaborativo, al valore intrinseco dei luoghi pubblici, alle loro trasformazioni creative e al significato per le persone. Qualsiasi valutazione della qualità delle pratiche del placemaking creativo è complessa e impegnativa. Questo documento sviluppa una panoramica descrittiva e una discussione mirata intorno alle delimitazioni necessarie dei significati e delle definizioni che il "placemaking creativo" ha per determinate comunità, quando si valutano le azioni pianificate o realizzate. Lo facciamo affrontando due termini chiave: la valutazione dei valori promossi durante il processo di placemaking e il loro impatto in un dato ambiente socio-fisico. Entrambi, i valori approvati e l'impronta stabilita, riflettono l'estensione e la qualità dell'approccio creativo alla pianificazione dei luoghi ("placemaking" creativo) e sono quindi un punto di partenza personalizzato per la valutazione.

Parole chiave: "placemaking" creativo, pratica artistica basata sulla comunità, attaccamento al luogo, valutazione del "placemaking"

INTRODUCTION

Placemaking is a way of thinking about cities and communities, aimed at redefining urban spaces by creating places for everyday public life (Jacobs, 1961; Gehl, 1987; Whyte, 1980). Through placemaking, public space can be re-designed and re-shaped to address the needs of living communities, activating the potential embedded in the social fabric through a process of community empowerment. Placemaking is about designing cities for people, it is a collaborative process to reinvent and reimagine everyday urban spaces (Project for Public Spaces, 2007) working on social and cultural identities and values.

Placemaking is about transforming spaces into places by changing their aesthetic, physical and social identities (Kelkar & Spinelli, 2016). Therefore, a key issue is to assess to which extent these goals are achieved. Assessing the extent to which the placemaking implementations in particular local environment contribute to the transformation of the physical and social fabric is a fundamental component of any placemaking process. It brings necessary transparency in the process and helps to identify efficient and beneficial practices.

Creative placemaking focuses on the involvement of arts and culture in this transformation of spaces into places. It has been defined as *“an evolving field of practice that intentionally leverages the power of the arts, culture and creativity to serve a community’s interest while driving a broader agenda for change, growth and transformation in a way that also builds character and quality of place”* (Artscape, 2021). The term is used to refer to artist practices which before were named as “art and social engagement,” “art and social practice,” “community arts,” “participatory arts,” and “community cultural development” (Meagher, 2019, citing Goldbard, 2006). As Stern (2014) states, it is necessary to clarify the conceptual foundations of the term “creative placemaking” before proposing any method to assess it. From an artistic/architectural and academic point of view, the challenge is to define the role of art and culture in transforming people’s sense of connection to a place over time and to value the ability of artists to *“reframe public discourse, challenge the status quo, spark imagination, and build empathy through their work”* (Eisenbach, 2014, 98). From a policy-making point of view, the difficulty is to prove the power of arts and culture as social and economic catalysts based on evidence of what works in a specific context (Markusen & Gadwa, 2010).

In this article, we present the theoretical grounds of our on-going endeavours to evolve assessment methodologies aimed at creative placemaking evaluation. First, we enlighten the notion of creative placemaking, its relation to public space, arts and

community. In addition, we delve into the question of place, as a sociocultural construct and reflect on the assessments of creative placemaking throughout the two key categories – the quality evaluation of the placemaking process and the social impact assessments.

CREATIVE PLACEMAKING: PUBLIC SPACE, ARTS, AND COMMUNITY

The term *creative placemaking* arose as a result of a programme of the National Endowment for the Arts in the United States, whose goal was *“to integrate art and design in community planning and development, build shared spaces for arts engagement and creative expression, and increase local economic activity through arts and cultural activities”* (Landesman, 2013, vii). The aim was to help public, private, non-profit, and community sectors to develop strategies to shape the physical and social character of a neighbourhood, town, city, or region around arts and cultural activities (Markusen & Gadwa, 2010).

The addition of the adjective *creative* to the making of places has been explained in various ways. For the advocates of the creative economy, creative placemaking can help cities to compete in the global economy by making them more attractive to investors (Florida, 2002). From a policy-making perspective, it has been argued that creative placemaking is driven by the interest of government authorities and other institutions to promote arts and culture (Courage & McKeown, 2019). For Meagher (2019, 170), *“creative placemaking is not a completely new practice but rather a novel way to bring together and name a diverse set of creative activities that link to urban planning and/or community development”*. From the arts-based perspective of creative placemaking, it has been stated that artists must *“speak the language of community development so they can connect and be effective in supporting their communities”* (Zitcer, 2020, 8). However, a distinction between art-makers and community stakeholders is hard to established in creative placemaking. Rather, in these practices art-makers and local community stakeholders are inextricably intertwined. However, the placemaking activities planned in A-Place are not born in the communities, but are the result of a creative process that might engage multiple stakeholders, including architects, artists and academics, social scientists and community representatives, citizens, local administrations and cultural institutions.

Creative placemaking practices might be community-driven but not community-led. By the same token, they can be arts-based but not arts-led. A continuous balance between artistic practices engaging the community and community practices embracing arts as part of their everyday lives is an essential

part of the placemaking process. In this process, it is necessary to establish the meanings of *public art*, *meaningful art*, *place* and *community* and to identify the links between the terms.

Public art is not simply art made (in) public

Public art is not simply art made (in) public. Public art and public space are strongly related with each other. On the one hand, *“Public space should not be considered ‘public’ because of the space itself, but rather because of the activity that takes place in it”* (Lombardo, 2014, 20). In creative placemaking, this activity is arts-based with art not being limited to the methods used for creating artistic works (e.g. painting art, video making art, etc) – which would be an instrumentalist perspective of art- but including any kind of *“symbolic presentations of rational ideas (such as love, death, envy) through sensible intuitions”* (Crawford, 2015, 54). On the other hand, public art, in order to be considered as such, needs to be meaningfully related to the space in which it is situated (Zebracki, 2012).

Public art is meaningful

How art is meaningfully related to the space in which it is situated? To reply to this question, the process of construction of meaning needs to be considered. Meaning itself does not exist, as meanings are constructed by specific people in specific contexts under specific circumstances. This meaning construction process by means of public art gives it with a pedagogical character: if it leads people to create meanings, then it helps them learn or improve their learning about phenomena. This simple presupposition shifts the focus *“from the artists and the artworks per se toward the way audiences engage with art”* (Schuermans et al., 2012, 677). As audiences engage with meaningful public art, they learnt about themselves and about their relation with public space. Thus, public art is meaningful when it promotes such learning or meaning construction processes, particularly when it creates transitional spaces in which individuals are *“challenged to face the ambivalences that result from encounters with diversity”* (Schuermans et al., 2012, 678).

Meaningful public art creates a place

As Schneekloth and Shibley (2000, 1) *“Placemaking is the way all of us as human beings transform the places in which we find ourselves into places in which we live.”* Places are spaces with meanings, i.e. ones *“that you can remember, that you can care about and make part of your life. The world should*

be filled with places so vivid and distinct that they can carry significance. Places could bring emotions, recollections, people, and even ideas to mind” (Lyndon, 1983, 2). In contrast, Augé (1995, 77) describes a non-place as *“a space which cannot be defined as relational, or historical, or concerned with identity”*. Public art can create *“an authentic and meaningful sense of place, and a sense of ownership of and belonging”* (McKeown & Courage, 2019, 202), senses which are at the heart of creative placemaking. Therefore, reinstating and reinforcing the links between people and places would be a key objective of placemaking.

Place creates community

In the same way that places become meaningful through the meanings that people ascribe to them (individually, collectively, and over time), the life of people becomes meaningful, intelligible through their experience with places. Moreover, when such experience becomes a socially shared practice, communities of practice emerge. As Wenger (2011, 2) argued: *“Nurses who meet regularly for lunch in a hospital cafeteria may not realize that their lunch discussions are one of their main sources of knowledge about how to care for patients. Still, in the course of all these conversations, they have developed a set of stories and cases that have become a shared repertoire for their practice”*. For such communities of practice to emerge, a place is necessary as a common frame of reference. In Wenger’s example, the place is the hospital. In creative placemaking, the place can be the revived central square of a village in which people of all ages and backgrounds regularly meet, interact and live together. In this case, the central square has also a symbolic meaning, as it is the heart of the village. Therefore, any authentic interaction taking place in the square may be viewed as a shared practice contributing to the informal deliberation ritual of the villagers around any issue that affects them. Arts and culture have a major role in the creation of such communities, as they offer a common frame of meaning making accessible to everyone to perceive. Under this perspective, arts can emerge as a medium of inclusive placemaking (Lennon, 2020).

ASSESSING CREATIVE PLACEMAKING

Place, unlike space, is a sociocultural construction, and as such, it cannot be viewed as a process leading to a product-artefact. Therefore, the evaluation of the process of creating places with art-based practices embedded in communities conveys an assessment of:

- a) The process of creating art, meaning, place and community, which we refer to as *quality evaluation*;
- b) The social impact of the placemaking practices, which we name *social impact assessment*.

Quality evaluation

In creative placemaking practices, quality might refer to: (a) a creative participatory planning (Cilliers & Timmermans, 2014); (b) a social production of heritage, both visible and invisible, that promotes and sustains a community's engagement with both the tangible and intangible cultural assets (Giaccardi & Palen, 2008); and (c) a building of social capital (Kelkar & Spinelli, 2016) and communities (Lepofsky & Fraser, 2003) which results of participation and engagement.

The key questions to evaluate the quality of processes involving creative participation, social engagement, and community building are: (a) which of the values implicit in these processes reveal a certain level of quality, and (b) which indicators to use to measure them. To define those values, we first need to define what a value is and then which values are relevant in a placemaking process.

Value

The term value is extremely polysemous and its meaning varies according to the domain in which it is used: economy, rhetoric, sociology, among many other. In economics, as pointed out by (Meyer, 2008), value refers to the *exchange value*, which enable us to evaluate, or to measure quantitatively the price of one object in relation to another. This meaning follows a utilitarian logic. In rhetoric, values constitute objects of agreement or premises to create or reinforce the communion with an audience, in order to obtain its adhesion (Perelman, 1997). Thus, the fact that a value is acceptable and preferable may be more important than the fact that it is true. In his latest work, Perelman (1997) further points out that value and hierarchy are inseparable notions. In fact, value implies breaking the equality between things, in all situations in which one must be placed before or after the other.

Sociologically, as Heinich (2020) points out, value is the result of a set of operations through which a given quality is assigned to an object, with various degrees of consensuality and stability. Evidently, these operations depend both on the nature of the evaluated object, as well as on the nature of the subjects who evaluate it, and the nature of the evaluation. In this way, it can be said that the value is neither objective, subjective, nor arbitrary. In fact, the value itself is motivated by the way the

object is evaluated, by the collective representations that individuals have about the object and by the varied possibilities of representation that the different contexts offer. In fact, the value might not be in the object itself, rather in a system of shared representations, contextually applied to an object. However, this relativity does not preclude the existence of a complete break with established principles and practices, traditions, routines and norms. In reality, there is an effective interaction between objects, humans and contexts.

Creative participation values

Defining creative participation is a question of values shared by the placemakers within a community. Promoting creative participation is a challenging task that must take into account different factors such as the availability of materials, the script of participation and the ability to adapt methods and tools to the given circumstances.

According to Cilliers and Timmermans (2014, 420), "*the difference between participation and successful participation lies in the process, how it is conducted, and how it is approached. Evaluation should form a core part of the participation process, in order to determine if the chosen method and approach were successful, if social capital was built during the process, and if the end project benefited from the participatory planning process*". To assess the quality of social participation, we need to monitor the process of how the participation and representation of different social groups in placemaking activities was pursued and to what extent it was achieved.

When placemakers ask community members to "*be creative*" during a workshop, for example, the first thing that must be assured is the access of participants to the materials they need. For example, an exploration of participants' cartographic representations of a space would require to use a variety of techniques such as diagrams, drawings, photographs, videos, audio-recorded narrations, and even role playing in theatre, song and dance (Sanderson et al., 2020). Also, it seems important to give appropriate guidelines to the participants, so that they can reach the maximum potential of their creativity. For placemakers to prepare a participatory activity, and its guidelines thereof, the existing creative possibilities of communities must be first investigated, to limit the possibility of surprises (both positive and negative) when the activity pretends 'a' and the participants are able or willing to do 'b'. It is not uncommon that, without an adequate preparation, participation becomes tyrannical rather than transformative (Martin & Hall-Arber, 2020). Certainly, such training can never be complete, and goals and tasks must be continuously

adapted in light of the participants' involvement (Alexander et al., 2007). This last consideration relates to the value of inclusiveness, which is also very important in social participation.

Value of inclusiveness

Making a placemaking process inclusive is not merely a goal for strategic planning and decision-making; it is also and mainly a value issue promoted through authentic face-to-face interactions. Inclusiveness also means to show an equal treatment and openness towards people from diverse cultural backgrounds (with culture not being limited to ethnicity but also to personal characteristics, for example, age, language, gender, etc.). As Daša Spasojevic and Ana Souto Galvan (2017) observe, placemaking and meaningful (authentic) interactions are directly interlinked, *"as place becomes an opportunity for cross-cultural learning, individual agency, collective action, negotiation of personal points of view and different ways of doing things"*. This means that participants in placemaking processes and activities need to be given opportunities for authentic interaction and participation. If their participation is symbolic or factual –that is, it is reduced to write a number indicating how many people from different ethnical backgrounds participated in an activity– then there is the danger of biased objectification of participation process (Martin & Hall-Arber, 2020). A requirement for authenticity in participation is that the issues are actually addressed, and that "real" issues are dealt with, i.e. issues that are relevant and genuinely meaningful to community participants.

Social engagement values

Social engagement, when it refers to placemaking, generally includes two processes: (a) the engagement of different types of stakeholders, in the definition and implementation of placemaking goals; and (b) the stimulation of individuals' place meaning, i.e. the symbolic meanings ascribed to a place and place attachment, and the bonds between people and places values (Kudryavtsev et al., 2012)

To this end, social engagement is understood throughout place attachment and place meaning. Spasojevic and Souto Galvan (2017) contend that people's bonds with places have a great impact on their engagement with their living environments. As Manzo and Perkins (2006, 339) argue, *"Those who are more attached to their neighbourhoods are more likely to invest their time and money into the neighbourhood"*. To create this place attachment, people need to interact with the place, and with

each other within the (permanently under construction) limits of the place. Place meaning comes afterwards: through interactions with places, people can attribute new meanings to the place itself, as well as to relations and situations related to the place. Through this construction of meanings, their engagement becomes stronger, as attributed meanings reflect personal values, which can further be made more explicit, negotiated and re-defined through intercultural dialogue.

Although place meaning and place attachment are not themselves values, they embody different ways of individual sensing and sensemaking, which are both ways of perceiving one's social identity and values. Sensing is about the different ways of feeling a (and in one) place, through hearing, touch, smell, sight, and taste (Degen, 2008; Massey, 2013; Rodaway, 2002). Although sensing mainly refers to the non-verbal aspects of perception, linked to our five senses, sensemaking refers to a set of processes through which *"people enact the social world, constituting it through verbal descriptions"* (Brown et al., 2008, 1038).

Community building values

The notion of community is inextricably related to cultural identity, as people belonging to the same community share one or several cultural identities. According to the sociologists Hall and Du Gay (1996, 6), *"identities are points of temporary attachment to the subject positions which discursive practices construct for us"*. Identity is not about being "identical", i.e. always the same, but is a process of continuous identification with certain socially shared practices. People engaged in those practices usually form part of a community, for example an academics' community, an artists' community, or a feminists' community.

Community building is a dynamic concept and process, which is continuously under change and negotiation, as is place. As people's identities evolve, their sense of community might also change. Furthermore, their need to re-create bonds with others may also change in terms of focus, density and objectives. For the community building to take place within different space-place contexts, artistic practices that aim at engaging multiple social groups can be of primary importance.

Interculturality plays a key role in community building. Interculturality¹, defined as cultural interaction in the spirit of building bridges among peoples, has been a particular inspiration for European policies (Lähdesmäki et al., 2020). It is mainly achieved through intercultural dialogue,

1 Unesco, Convention on the Protection and Promotion of the Diversity of Cultural Expressions, 2005.

i.e. dialogue inspired by open-mindedness, empathy and multiperspectivity in face of any type of cultural otherness (Barrett, 2013). Bringing people from different cultural backgrounds together under a common goal is the basis and first step for intercultural dialogue to take place. Moreover, they need to share and exchange their cultural expressions (e.g. creation of cultural artefacts) and impressions (e.g. opinions about cultural phenomena) so that a collective sense of belonging can arise (Zakaria et al., 2004) work and structure relationships, global virtual teams require innovative communication and learning capabilities for different team members to effectively work together across cultural, organizational and geographical boundaries. Whereas information technology-facilitated communication processes rely on technologically advanced systems to succeed, the ability to create a knowledge-sharing culture within a global virtual team rests on the existence (and maintenance. It is through sharing of knowledge, perceptions, and understandings that community building can be nurtured. This interaction can happen real-life or in virtual environments, sometimes invisible and sometimes dramatic (Figure 1).

Nonetheless, for any interaction to be meaningful, either in terms of sensing or sensemaking, sharing ideas and artefacts are commonly not sufficient for people to create deeper community bonds, thus joint activities as part of their everyday practice are necessary. According to Wenger (2011, 2), *“members of a community of practice are practitioners. They develop a shared repertoire of resources: experiences, stories, tools, ways of addressing recurring problems – in short, a shared practice. This takes time and sustained interaction”*. Joint activities, i.e. activities where people can learn from each other, are an important part of a community’s shared practices.

These theoretical foundations help us to identify the main issues to be considered in the quality evaluation of creative placemaking. The three main social processes which underpin quality evaluation – creative participation, social engagement and community building – and the core values that are inherent to them are summarized in Table 1.

The values described above are generic, i.e. similar to those applied in most placemaking activities. For a specific activity, additional values may apply. For example, Alexander and Hamilton (2015) refer to the importance of the “hedonic” value in their “placeful station” placemaking activity. Which values will be promoted and how, largely depends on the specific goals of each placemaking activity.

Quality evaluation asks for the establishment of a set of best-practice standards to build an evidence base for innovative approaches to community par-

ticipation and engagement. This engagement practice can be further improved by the identification and articulation of social impact criteria, manifested in assessable processes and materials, relevant to the achievement of each placemaking activity goals (Nurse-Bray, 2019). This social impact assessment process is described in the following section.

Social impact assessment

The assessment of the impact of creative placemaking is not an easy enterprise. According to (Markusen & Gadwa, 2010) it is difficult to determine the precise impacts of a localized intervention, because so many other things are simultaneously influencing the environment. More scholars agree on the problems related to the *“conceptualization and measurement of the ways that creative placemaking influences a place and the people who live in, work in, and visit it”* (Stern, 2014, 84). However, other scholars claim that it might be possible for planners, designers, and policy makers to propose criteria that can be concretely operationalised in qualitative or quantitative measures, as long as those criteria do not end up to be “fuzzy concepts”, using Markusen’s (2003) term.

Another problem that relates to all programme evaluation initiatives is the so-called “goal paradox”: although goal attainment is by-large the focus of most mainstream evaluation programmes, goal setting and clarification is itself problematic (Friedman et al., 2006). What goals can do is to *“provide direction for action and evaluation”* (Patton, 2008, 147). However, the assessment of these goals require a clear and shared view of the values promoted through the placemaking activities. We would add that once these values are defined, they can be used as criteria for setting impact indicators. In addition, following our experiences with placemaking activities and their evaluation, the measure and the scale of the local social impact needs to be normalised to reach a comparable assessment among different rates and occurrences of the evaluated actions. As (Walljasper, 2007, 159) contends, *“sometimes the impact of bringing people together for a meal is less dramatic but no less meaningful”*. In this sense, the action of bringing people together is assessable per se, as long as we find ways to assess its quality.

A key objective of creative placemaking is to transform spaces into places by changing their aesthetic, physical and social qualities (Kelkar & Spinelli, 2016). The relational aspect of a place is manifested through the community’s identity not only in the built environment, but also and mainly through the promoted inclusiveness and engagement of different social groups living and acting in the place. Likewise, the identity of the placemakers

themselves is subjected to change, as the relationships with the place might transform the way they perceive themselves as change agents, thus becoming reflective practitioners (Schön, 1987) able to deal with uncertainty (Tracey & Hutchinson, 2016). In such self-reflective practices, individuals change when they “reflect on what they are saying or doing, analyse the possible consequences, and attempt to adjust their behaviour as a result” (Frame, 2014, 93).

An attempt to define social impact in terms of assessing identities (of space, community, individuals) is both a precarious and ambitious one. This is because the identity of places is constantly changing over time, and attributing such a change merely to a placemaking activity might overlook other important socio-political factors whose influence lie beyond the capacities of the placemakers involved. An alternative approach is to explore those identities and their change over time through recognised social discourses before, during and after the placemaking activity.

Monitoring social discourses

The term discourse implies a social and mental dimension; it is both a linguistic and a socio-historical object². It can be understood as transphrastic unit that is subjected to rules of organization that exist in a given social group. These rules may be related to the construction of a narration, a dialogue, an argument, and they can use verbal and non-verbal languages directly linked to the social group in which that discourse is produced (Maingueneau, 1999). As Fairclough (1993, 136) recalls, a social discourse embodies three dimensions: “it is a spoken or written language text, it is an instance of discourse practice involving the production interpretation of texts and it is a piece of social practice”. Accordingly, the interpreted / produced texts are based on the social practice that constrains them and, at the same time, the plurisemiotic materiality of the texts bear traces of this same social practice.

The use of social discourses as materials for evaluation starts by gathering all information about a social context for then studying the plurisemiotic materiality within a discourse (Voloschinov, 1977). A great part of this materiality is related to values revealed through discourse. As Walmsley and Birbeck (2006, 116) recognize that “values emerge from lived experience – through interaction and social exchanges in families, communities, cultures, and societies.” In our case, these are values related to creative participation, social engagement and community building.

2 The construction of several semiosis with certain rules characterises the specificity of a discourse. However, plurisemiotic construction is always explicit. It is therefore up to a theory of discourse and its historical, social, cultural inscription to be able to unravel its functioning. Most importantly, as Bakhtin (1981) points out, is that all languages are composed of several social languages, according to different specific groups, each of which makes use of specific semiosis in a particular way.

Capacity of arts

Another important goal of social impact assessment are the artistic practices themselves. The capacity of arts to become an agent of change, and particularly their potential for creative placemaking has long been recognized by scholars, architects and artists. Miles (2005) has discussed the potential of arts as part of social processes aimed at defining complex fields of public interest. This is particularly evident for the discussion of the role of arts in activating spaces and placemaking. Miles contrasted this social role of the arts with the non-site-specific arts which function as a wallpaper or a decoration and exclude the interests of the community; often covering the socio-economic-cultural problems behind them.

On the other hand, Rendell (2006) has discussed two different agencies of arts. The first is their capacity for opening up new lines of thinking about the relationship between places, situated arts and communities. In this regard, art can play a mediator role in the conversations between different disciplines and community members, thus helping to interlink places and people through creative placemaking practices. According to Rendell, the second agency of arts is to approach urban projects in a critical manner, paying more attention to wider social and political concerns beyond the established disciplinary boundaries (Figure 2). Building on Lacy (1995) Rendell (2006, 16) called this critical spatial practice “a socially engaged art practice with a focus on engagement, interaction, context and process”.

Space-place transformation

As a place’s identity changes, and a public space becomes a meaningful place, community building changes as well, because different people attribute different meanings and uses to the same space. The notion of public space plays a key role in community building, not as much in the sense of territorial limits but mainly in the sense of situated action and discourses. The space in which a community, defined as a group of people sharing a common goal and/or practice and/or identity, acts and interacts among its members and with members of other communities, becomes part of the community itself. Nonetheless, the relation of place with community is not unidirectional: the more placemaking becomes a community-led ideation and implementation process, the more its future impact on community building can be secured.



Figure 1: An example of virtual interaction – sharing the perceptions of home place and stimulating creative participation in times of confinement. A blog-based collection (A Confined Place, What does your window say?) of artworks and photos created by students of La Salle School of Architecture and Nova University of Lisbon, 2020 (Photo Credits; upper left bottom right: Olav Haugen, Diego Hoefel, Jihane Moudou, Daniela García, Nathalie Bourget, Amanda Rojas, Guillem Hernández, Rubén Cruz).



Figure 2: A collective artistic installation in the city of L'Hospitalet (Barcelona, Spain) made by students from the School of Architecture La Salle and high school pupils from secondary schools of the Bellvitge neighbourhood, to create a new sense of place in public spaces (Photo Credits: Leandro Madrazo, School of Architecture La Salle, Ramon Llull University).



Figure 3: A collective artistic installation in the city of L'Hospitalet (Barcelona, Spain) made by students from the School of Architecture La Salle and high school pupils from secondary schools of the Bellvitge neighbourhood, to create a new sense of place in public spaces (Photo Credits: Leandro Madrazo, School of Architecture La Salle, Ramon Llull University).

Table 1: Quality social processes and their core values.

CREATIVE PARTICIPATION	
<i>Inclusiveness</i>	To create opportunities for people from different cultural backgrounds (with ‘culture’ not being limited to ethnicity but also to other cultural identities, e.g. age, language, gender, etc.) to engage with each other.
<i>Creativity</i>	To foster participants’ creative potential through making available resources and clear instructions, also showing a certain flexibility towards the approach adopted.
SOCIAL ENGAGEMENT	
<i>Place meaning</i>	To help participants ascribing multiple meanings to a place either through sensing (feeling) or sensemaking processes
<i>Place attachment</i>	To help participants creating bonds with a place either through sensing (feeling) or sensemaking processes
COMMUNITY BUILDING	
<i>Interculturality</i>	To bring people from different cultural backgrounds together under a common goal
<i>Sharedness</i>	To help creating a common sense of belonging through sharing knowledge, perceptions, and understandings
<i>Joint activities</i>	To develop a shared repertoire of resources with joint activities, i.e. activities in which people learn from each other

CONCLUSION

Observing and assessing the evolution of places and inherent identities as a result of creative placemaking poses a number of challenges. Firstly, we have established a framework to address the question of the quality assessments and monitoring of the creative placemaking practices. The application of this framework requires instruments to collect information, to track and assess different categories of impacts, and to “measure” the transformation of the evasive aesthetic, physical and social identities. Secondly, each socio-physical place would be transformed differently and individually when subjected to the a creative placemaking practice. Therefore, we need to find some common, universal, or generic aspects embodied by these transformations which can be applied to assess the singularity and distinctiveness of a specific creative placemaking process. To this end, we have identified the core values of a quality social process around their key

generic aspects implicit in a creative placemaking practices: creative participation, social engagement and community building. Likewise, we have proposed specific techniques to assess their social impact through the social discourses, art’s capacity to act as changing agent, and potential to transform existing spatial qualities, physically and symbolically. The proposed framework is currently applied in the assessment of the activities carried out in A-Place.

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VREDNOTENJE KREATIVNIH PRAKS USTVARJANJA PROSTORA SKOZI SPREMINJANJE VREDNOT IN VPLIV NA DRUŽBENO-FIZIČNE PODOBE PROSTORA

Chrysi RAPANTA

Univerza Nova v Lizboni, Oddelek za družbene in humanistične vede, Av. de Berna, 26-C, 1069-061, Lizbona, Portugalska
e-mail: chrysi.rapanta@fcsh.unl.pt

Leandro MADRAZO

Univerza Ramon Llull, Oddelek za arhitekturo La Salle, Sant Joan de La Salle, 42, 08022, Barcelona, Španija
e-mail: leandro.madrado@salle.url.edu

Maria Irene APARICIO, Nuno FONSECA & Rosalice PINTO

Univerza Nova v Lizboni, Oddelek za družbene in humanistične vede, Av. de Berna, 26-C, 1069-061, Lizbona, Portugalska
e-mail: maparicio@fcsh.unl.pt; nmfonseca@fcsh.unl.pt; rosalice.pinto@fcsh.unl.pt

Špela VEROVŠEK

Univerza v Ljubljani, Fakulteta za arhitekturo, Zoisova 12, 1000 Ljubljana, Slovenija
e-mail: spela.verovsek@fa.uni-lj.si

POVZETEK

Prostor igra ključno vlogo pri gradnji identitete posameznika in skupnosti. Je rezultat interakcije med ljudmi, dejavnostmi in same prostorske stvarnosti v nekem časovnem obdobju. Urbanistični pristopi, ki spodbujajo vključevanje prebivalcev in graditev občutka pripadnosti v določenem lokalnem prostoru so danes številni in pogosto obravnavani tako v akademskem, strokovnem kot ekonomskem smislu – od kreativnega ustvarjanja prostora, taktičnega urbanizma, pop-up koncepta do klasičnih participativnih praks z vključevanjem številnih in različnih akterjev v proces načrtovanja. Medtem ko so v implementacijskem oziroma izvedbenem smislu omenjene prakse ustvarjanja prostora dobro zastopane, pa se manj pozornosti namenja kritični oceni učinkovitosti teh procesov. Predvsem je očitno pomanjkanje metod za sistematično spremljanje in vrednotenje doseženih učinkov intervencij oziroma izvedenih kreativnih prostorski praks. V prispevku zato razvijemo pregled in ciljno razpravo o možnostih in potencialih vrednotenja prostorske stvarnosti v odnosu do načrtnih transformacij prostora. Prispevek osnujemo na temeljnih virih in obstoječem znanju, razvijemo pa lasten vidik vrednotenja kreativnih praks, ki temelji na evalvaciji oziroma spremembi promoviranih vrednot in vplivu akcij na družbeno-fizične vidike prostora.

Ključne besede: kreativno ustvarjanje prostora, skupnostna umetniška praksa, prostorska afiniteta, vrednotenje

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MEMORABLE IMPRESSIONS AS SIGNIFICANT DESCRIPTORS OF THE QUALITIES OF A HOUSE: EXPLORING THE EXPERIENTIAL QUALITIES OF THE TRADITIONAL HOUSE IN TETOVO

Aurora SAIDI

University of Ljubljana, Faculty of Architecture, Zoisova 12, 1000 Ljubljana, Slovenia
e-mail: aurora.saidi@unite.edu.mk

Matija SVETINA

University of Ljubljana, Faculty of Arts, Department of Psychology, Aškerčeva 2, 1000 Ljubljana, Slovenia
e-mail: m.svetina@ff.uni-lj.si

Tadeja ZUPANČIČ

University of Ljubljana, Faculty of Architecture, Zoisova 12, 1000 Ljubljana, Slovenia
e-mail: tadeja.zupancic@fa.uni-lj.si

ABSTRACT

North Macedonia's traditional houses have been extensively studied, including those in Tetovo, yet very little is known about the experiential qualities of the traditional house as sensed by its inhabitants. Since it is difficult to find a traditional house in Tetovo that is habitable today, the paper explored its experiential qualities through dwellers' memorable impressions as significant descriptors of the house's qualities. The research employed a qualitative approach to study inhabitants' memorable impressions and suggests that the experiential qualities of the traditional house in Tetovo are closely related to how the spatial properties of the house as a whole fulfil the inhabitants' multiple psychological and socio-cultural needs.

Keywords: memory, architecture, qualitative content analysis, traditional house, Tetovo

IMPRONTE DI MEMORIA QUALI DESCRITTORI SIGNIFICATIVI DELLE QUALITÀ DI UNA CASA: ESPORARE LE QUALITÀ ESPERIENZIALI DELLA CASA TRADIZIONALE A TETOVO

SINTESI

Le case tradizionali della Macedonia del Nord in generale, e quelle di Tetovo nello specifico, sono state ampiamente studiate; ciononostante, si sa ancora molto poco sulle qualità esperienziali della casa tradizionale così come venivano percepite dai suoi residenti. Al giorno d'oggi, trovare una casa tradizionale in condizioni abitabili a Tetovo è difficile, pertanto l'articolo ha esplorato le relative qualità esperienziali attraverso le impronte di memoria degli abitanti quali significativi descrittori delle qualità della casa. Nella ricerca è stato impiegato un approccio qualitativo per studiare le impronte di memoria dei residenti che suggerisce che le qualità esperienziali della casa tradizionale a Tetovo sono strettamente legate al modo in cui le proprietà spaziali della stessa soddisfano i molteplici bisogni psicologici e socio-culturali dei suoi residenti.

Parole chiave: memoria, architettura, analisi qualitativa del contenuto, casa tradizionale, Tetovo

INTRODUCTION

The spatial properties of the house become meaningful through inhabiting as its dwellers roam around, engaging all of their senses, in various psychological and socio-cultural contexts. The house qualities detected by the inhabitants, seen from their perspective as active actors in the physical realm of the house, are referred to in this paper as experiential qualities of the house. To show that exploring the experiential qualities of a house can reveal very intriguing and peculiar dimensions of a house's qualities, the traditional house in Tetovo is selected because, in ordinary conversations with older people in her family, the first author had detected how many significant and impressive house qualities were locked away in the memorable impressions of the inhabitants. Moreover, the traditional house in Tetovo and many cities of North Macedonia, as well as broader in the Balkans, have been studied extensively by many scholars, yet not from the inhabitants' perspective. Hence, investigating the experiential qualities of the traditional house in Tetovo might trigger further research into the experiential qualities of traditional houses, and houses generally, in other cities/countries.

The literature review in part one of this paper shows that the scope of studies on the traditional house in Tetovo and North Macedonia generally, considers the genealogy of traditional house types, describes and classifies their functional entities and properties, analyses their anthropomorphic measurements and proportional relations of the parts and the whole, the material used and constructive solutions etc., whereas only a few studies describe their experiential qualities. Even when the latter is done, studies present the traditional house's experiential qualities only as concerns its spatial configuration, paying little attention to how its inhabitants in different psychological and socio-cultural situations perceive it. Very little is known about the experiential qualities of the traditional house in North Macedonia as sensed by living in it. The paper will thus demonstrate how to explore the experiential qualities of the traditional house in Tetovo. Since finding a traditional house in an inhabitable state is difficult today, its experiential qualities are explored through its inhabitants' memorable impressions.

The olden days in Tetovo, as recalled by people aged 70 or higher through vivid stories, or people aged 50–60 years through vague childhood memories, are remembered as hard times compared to today. Times characterised by unstable political and economic circumstances, the deprivation of many psychological and socio-cultural needs and rights (inequality in gender

education and representation in public life, difficulties practising one's religion, limits on use of the native language in education and public institutions etc.), deficient health services, cities and villages with poor infrastructure, unsophisticated houses in terms of thermal and acoustic insulation, inventory, hygiene etc. Yet, surprisingly, the retrospective narrative is imbued with fascination and admiration whenever the narrator recollects how creatively these difficult circumstances were used to generate relatively optimum living conditions. The same enthusiasm is evident even when describing the qualities of the traditional house in Tetovo. The memorable impressions of individuals who have spent at least a few years living in a traditional house depict significant aspects of its experiential qualities. Therefore, the second part of this research elaborates on why memorable impressions hold the power to reveal important information, how experiences actually become memorable and why/how they affect the perception of the world generally and architecture in particular, and why memory should be understood and studied in architecture. The memory of a city/neighbourhood/house/place is not only important for providing information about the past, but also for shaping how the present is perceived and the future is imagined. Thus, in the same section, the approaches to architectural memory taken by certain domestic and international architects are briefly discussed to show how the research findings could be incorporated, interpreted and recreated in future designs.

A qualitative approach is adopted to study inhabitants' memorable impressions. In-depth interviews revealed that the experiential qualities of the traditional house in Tetovo entail sequences of inhabitants' actions across the house as they pursue their everyday activities and needs. The house is remembered as a spatial configuration, with particular physical properties that help fulfil or suppress inhabitants' various psychological and socio-cultural needs. However, through qualitative content analysis of dwellers' memorable impressions, two themes and ten subthemes that illustrate how the spatial configuration of the house as a whole and its physical properties met the inhabitants' multiple needs were extracted. The house's experiential qualities derived from memorable impressions are described in a general form so that they can be easily recreated and adapted to individuals' contemporary needs in different socio-cultural contexts. Moreover, they are complemented with quotes by the respondents and supporting theories from the fields of psychology, sociology and neuroscience, as well as illustrated with sketches and pictures for extensive elaboration.

REVIEW OF THE LITERATURE ON THE TRADITIONAL HOUSE IN TETOVO

Tetovo has always been an important political, economic and socio-cultural centre in North Macedonia¹¹ and beyond. While it has existed since antiquity, not much is known about its urban structure until the end of the 18th century (Aleksievska, 1985; Ferati, 2011). In the late Ottoman period, Balkan urban architecture was described in the travelogue of a few passers-by as “shabby, dilapidated, and a fire hazard”. However, in the 19th century a series of Ottoman authorities’ decrees obliged the population to build houses from stone or brick (Marinov, 2017, 452), thereby generating a more time-resistant material culture. Right after World War II, upon the establishment of national republics under the umbrella of socialist Yugoslavia, this led Macedonian institutions and authorities, among others, to call on researchers to study and promote the features of the material culture of the past, and to help build the national image (Grabrijan, 1986; Elezi & Saliu, 2016; Marinov, 2017). Since then, in various studies, the traditional house in Macedonia, including Tetovo, often referred to as Macedonian “vernacular”, “folk”, “national”, “popular” architecture, “architecture without architects” or “architecture with low levels of planning levels”, has been presented as the embodiment of multifaceted qualities. Grabrijan (1986), Aleksievska (1985), Tomoski (1960), Čipan (1982) etc. appraise its masterful integration with the natural setting; its careful use of local natural resources as building materials and their adaptation to various climatic conditions; its flexible organisation of functional entities in the horizontal and vertical plane according to anthropometric measurements; the composition of its main volumetric shapes in an interesting play of solid and void; the use of decorative elements in its exterior and interior, as well as the atmosphere and multisensory experience provided by the house as a whole. Moreover, they acknowledge some characteristics of the traditional house in Macedonia as qualities that can easily be compared with those of Le Corbusier’s or Adolf Loos’ modernist designs. The timber-framed upper floor construction of the traditional house in Macedonia gives the same flexibility in the organisation of space, façade design and openings as Le Corbusier’s free plan does. The distribution of the house’s programme vertically, with utility and storage rooms on the ground floor while living spaces on the upper, is another similarity. Whereas the most praised feature shared by the Macedonian

and both Le Corbusier’s and Loos’ modern houses is the spatial plasticity of the exterior and interior. The gradual and sequential enlargement of the upper storeys with oriels and consoles results in exterior plasticity, while the interior plasticity is generated by the dynamism of movement across various levels of horizontal planes with different heights – “the plastic path” (Grabrijan, 1986, 81–86, 115, 129; Elezi & Saliu, 2014). Similarities between the traditional and modern house are also found in the use of anthropomorphic measuring units and in the proportional relations between the parts and the whole (Aleksievska, 1985). These similarities were often highlighted in subsequent studies, although authors have been greatly pre-occupied in revealing the genealogy of the types of the traditional house in Macedonia – whether it involves an original mix of European and Oriental houses (Grabrijan, 1986), is pure Macedonian with roots in Greek archetypes (Tomoski, 1960), Slavic/Byzantine (Čipan, 1982), Balkan (Nikoloska, 2003) or Ottoman (Marinov, 2017).

The characteristics of the traditional house in Macedonia are revealed in the study of its spatial, physical and functional properties in various cities. In general, the traditional house in Tetovo is divided into two groups: houses situated in the Sharr foothills (Figure 1a), which mainly belong to the Christian and poorer Muslim community, and houses located in flat areas (Figure 1b) belonging to the ruling Muslim elite. Due to huge concentration, houses on steep terrain often occupy small areas of irregular shape. The frequent absence of a backyard and the arrangement in a row makes the house follow and be oriented towards the street. In contrast, the houses in the flat areas are freely distributed, closed to the street, and oriented towards spacious gardens. In both cases, the houses mostly contain one or two floors. The ground floor, usually of stone or rubble, is the service level. Its main space is an open porch called “hajati” or “trem” around which 2–4 rooms are arranged. The lateral rooms are used for storage and performing economic activities, sometimes also for keeping domestic animals. The hajati may be positioned in front of the rooms, in one of the corners or in the centre, and through it, a connection with the street in houses on steep terrain is established. Further, the straight, L- or U-shaped wooden stairs, which lead to the first floor, are usually located in the hayati or in front of it (Aleksievska & Voljinec, 2000). The timber-framed construction, with walls filled with wattle and earth/bricks, and the wooden beams covered with wooden planks, allows the first floor’s volume to protrude over the main corpus of the ground floor, thereby widening the spaces for family living and receiving

11 Before 2019, North Macedonia was called Macedonia. To allow easier reference to traditional heritage studies prior to 2019, in this text it will be referred to as Macedonia only.



Figure 1a: Traditional houses on steep terrain, St. Gocce Delcevo, Tetovo (Photo: Aurora Saidi).

guests. The rooms are arranged around an open veranda called “*çardak*”, which always has the best views of either the street or the garden. Its size varies but it is not uncommon for it to be larger than the rooms themselves. Due to its ventilation, it was also used for sleeping during the day and night. Therefore, special effort was made while shaping it, distinguishing it with different platforms according to the activity performed. The space for communication is on the same level as the rooms, the largest sitting area called “*qyshk*” (köşk in Turkish) is a stair or two higher, which might also be differentiated by another horizontal level on the height of benches called “*minsofa*”. Later, in newer versions of these houses, the *çardak* could also be closed with large windows. On the other side, the rooms were not designed for any specific function; depending on the situation, they were adapted for daily activities or sleeping. Since the furniture was sparse, the presence of the fireplace – “*oxhak*” – in one corner and the built-in closets and the shower cabin – “*hamam*” – in one of the walls of Muslim houses, left the rest of the room free. Initially, the sitting and sleeping were arranged on low cushions, later transformed into cushioned benches – “*minder*” – arranged near the windows. One room was adapted as a kitchen in cases where it was



Figure 1b: A traditional house on flat terrain. The house of Mehmet Palloshi, Tetovo (retrieved from Kiprianovski & Trajkoska, 2007).

not located in the garden or on the ground floor, while one of the others was larger and served for receiving guests. It contained a greater amount of wood-carved decoration applied to the ceiling and built-in closets. In the Muslim elites’ houses called “*konak*”, there is a distinction between the quarters for receiving guests (*selamlik*) and those for women and family life (*haremlik*). Similarly, when present, it was organised on the second floor too, usually adapted for summer spaces and receiving guests. The roof is not very sharp, mainly four-sided with deep and overhanging eaves and covered with round tiles or slate. (Aleksievska & Voljinec, 2000; Marinov, 2017).

The aforementioned studies on the traditional house in Macedonia concentrate on identifying and classifying the house’s physical and functional properties, disregarding or paying very little attention to its experiential qualities. Even when the latter are considered, such qualities are only examined for its spatial configuration as perceived by a few individual researchers/architects. Very little is known about the experiential qualities of the traditional house in Macedonia as perceived by its inhabitants by living in it. This paper therefore intends to explore the qualities of the traditional house in Tetovo as lived by its inhabitants, by those who have experienced the house’s spatial qualities while moving inside with their body equipped with various sensory-motor capabilities in various psychological and socio-cultural circumstances. Not many traditional houses are left today in Tetovo. They have either been substituted by new ones or are uninhabitable. Still, one can find people who have lived in a traditional house for a few decades or less than one. The picture in their head might not describe the house as accurately as it was, but it certainly captures its most salient features and the most remarkable experiences they had there.

Therefore, inhabitants' memorable impressions were used to explore the experiential qualities of the traditional house in Tetovo. The next section shows why memorable impressions hold the power to reveal important information, how experiences actually become memorable and why/how they affect the perception of the world generally and architecture in particular, and why memory should be understood and studied in architecture.

MEMORABLE IMPRESSIONS AS SIGNIFICANT DESCRIPTORS OF THE EXPERIENTIAL QUALITIES OF THE HOUSE

The brain's cognitive faculty to encode, store and retrieve past experiences when required is called memory. Still, not all experiences make their way to memory. While some are recalled to the tiniest details, other experiences may appear too vaguely or not at all. Cognition processes sensory data in a very selective way. As beings with particular sensory-motor capabilities, acting embedded in a specific socio-cultural environment, at every instance people receive a million bits of information from the surrounding environment. This sensory data remains in the nervous system long enough for the brain to interpret it, entailing the first storage stage called the sensory register. Sensory memory is a sort of photographic memory, rich in detail, but its retention capacity is very small. As the senses are constantly bombarded with new information by enacting with the world in motion, the sensory impressions evaluated to serve the goal are selected for processing in the short-term memory, while the rest are forgotten and replaced with new ones. If the processed sensory impression is evaluated as important, meaningful and pertinent for the future, it will move from the short-term memory to the long-term memory. Short-term memory, otherwise known as working memory, when necessary, also helps to retrieve information stored in the long-term memory to quickly make sense of newly received sensory data (Loftus, 1980; Wang, 2011; Lalchand, 2012).

Memory is hence not simply about remembering meaningful past information. Evolution favored the development of this faculty to use the stored data to understand new sensory impressions quickly and efficiently in order to instantly avoid danger and thereby increase survival possibilities. A rapid response to external sensory stimuli is possible because diverse related information is clustered into single compound units – “concepts” (Mlodinow, 2018, 76–79) or “schemas” (Arbib, 2015, 64–68) – on many hierarchical levels in long-term memory. Simultaneously coordinated multiple schemas compete in parallel to match the rough features of an object (contour/s, shape, texture/s, colour/s, size etc.) to a previously known one such that no further

information gathering is needed to yield understanding. The world out there is largely constant, but whenever something new is encountered, schemas merge, split and cooperate to yield understanding and thereby generate new schemas. For example, enormous time and energy would be needed to recognise a house by processing each pixel, in similar fashion as the way computers operate. Instead, remembered characteristics and experiences gathered in previously encountered houses are stored under the concept *house*. While encountering the contours of an object ending with a prism in the form of a roof, an information resembling the house's characteristic, the clusters of neurons representing the concept *house* are activated to indicate that this object is most probably a house. The activated schemas then further continue to gather only necessary information from the object to ensure that the initial reaction was grounded. The concept *house* might also be activated from non-physical properties, when one hears someone talking about a house, a house smell one remembers while imagining an event that happened in the house, or from any information that was earlier linked to the concept. If the features of a house do not match those of the houses we know, it is difficult to recognise that the object represents a house. Hence, memorable experiences considerably mediate our understanding of the world.

The process of memory consolidation and retrieving indicates that memory is not an exact recording of the content of all experiences. The brain is the most energy-consuming organ in the body and thus the process favours the storing of experiences that are attended repeatedly several times to allow them to be recognised automatically with minimal processing energy. It also ensures the storage of the peak and most remarkable moments of experiences, those accompanied by emotions like pleasure and fear, such that the positive and negative affordances of future circumstances can be assessed quickly (McGaugh, 2013). The selective and constructive nature of memory shows that past recalling does not always correspond to the true nature of reality. There might be a tendency to overrate some past experiences – historical/personal nostalgia (Batcho, 1998) while understimating or ignoring others. However, both cases operate based on the meaning and emotional valence caused by the experience. Thus, memory in general is composed of important information about the past. Moreover, the memory of each experience is also imbued with information about the spatial framework in which it occurred because the memory consolidation process occurs in certain brain regions which also assist navigation and imagination (Malpas, 2012; Arbib, 2016;



Figure 2: *The Macedonian Academy of Science and Art (Reprinted from Stojanoska, 2016).*

Goldhagen, 2017; Mallgrave, 2010). Accordingly, this paper relies on memorable impressions as descriptors of house qualities because, by describing many events of emotional significance, they can provide important information about them.

Studying memorable impressions about a city/ neighbourhood/house/place in general is not only important to understand their perception in the past. The insights generated by memorable impressions also help to understand how places are perceived in the present and what their future developments will most probably look like. A house cannot be recognised if one has never seen a house, whereas the image of a house is built on previous experiences in various houses. This indicates that memory is predominantly individual but, as long as it is also shaped by the broader physical and socio-cultural context in which the individual is situated, it is also partially shared among individuals who belong to the same social group – it is also collective. The collective memory implies that individuals have commonalities in perceiving and understanding the present, also while imagining the future (Halbwachs, 1980; Mlodinow, 2018). Therefore, architectural memory should never be underestimated, especially its experiential qualities, which in this paper are referred to

as inhabitants' memorable impressions since they shape both the way architecture is perceived in the present and how it is imagined for the future.

Indeed, Macedonian and foreign architects have tried in various periods to incorporate and contemporarily interpret architectural memory in Macedonia. Since the period between the two World Wars, influenced by the nineteenth-century European and Balkan historicism, many architects have mixed modern principles of design with traditional architectural elements in different building typologies to emphasise and promote national identity through the special features of the traditional architecture (Grčev, 2004). Later, parallel to the postmodern global movement, a turn to tradition once again became evident. For example, the building of Macedonia's Academy of Science and Arts (1976) by Boris Čipan (Figure 2) represents a mix of international modern style and traditional architectural elements, whereas Stokovna Kuka Most (1977) by Tihomir Arsovski (Figure 3) is a more literal imitation of the Macedonian traditional houses (Tokarev, 2014). While reviewing the designs that incorporated traditional architectural elements, either by way of literal historicism or contemporary interpretation, the authors' focus is only on analysing the appearance,

composition, interior decoration, stylistic features or the presence of the most recognisable traditional element – *çardak*. The recreation of the experiential qualities of the traditional architecture in a contemporary way is not a discussed issue. It is unclear and remains to be investigated why and how the architects used traditional architectural elements. The memorable importance of the Macedonian traditional house lies in the fact that its architectural elements as a whole, generated wonderful experiential qualities. While implementing them partially and separated from their original spatial, psychological and socio-cultural context, were they able to evoke comparable experiential qualities to the needs of the contemporary dweller? The memorable associated qualities of *çardak* are not only related to its openness to light and air, nor to its orientation towards wonderful views. *Çardak* was not a simple veranda, a balcony or terrace, it was the heart of the house, the node of all communicative as well as socio-cultural activities in the house, while intentionally or not one found oneself crossing or gravitating towards it. Moreover, if *çardak* does not have the same relation to the other important entities of the contemporary house and adapts equally to the psychological and socio-cultural needs of the contemporary dweller, it is questionable whether it would have comparable experiential qualities to the Macedonian traditional house. The connection to its memory would only be superficial, unable to recreate or evoke its memorable experiential qualities.

The importance of continuing and integrating cultural heritage values in contemporary city planning while designing both public buildings and individual houses was noted by many architects worldwide in the mid-20th century, such as members of Team X (Aldo Van Eyck, Giancarlo de Carlo ...), Suzana and Dimitris Antonakakis, Dimitris Pikiionis, Aris Konstantinidis, Christopher Alexander, Jože Plečnik etc. They presented and developed several approaches to architectural memory, generally suggesting a critical evaluation of the qualities of the cultural heritage and understanding of their wider physical and socio-cultural context. Although they provide valuable lessons on possible ways to address architectural memory and its critical interpretation given the contemporary way of living, they will not be elaborated here because this paper focuses on developing an alternative way of understanding; initially, what the values of the cultural heritage are. The extracted values of the traditional house in Tetovo, presented here as its experiential qualities, may later guide the process of choosing or developing an approach to their interpretation and recreation in a new socio-cultural setting.



Figure 3: *Stokovna kuka Most* (reprinted from Tokarev, 2014).

METHODS

The purpose of this paper is to explore the experiential qualities of the traditional house in Tetovo from the perspective of its dwellers as felt through inhabiting it. As long as finding a habitable traditional house in Tetovo is hard, the experiential qualities of the traditional house will be explored from the memorable impressions of inhabitants who have lived in one of them for at least a few years. The memory consolidation process described in the previous chapter indicates that an inhabitant's memorable impressions should reveal significant information about the experiential qualities of the traditional house in Tetovo. Generating descriptive explanations and theories about the experiential qualities of the traditional house in Tetovo from people's experiences as felt in real settings and situations and understanding why precisely those experiences have remained in memory means the study takes a qualitative approach in nature. Therefore, qualitative research methods were adopted for the collection, analysis, interpretation and reporting of the data (Seamon & Gill, 2016)

The two most common qualitative data collection methods for extracting descriptive interpretations about the highly idiosyncratic nature of people/environment experiences are focus groups and face-to-face interviews. The latter was assumed to be the most suitable method due to the nature of the problem studied and because some of the target population would be quite old and it would have been difficult to assemble them for group interviews in one place. To recruit the participants, the snowball sampling technique was adopted. This technique helps with referrals/nominations to locate individuals who are unknown, rare and possess specific characteristics. The first interviewee willing to participate in the study thus

provides information for the second, the second for the third, and so on until sufficient data are gathered to answer the research questions (Groat & Wang, 2002). A total of 14 participants were recruited, 8 of whom had lived in a traditional house in Tetovo during childhood (now aged 50–60, 1 male and 7 females), while 6 had lived in a traditional house in Tetovo for more than 30 years (now aged 75–85, 1 male and 5 females).

Previous studies on the traditional house in Macedonia and Tetovo mentioned above indicated many of its characteristics, including a few descriptions of its experiential qualities. Nevertheless, these data were not used as a background to compile pre-determined interview questions. Instead, the research encouraged an inductive approach to the problematic, to elicit understanding and explanation of the phenomenon through data collected from the interviewees. Therefore, the interviewees were encouraged to talk by asking them one open-ended question: Could you please describe the traditional house as you remember it?

“The intention of an unstructured interview is to expose the researcher to unanticipated themes and to help them develop a better understanding of the interviewees’ social reality from the interviewees’ perspectives” (Zhang & Wildemuth, 2009). Only when something was unclear was the narration interrupted by adding extra questions of the “why”/“how” problematic to obtain greater insight. The respondents were aware that the research would be of interest to the architectural field and thus a few of them initially provided mainly physical descriptions of the house, such as its functional entities and their characteristics. In this case, they were reminded that they could additionally freely describe anything they recalled related to the house, such as events, everyday activities, what they found particularly interesting, valuable, appropriate etc. The interviews were conducted in the respondents’ houses. They were asked to choose a place where the conversation could flow without interruption, and only in the presence of the researcher and interviewee. This meant they usually chose one of the rooms in their house. All of the interviews were sound recorded with the interviewee’s consent. The timespan varied, but no interview was less than 40 minutes and longer than 1.5 h.

The method named qualitative content analysis was used to analyse the sound-recorded qualitative data. It is a qualitative approach to written or oral materials, preserved in their original manner of communication, for understanding and classifying its content in similar categories of meanings and themes (Schilling, 2006; Mayring, 2000). Hsieh and Shannon (2005, 1278) defined it as *“a research method for subjective interpretation of the*

content of text data through the systematic classification process of coding and identifying themes or patterns”. Any qualitative content analysis begins with a verbatim transcription of oral materials or a written text. It then follows a set of rules and steps that break down a large amount of text into meaningful parts to be further abstractly coded and organised into categories and themes. The categories or themes may represent the manifest meaning of the content or latent meaning as implied from the broader context of the communication. While there is no agreement in the literature on the steps and rules of the analytical process, this paper followed the procedure described by Erlingsson & Brysiewicz (2017). The transcribed interviews were read several times until a general understanding of their content was achieved. The text was then broken into the smallest meaningful parts – meaning units, which were further condensed into shortened text but with the core meaning preserved – condensed meaning units. These condensed meaning units are labelled with codes. They are two or three words/phrases that best describe what the content is communicating. Codes representing similar related meanings, aspects, differences etc. are grouped into more general descriptive categories. Category names are short too but, unlike the codes, they describe more generalised characteristics of similar codes. *“In other words, categories are an expression of manifest content, i.e., what is visible and obvious in the data. A category answers questions about who, what, when, or where?”* (Erlingsson & Brysiewicz, 2017). Developing categories may be the highest level of abstraction in qualitative content analysis, but in this research the underlying meaning of the categories and their relationships was further analysed and organised into subthemes, and subthemes into main themes. *“Themes are expressing data on an interpretative (latent) level. A theme answers questions such as why, how, in what way, or by what means?”* (Erlingsson & Brysiewicz, 2017).

The analytical process was not linear. On the contrary, iterative or forward-backward movements in developing codes, categories, subthemes and themes were constant. To understand and interpret the complex and multifaceted meanings behind people’s experiences, several notes/memos were written, different ideas and doubts were tested, various tree diagrams were constructed and combined to clarify the interrelations between the expressed ideas until all findings constituted an easily comprehended whole. Each step was analysed in a separate column, whereas in a diagram and a table the clustering of codes into categories, categories into subthemes, and subthemes into themes (and their relationships) was constructed (Table 1, Figure

4). In addition to the diagram, analytical findings as suggested by Vaismoradi & Snelgrove (2019) will be presented with a storyline.

The storyline is an integrated story based on all the analytical findings, restructured in a new way that best illustrates the main themes with all the subcategories and subdivisions as well as their relationships, including supporting contextual citations from the respondents. The usual final step for the findings in an inductive qualitative approach is to search for literature or similar studies, for supporting theories (Sutton & Austin, 2015). In this case, the studies in the fields of psychology, sociology and neuroscience, which have investigated the nature of people/environment interaction, not only supported the findings but were also useful for refining the description and names of the categories, subthemes and themes. Therefore, some of them will be presented along with the findings. Further, the respondents' descriptions provided sufficient information to generate mental schemas and patterns that best depict the experiential quality of the traditional house. Hence, each mental schema will be illustrated with sketches and drawings to ensure they are easy to comprehend and use by the audience of the architectural field in particular.

RESULTS AND DISCUSSION

The qualitative content analysis of dweller's memorable impressions about the traditional house in Tetovo generated two themes and ten subthemes. They provide general descriptions of what the memorable impressions of the house represent, how it is experienced by living in it, and what the experiential qualities of the traditional house in Tetovo are. The themes and subthemes were developed based on the analysis, interpretation and grouping of the smallest meaningful units from the transcribed interviews in more abstract codes, and codes into general manifested meanings – categories, as well as from inferred latent meanings in-between the lines. Initially, several subcategories were developed that were further grouped into three main categories. The themes, subthemes, categories, subcategories and a few of the codes are presented in Table 1, whereas the process of developing them and their interrelation can be better grasped from the diagram in Figure 4. In addition, the storyline below, accompanied by supporting respondent quotations as well as with sketches and pictures, integrates the developed themes and subthemes into a newly restructured narrative that better describes how the traditional house in Tetovo is experienced by its inhabitants.

The dweller's memorable impressions about the traditional house in Tetovo indeed hold compressed

information about its experiential qualities. In general, **the memorable impressions of the traditional house in Tetovo are presented as events of interaction of the individual with the physical entities of the house (Theme 1, Table 1, Figure 4)**. The narrative usually captures the identification of the main – *spatial entities, sub-entities, type of interrelation between them, their properties such as size, texture, material, presence of water, greenery, sound, light etc.* (Category 3 – Subcategories, Table 1, Figure 4), whereas simultaneously, as they move from one entity to another, they recall *the interaction* (Category 2, Table 1, Figure 4) that took place in those spaces to fulfil their *psychological needs* (Category 1 - Subcategories, Table 1, Figure 4). The narrative is developed from time to time in a different way, it is an event of psychological significance that makes recalling the physical properties of the space entity possible. “[...] a stone wall, a wide window in it. We always kept something in the wide parapet. A jug, we called “*shtamë Shkupi*” (a jug from Skopje). My father brought it, it aroused quite a sort of pleasure – a jug of clay that we used to keep flowers in. It was no ordinary thing, no one had a similar jug. I used to embroider a lot of pillows and bed-clothes fabrics near the window, beside the wall, sometimes sitting in there. I remember showing it to my friend in the neighbouring house through the window – to show her how much I could do. Our house's windows faced theirs [...]”. The recollection of these events, like many others described by the respondents, captures the interaction of the individual with the physical entities of the house as the spatial entity/sub-entity – “wall and window”, their properties as material and size – “stone and wide”, their relation with the neighbouring house but also their affordance to “work” near or on the wall in the presence of light, to “see” and “sit”, to fulfil their psychological needs such as “socialising” with a friend, to show “proudness and status” – a rare pot that nobody else had, but at the same time their need for decoration and plants – “beauty”.

After identifying a group of codes that denoted the inhabitant's psychological needs met in the house, the theory of Maslow's hierarchy of needs is borrowed to group and classify them using more accurate descriptive category names. Thus, the house is obviously an object that affords the fulfilment of people's basic needs like physiological needs, safety needs; psychological needs such as social needs (love and belonging) and esteem needs; also self-fulfilment needs like cognitive needs, aesthetic needs, needs for self-actualisation and probably transcendence (Figure 5). Maslow's hierarchy of needs in the field of psychology is a motivational theory of needs. Initially, individuals strive to satisfy their basic needs and, when they

Table 1: The development of Themes 1 and 2 based on the subthemes, categories, subcategories, and some of the codes.

Themes	Subthemes	Categories	Subcategories	Codes
<p>1. The memorable impressions about the traditional house in Tetovo are presented as events of interaction of the individual with the physical entities of the house</p> <p>2. The experiential qualities of the traditional house in Tetovo are manifested through the affordances the physical entities of the house and their interrelation provide to fulfil the psychological needs of the inhabitants</p>	<p>1. The house is adapted to the way of living and other contextual conditions using complex creative problem solutions with affordable techniques and materials.</p> <p>2. The outer entities of the house become part of the house as much as any of its internal entities through physical, visual and acoustic access also as shared activities.</p> <p>3. The vital spatial entities are aligned along the house's main path of movement since it affords greater possibilities for encounter and interaction.</p> <p>4. The house's main entity holds a strategic position in relation to the house's main path of movement, to the other less integrated entities of the house and to outside (views, fresh air, distant contacts with people).</p> <p>5. The house's main entity is distinguished by specific physical properties like size, decoration, material etc. and may also be differentiated with many sub-entities that afford multiple activities for various needs of the inhabitants.</p> <p>6. The lively social life in the house is supported by the establishment of several opportunities for interconnectedness between the spatial entities as a whole, even when inhabitants' private interests might be threatened.</p> <p>7. Imperative technical and functional solutions that afford possibilities to create meaningful places.</p> <p>8. The house kept the inhabitants engaged through its novel and rare characteristics compared to other houses of the same period.</p> <p>9. Spacious spatial entities that met the inhabitants' various needs.</p> <p>10. Despite its unsophisticated technical conditions, the experience of the house upon moving through it unfolds multiple sensations and meanings via materials, textures, the play of light and shadow, smells, dynamic paths of movements, fresh air, social encounters etc., generating an incredible overall atmosphere.</p>	1. The individual	Psychological needs <ul style="list-style-type: none"> • physiological needs • safety needs • social needs • esteem needs • cognitive needs • aesthetic needs • self-actualisation 	<ul style="list-style-type: none"> • food • protection • thermal protection • activity • socialising • status • creative problem-solving • leisure • beauty • order • exploration ...
		2. Interaction	<ul style="list-style-type: none"> • working • playing • gardening • cooking • storage • sleeping • meeting • cooking ... 	
		3. Physical entities of the house	spatial entity <ul style="list-style-type: none"> • spatial sub-entity position • type of interrelation between entities • spatial entity properties (size, texture, material) • greenery • water • sound • smell • light 	<ul style="list-style-type: none"> • front yard • hajat • cardak • rooms • kitchen • terrace • stairs • large • small • higher • open • decorated • wooden • sounds of people and animals • fresh air ...

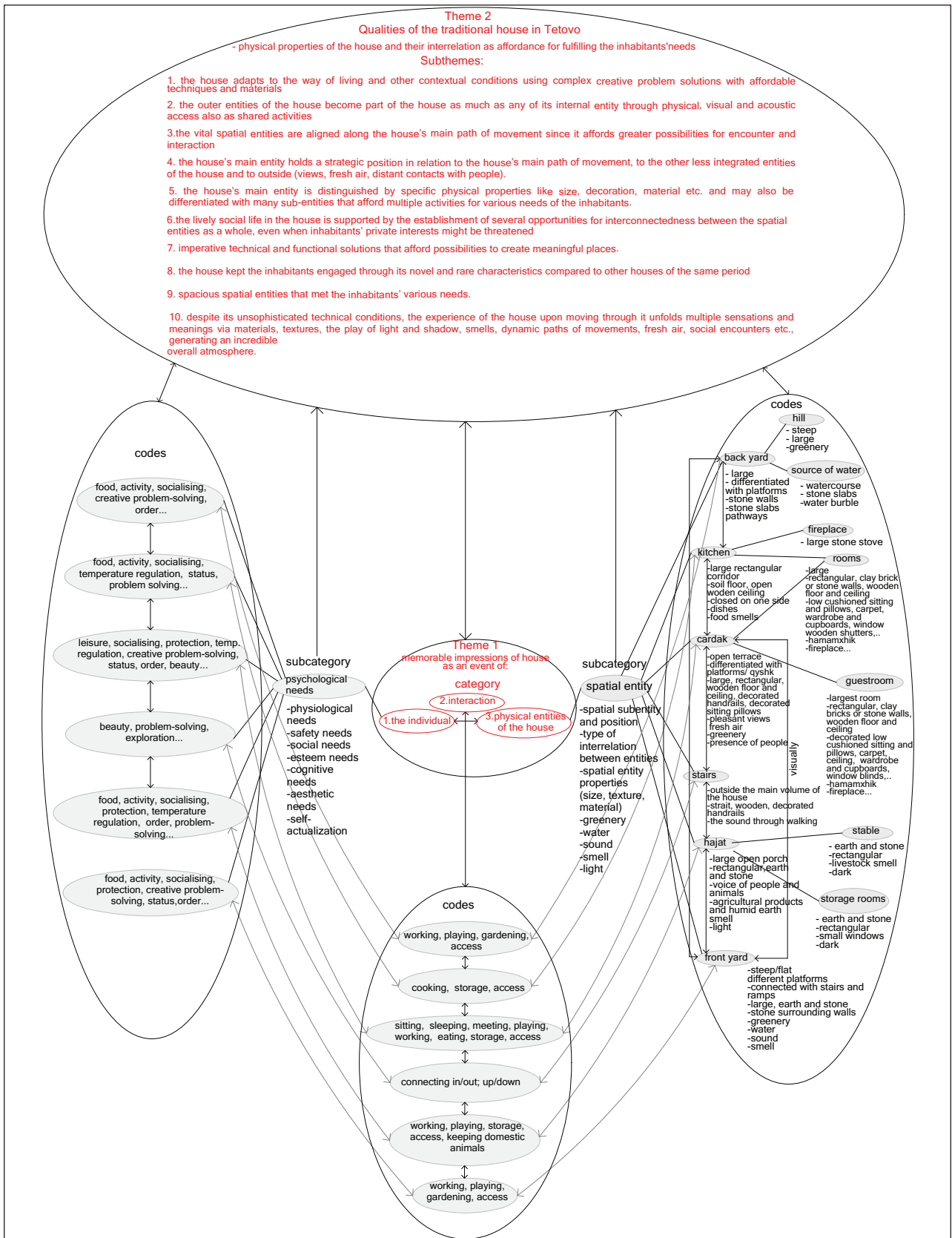


Figure 4: Diagram of the relations between Themes 1 and 2, their subthemes, categories and codes.

are met, they are motivated to work towards achieving the higher levels in the pyramid of needs (McLeod, 2020). This means one can say that **the experiential qualities of the traditional house in Tetovo are manifested through the affordances the physical entities of the house and their inter-relation provide to fulfil the psychological needs of the inhabitants (Theme 2, Table 1, Figure 4)**. Each spatial entity of the traditional house in Tetovo, such as the front yard, *hajati*, *çardak*, rooms, kitchen, backyard, or even the benches, decorated cupboards and ceilings, characterised by specific properties such as size, texture, material, form etc., are specifically orchestrated to fit in the best way possible the needs of the individual as embedded in a particular socio-cultural context. The qualities of the traditional house in Tetovo thus rely on their ability to meet the requirements for survival by way of good ventilation, spaces for eating, leisure and sleeping, to have water as well as protection from different climatic and environmental conditions; spaces for working and storing, for maintaining financial stability; spaces for meeting and socialising so they can generate a sense of belonging and love; spaces where the inhabitants can reveal who and what they are, show their status, gain respect and recognition; spaces that meet their aesthetic needs; spaces in which they can learn, meditate, seek meaning and challenge the image of self but also the need to solve unpredictable problems and be creative through spatial solutions (Figure 4).

Local inhabitants were very well aware of what their needs were. They gradually learned how to accommodate them through the house by optimally using the available materials, technology and terrain configuration. This is evident in the respondents' description of the houses and their creative solutions, yet also in the fascination they express while describing the process of building and problem-solving. "[...] *the houses were all similar, the spaces were the same, hajati, çardak, kitchen, rooms. But, for example, in our house, the first floor was larger than the ground floor. The hill confined the ground floor, and its configuration permitted only that size. On the other side, the first floor was larger, it was extended in the back as much as the terrain allowed for having decent spaces for living, a huge çardak and rooms. I find it quite interesting, now that I recall it. They weren't just a mere cube like the houses today. The houses did not, indeed, have the same conditions as today but, considering the time when they were built, they were very good houses, we had everything we needed*", stated F. S. Another respondent, B. I., while stressing that all the houses were similar, recalls a particular case: "[...] *There were three houses on one parcel. Only one house had access to the street, so half of its ground floor is*

opened and is used as an access road for the other houses, but at the same time as hajati for the house itself". Following the logic of similar discussions, this led to developing one of the sub-themes: **the house is adapted to the way of living and other contextual conditions using complex creative problem solutions with affordable techniques and materials (Subtheme 1, Table 1, Figure 4)**.

In fact, the master builders of Tetovo's traditional houses, often referred to as "unknown" and "builders without professional training" were very good at what they were doing. Respondents mentioned the names of individuals possessing great skills and experience in building, who were actually operating on a comparable level to trained architects by actively rethinking, restructuring and upgrading the main adapted types of the house to fresh challenges and needs in completely novel solutions. Hence, the traditional house in Macedonia and in Tetovo is not always a simple "[...] *vernacular building that reproduces a known and socially accepted pattern.*" From time to time, it is architecture.

Architecture begins when the configurational aspects of form and space, through which buildings become cultural and social objects, are treated not as unconscious rules to be followed but are raised to the level of conscious, comparative thought, and in this way made part of the object of creative attention [...]. Vernacular innovation is therefore included within architecture, but the reduplication of vernacular forms is not. (Hillier, 1996, 33, 35)

Accentuating the traditional house's creative problem-solving process as a quality may have an explanation similar as to the conclusion of a study conducted by Gallese (2017) and his colleagues to understand the process of artwork appreciation by the perceiver. They concluded that the artwork is not only appreciated as a composition of form and colour, nor solely from the meanings it transmits, but the direction, depth and width of the brushstrokes makes it possible to also appreciate the process of artwork creation. Through vision, they can recognise multiple actions that evoke various sensory-motor feelings and emotions, thereby virtually positioning themselves in the place of the art's creator and feel the process as with their body – an embodied cognition. This is possible due to a system of neurons called mirror and canonical neurons. This set of neurons is activated whenever someone performs an action, but also when someone recognises the same action being performed by another person. Hence, they are capable of evoking and feeling almost the same emotions as if they were conducting the activity first-hand, even

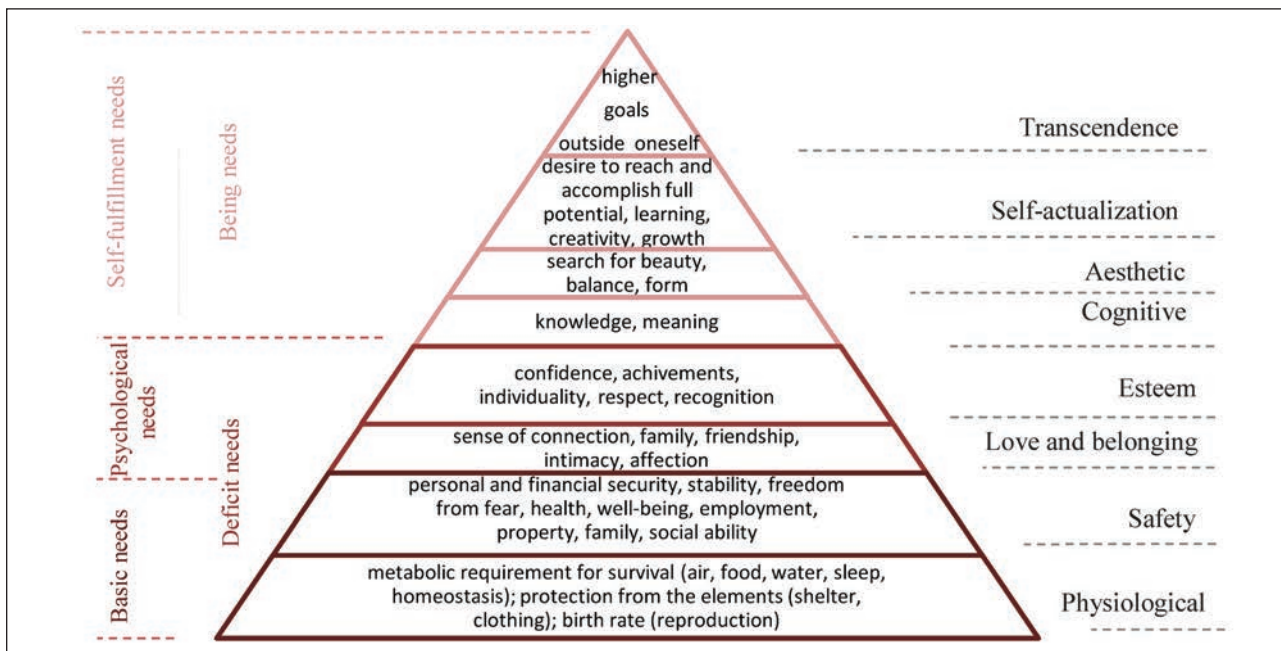


Figure 5: Maslow's hierarchy of needs (Adapted from McLeod, 2020).

when it is performed by somebody else. People are capable of feeling the process empathetically. (Arbib, 2013)

The house's relationship between the front and back yard (Figure 6) once again emphasises people's and builders' ability to arrange the house's entities into an incredible whole that best suits their everyday needs. The narration about the traditional house in Tetovo usually begins with the front yard, and for good reason. Most of the day is spent performing everyday activities moving in and out from the front yard into the house. The front yard, which may be flat and spacious or steep and differentiated with many platforms, is a meaningful part of the house. The transition from one platform to another is established with stone slabs, stairs or slopes whereas each of them, as determined by the terrain's configuration, has been adjusted to accomplish various daily activities. "Down there the mill, slightly higher were the ironworking and wood processing equipment. We were a huge family, a total of 40 members and each had to do some work outside during the day. In the spring, huge boxes of seedlings were scattered throughout the yard, while we as children usually played and ran among the adults from one side to the other", as F. O. described the yard of her house (Figure 6 d). Sh. S. remembers her house as being small but with a huge flat garden full of plants and fruit trees. "In the garden, we also had a small hut – we used to call it *mutfak*. In spring and summer, my mother used to cook there." (Figure 6 a) Similarly, Sh. A. recalls the garden in the backyard as "huge

and with lovely green grass. We used to stay there always when receiving guests [...]" (Figure 6 b). There were also houses with both a front and a back yard. In these cases, they were usually connected not only through extra yard space around the house but also through the house itself. The physical and visual connection of these spatial entities through windows and terraces generated a unified whole that not only facilitated the daily activities but also made the movement a pleasurable journey throughout the entire house. There were also many activities in the backyard, with B. B. remembering that he entered "the backyard from the street, through the "kapixhik" [a small door]. I used to work there, and I had access to the kitchen through a door while I was done working in the backyard. The kitchen floor used to be paved with mud, so we were not forced to take off our shoes to enter the house. We could go and sit in the *çardak*, or continue through the stairs and go to the front yard. This was good until I got married [he laughs]. My wife didn't want us to go in the house wearing shoes, she made us take them off at the beginning of the stairs." (Figure 6 f). Another respondent, F. S., recalls this as one of her favourite things about the house. "I really enjoyed roaming around the house as a kid, through the sloppy terrain beneath the eaves, and arriving in the backyard. Then you went back to the front yard through the house. Even with the kids who first came to our house, I used to do that to show them how amazing it was." (Figure 6 e) The integration of the outside and the inside to create a unified whole is another experiential quality



Figure 6: *The relation of the front yard and backyard with the house. Flat terrain: a) house with a front yard; b) house with backyard; c) house with a front yard and backyard. Sloppy terrain: d) house with a front yard; e) house with a backyard; f) house with a front and backyard. The mix of various colours shows the multitude of activities and needs performed in each spatial entity: green – maintaining flowers/plants; red – cooking, pink – eating; yellow – working; blue – playing; grey – storage.*

of the traditional house in Tetovo, implying that **the outer entities of the house become part of the house as much as any of its internal entities through physical, visual and acoustic access also as shared activities** (Subtheme 2, Table 1, Figure 4).

The above quotations by the respondents, and many similar ones, also imply other important things. The description of the path from the front yard, through the house, to the backyard and vice versa crosses throughout several spatial entities such as the *hajaj*, *čardak* and kitchen. These entities actually represent the house's main communication, functional, and socio-cultural nodes. The *hajaj* usually represents the ground floor (Figure 7). It is a large

open porch that serves as an access point for at least two or three spatial entities such as the storage and technical rooms but also for the place where domestic animals were kept – a sort of stable. The *hajaj* was also an extension providing shade for the front yard. Most of the activities that are conducted in the front yard span to the *hajaj* and vice versa. On the other side, the *hajaj* was the only well-lit space on the ground floor. B. S. still recalls the moment when “[...] little calves were ready to be sold. They had been forced to move out of the dark stable. They could not bear the light, they were not accustomed to such intense light, so they bellowed very loudly and jumped like crazy”. The ground floor was usu-

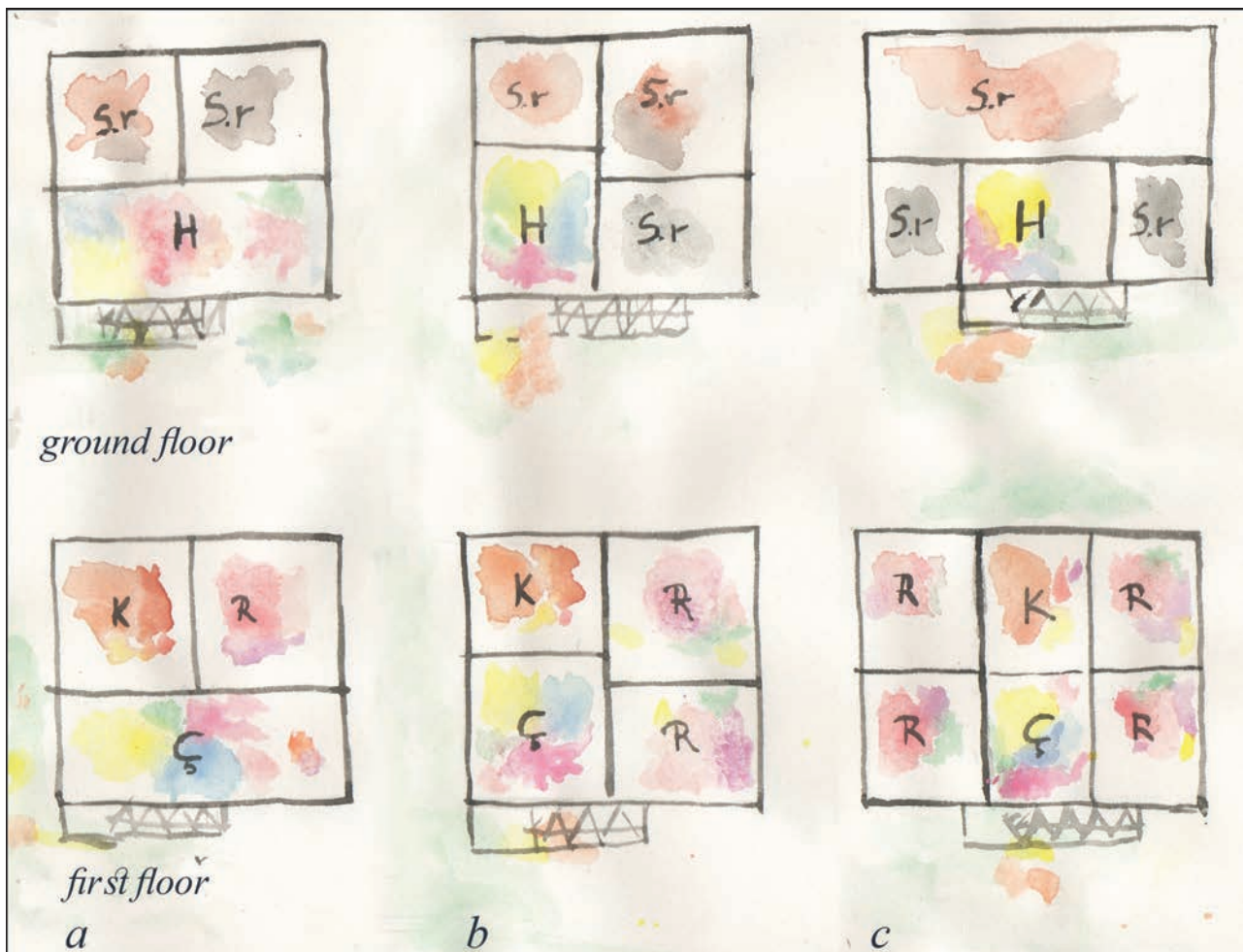


Figure 7: The main functional entities of the traditional house in Tetovo and their distribution on the ground and first floors. The hajata (H) and çardak (Ç) and their disposition: a) at the front of the house; b) in one of the house's corners; c) centrally positioned; K – kitchen, S.r. – storage room, R – room. The mix of various colours shows the multitude of activities and needs performed in each spatial entity: green – maintaining flowers/plants; red – cooking, pink – eating; yellow – playing; blue – working; grey – storage.

ally made of stone and rubble, meaning the spaces had very small openings, whereas the houses on steep terrain could only afford openings at the front or receive light through the hajata itself. The spaces were mainly used for storage; hence less effort was invested in their experiential qualities. For example, F. S. was confused and could not clearly remember whether the entrance to the storage rooms was via stairs or on the same level as the hajata: “I don't have a clear picture, I rarely went there, I don't have any memory there, really”.

A pair of straight wooden stairs with wooden handrails, sometimes positioned in the hajata or outside the main corpus of the house – the çardak (Figure 7, Figure 8). The çardak is a large open veranda and, just like hajata for the ground floor, it represents

the first floor but is also the most favoured place in the house “[...] we stayed there, we ate there, we received guests there, we even slept in the çardak during summer”, recalled B. B. with enthusiasm. The doors of the rooms all faced the çardak, thus it was differentiated with several platforms to distinguish the space for communication only and the one for leisure, eating and sleeping but also to create storage spaces. The communication hall was the lowest one, whereas a platform called *qyshk* was raised by a few stairs. The depth of the *qyshk* was utilised for wheat storage and was sometimes further differentiated depending on its position to ensure the best views of the garden or street. The handmade and decorated cushions and carpets covering the floors, the wooden carved handrails surrounding its perimeter, also the flowers hanging down from the



Figure 8: An example of the *çardak* and the *qyshk* in a traditional house in Tetovo: a) A traditional house in Poroj, Tetovo (personal archives of the respondents); b) The *qyshk* in the *çardak* (personal archives of the respondents); c) A traditional house in Janchishte, Tetovo (Photo: Aurora Saidi).

wooden beams of the ceiling, contributed to recalling the *çardak* as the place in the house where the most impressive events took place. F. O recalled that “the eldest men almost always sat in *çardak* during the day. In this way, they could observe what was going on in the garden, but also take care of and be with nephews who were playing there”. Sh. S. re-

membered the *çardak* on wedding and celebration days, “a large group of young people, all happy and cheerful, sitting in the *çardak*, laughing loudly and singing until very late”. In contrast, H. A. recalled the *çardak* from a totally different perspective: “The floor was with planks on wooden beams, but they were not perfectly arranged. From place to place, there were some tiny holes where we used to bend down and observe what was going on downstairs in the *hajaj*. We used to stay like that for quite some time until our backs hurt [...]. Other times, we used to wear traditional grownups’ wooden shoes and jump on the planks to create different rhythms. I still recall it and find it quite interesting”. In addition, M. Xh. and N. S. mention that when as children the wheat depot in the *qyshk* was their favourite spot for jumping and diving.

From the *çardak*, the path continues to another important entity in the house: the kitchen (Figure 7). In some houses, one of the rooms has been adapted as a kitchen while in others it was an extension of the wide corridor, thereby representing an access hall for the lateral rooms at the same time. The fireplace was positioned in one of its corners. It was a simple raised platform of one row of stones without a chimney, while for better ventilation the wooden beams were left uncovered by wooden planks. Still, there were very rare cases where the fireplace was in the form of a huge stone oven and chimney. Further, in the kitchen, all the cooking dishes were arranged on very simple shelves. Through a door, the kitchen was connected with the backyard but also with the water source. There were no sinks inside, with H. Q. stating “We used to wash the dishes near the water source outside the house, and put them aside on stone slates while taking care not to pollute it. The used water was poured outside the channel because the entire neighbourhood was supplied with water from the same source”.

The description of the path running from the front yard through the house to the backyard implies that **the vital spatial entities are aligned along the house’s main path of movement since it affords greater possibilities for encounter and interaction** (Subtheme 3, Table 1, Figure 4, Figure 9, Figure 10). In addition, the above descriptions of the *çardak* clearly show that **the main entity of the house holds a strategic position relative to the house’s main path of movement, to the other less integrated entities of the house and to outside (views, fresh air, distant contacts with people)** (Subtheme 4, Table 1, Figure 4, Figure 9, Figure 10). Simultaneously, it may be implied that **the main entity in the house is distinguished by specific physical properties like size, decoration, material etc. and may also be differentiated with**

many sub-entities that afford multiple activities for various needs of the inhabitants (Subtheme 5, Table 1, Figure 4).

The rooms were not less important. On the contrary, due to the openness of the movement through the house, the entire functional and socio-cultural living in the traditional house in Tetovo was moved within the walls of the rooms in colder weather conditions, especially in the “big” or “guest” room as the respondents used to call it. In contemporary terms, it actually represents the living room. “*We spent the whole day in the çardak. In the çardak during summer, while in the big room (odë e madhe) during winter*”, stated N. S. The rooms were spacious and with flexible, sparse furnishing. Apart from the stove in one corner and the built-in wall closets, cupboards and niches, the rest of the room was left free to accommodate daytime leisure, eating and night-time sleep. The room adaptation process may seem tedious and difficult, but the respondents’ descriptions imply that it was designed to be quite easily handled. The low cushioned pillows for sitting and the low round table for eating were easily removable, while the in-wall closets and cupboards (*musandra* – Figure 11 a) provided sufficient space for bedclothes and dishes in one of the walls next to the shower cabin (*amamamxhik*) in each room. Moreover, each functional entity in the rooms was carefully decorated as well. To satisfy their aesthetic needs and also to show their status and competence, the woven rugs and embroidered cushioned pillows had wonderful colourful pattern compositions, the wooden doors of the *musandra*, the covers of the windows and ceilings were masterfully decorated with floral and geometric carvings (Figure 11 c, 11 d), whereas on the other side the window parapets and stone wall niches were reserved for flowers and rare decorations. Like any other spatial entity in the house, the room design and configuration of its sub-entities were also perfectly arranged to optimally fulfil the various needs of the individual inhabitants.

All of the respondents’ descriptions generally together with the few respondents’ quotes presented in this paper emphasise that the social life in the house was very important and a valued quality. It was even explicitly stated that people ‘from before’ were more inclined to socialise, they even sacrificed their personal interest for the common well-being and, despite the various difficult conditions they faced, succeeded to be happier than the average person today: “*[...] they were different times, we had a great time together, people are very isolated now*”. The importance of social life in the house is also evident from the house’s overall configuration. The strategic position of the house’s main socio-cultural nodes concerning the best views, air

circulation and ventilation, light and shade, degree of decoration etc., but also the presence of many small doors (*kapixhik*) in the garden for easier contact with the neighbours, as well as several access options for the house and even the rooms indicate that: **the lively social life in the house is supported by the establishment of several opportunities for interconnectedness between the spatial entities as a whole, even when inhabitants’ private interests might be threatened.** (Subtheme 6, Table 1, Figure 4, Figure 9).

In addition to the lively public life, the house provided remarkable intimate places. The width of the parapet of the window, determined by the materials available and the construction solutions, was imbued with secondary functions as a place to sit, work, develop creative skills, or even enhance the aesthetic dimension of the room. The same thing happened with the *qyshk* in the *çardak*. It was intended to be a storage space, although its height and depth were used as sitting places offering rare views and a little nook for children to play in. Similarly, the sounds incidentally generated by walking with wooden traditional shoes on the wooden planks prompted a desire for children to play and saw them engage in the process of generating various rhythms (Figure 12). The experience of the house is conditioned by the way people perceive the built environment, but also by its physical properties. In explaining Gibson’s theory of affordance as an approach to environmental perception, Gifford (2014, 30) stressed that “[...] we, the users of the built environment do not see form and shape when we see a place; instead, we perceive affordances – what the place can do for us”. Hence the physical properties of the window parapet – like height and width – were apparently associated with an inviting place for sitting. Therefore, another quality of the traditional house in Tetovo is that it possessed **imperative technical and functional solutions that afford possibilities to create meaningful places** (Subtheme 7, Table 1, Figure 4, Figure 12).

The traditional houses in Tetovo were generally similar. However, when the respondents recalled the features of the traditional houses they had encountered, the characteristics of the houses that seemed to be rare or novel to them were discerned with particular emphasis. “*Our house was one of the largest in the country. Only we had a stone fireplace with an oven and a chimney*”, recalls F.S. S.H.S. remembers the ceiling of her friend’s house that was more ornamented than she was used to seeing, or the texture of window shutters that were not common in her cousin’s house. “[...] they were very simple from the outside, but very densely packed with wooden cudgel inside”. Further, B. I. enthusiastically described the first time she saw a hand-washing basin inside the house of an inhabitant

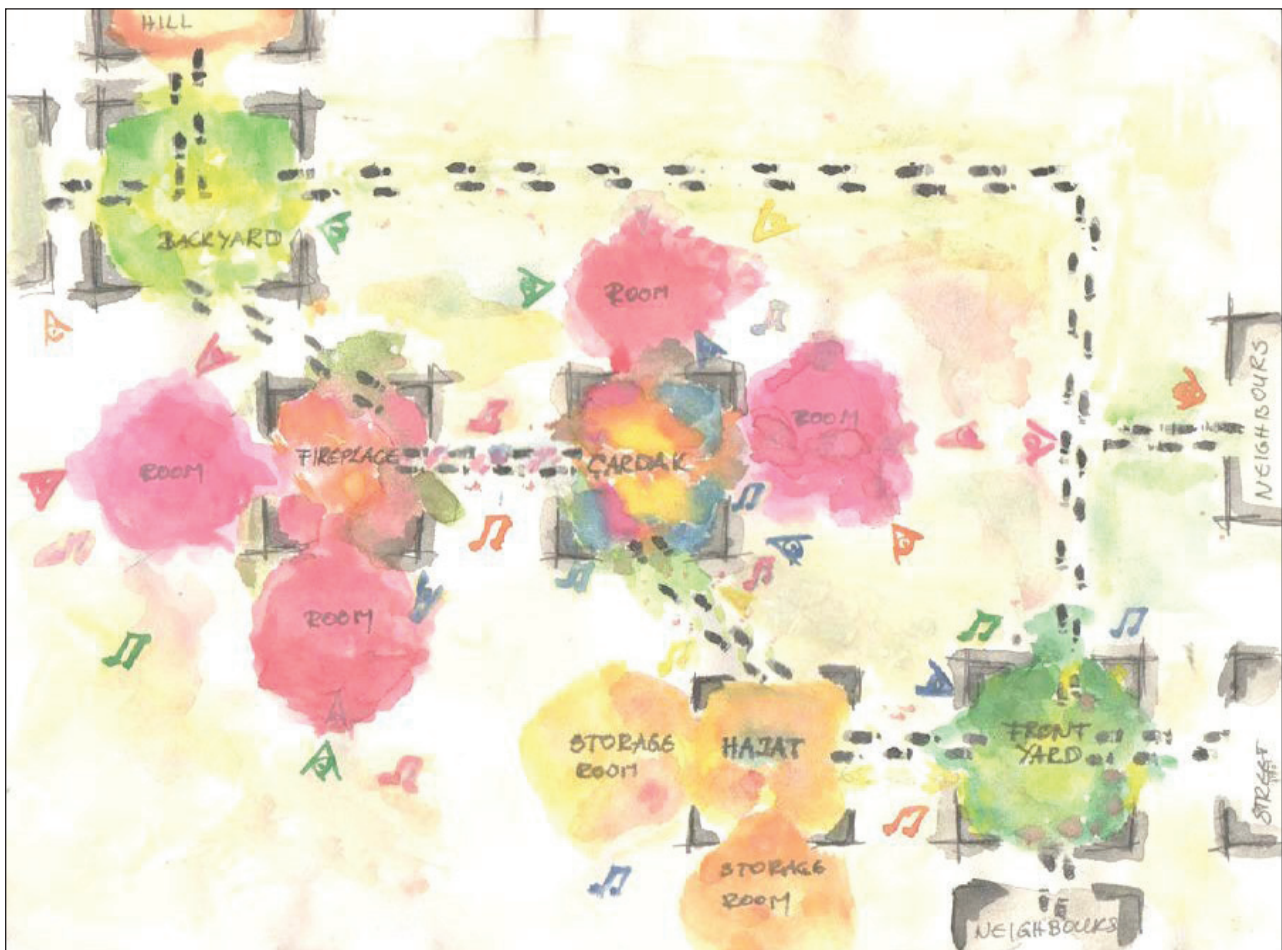


Figure 9: The sketch is an attempt to capture a mental image generated during the respondents' descriptions of the experiential qualities of the traditional house in Tetovo. It depicts the physical, visual and acoustic interconnectedness of the front yard, the house's spatial entities, the backyard/neighbourhood and indoors/outdoors; as well as the encountering of various spatial entities and the multitude of activities and needs performed in each spatial entity during the journey from the front yard through the house to the backyard. Each colour indicates an activity (e.g. red – sleeping; green – gardening; yellow – working; blue – sitting etc.), whereas the mix of colours shows the performance of many activities within a spatial entity.

who used to work as an alternative dentist practitioner as well as the use of the hazat also as an entry passage for the adjacent house. Novelty, along with incongruity, complexity and surprisingness, are characteristics of the built environment that keeps the perceiver from being engaged with the built environment, to further explore it and generate various emotional responses. Berlyne labels these characteristics collative properties (Gifford, 2014, 30). Yet, the need for novelty is also a cognitive need. Mallgrave (2010) explains it as the brain's biological need to generate new schemas for more effective responses to future challenges. Therefore, they have not been remembered in vain. It is because **the house kept the inhabitants engaged through its novel and rare characteristics compared to other houses of the same period** (Subtheme 8, Table 1, Figure 4).

Among other things, the respondents have a standard in mind regarding the appropriate and adequate size of the spatial entities or the house itself. "The old houses were spacious, we had abundant space. The rooms were huge", recalled B. I. Confirming the same, H. B. noted that "the guest room was 5 m wide and 5 m long, the kitchen too. I remember that because I needed to know the size to make rugs". Even though the definition of what is large and small is determined by comparing them with other traditional or contemporary houses, the respondents believed that the traditional house in Tetovo, considering the great number of residents living in one household, had **spacious spatial entities that fulfilled the inhabitants' various needs** (Subtheme 9, Table 1, Figure 4). Besides the spaciousness, the respondents constantly compared the traditional house in Tetovo with con-



Figure 10: The sketch is an attempt to capture a mental image generated during the respondents' descriptions of the experiential qualities of the traditional house in Tetovo. It intends to show that the experiential qualities of any house generally are generated along the paths that cross the house while encountering various spatial entities that afford the manifestation of various activities and needs. Each cluster of colours represents a spatial entity and the colour mixture shows the multitude of activities and needs carried out in each of them. Depending on the individual's needs and the socio-cultural context, the scheme can be translated to cover various house shapes and configurations.

temporary ones to emphasise that the former did not possess the same conditions as the latter regarding the quality of the building and materials, thermic and acoustic insulation, inventory, technology etc. However, at the same time, the respondents did this to imply that, **despite its unsophisticated technical conditions, the experience of the house upon moving through it unfolds multiple sensations and meanings via materials, textures, the play of light and shadow, smells, dynamic paths of movements, fresh air, social encounters etc., generating an incredible overall atmosphere (Subtheme 10, Table 1, Figure 4).**

The qualitative approach to the study of inhabitants' memorable impressions of the traditional house in Tetovo revealed important information for some of its typologies and their physical as well as functional characteristics, yet also established the traditional

house as the backbone for many events with psychological and socio-cultural significance. The definition of the house as the physical embodiment of people's various needs have been implied by many architects and writers, including Baak (2009), Zumthor (2006), Holl, Pallasmaa & Pérez (1994), Jung (1963), Bachelard (1969), Aalto (cited in Jormakka et al., 2014), and the Greek regionalists mentioned above etc. Nevertheless, the developed themes and subthemes, apart from being in line with their observations, also show how the needs of individuals or groups from a real socio-cultural setting were translated into the house's spatial configuration and how this generated admirable experience as a whole. In addition, this research has sought to stress that the dynamic and picturesque ambiances of the traditional house in Tetovo, and most probably in Macedonia generally,



Figure 11: An illustration of the interior of a traditional house in Tetovo. The house of Mehmet Palloshi, Tetovo: a) musandra – in-wall closets and cupboards; b) windows; c) decorated ceiling; d) decorated doors (retrieved from Kiprianovski & Trajkoska, 2007).

which previous researchers have praised as the main quality, are from the perspective of the inhabitants meaningful for other reasons too. They generate valuable spaces for everyday activities as well as places for socio-cultural encounters. More precisely, Grabrijan's plastic path is a result of shaping the space, using optimally the configuration of the terrain, the materials available and the building technology in order to best accommodate the everyday patterns of behaviour determined by the socio-cultural way of inhabiting the house.

CONCLUSION

The traditional house in Tetovo and Macedonia is praised for many qualities, predominantly related to its spatial configuration and physical properties. However, the findings of this research indicate that,

for the inhabitants, the qualities of the traditional house in Tetovo extend beyond its physical structure. The spatial configuration of the house and its physical properties are meaningful qualities only when they serve well the psychological and socio-cultural needs of its inhabitants. This means the experiential qualities of the traditional house in Tetovo are manifested through the affordances the physical entities of the house and their interrelation provide to meet the psychological and socio-cultural needs of its inhabitants.

The experiential qualities of the traditional house in Tetovo were extracted from the memorable impressions of its dwellers. In-depth interviews were used to collect the inhabitants' memorable impressions, while qualitative content analysis was relied on as a method to analyse and interpret the latent and manifest meanings of their content. The extracted meanings, interpreted as themes and subthemes, are



Figure 12: A traditional house in Janchishte, Tetovo: a) the wide parapet of a window; b) the floor with wooden planks and beams above the hajat (Photo: Aurora Saidi).

presented through general descriptions, illustrated through sketches and complemented by respondents' quotes and relevant explanations from other disciplines like psychology, sociology and neuroscience. They therefore provide a thorough understanding of the qualities of the traditional house in Tetovo, how they are manifested in its spatial configuration, in what context they emerged, and why they are meaningful to the inhabitants. The extensive elaboration seeks to raise awareness of the broader context in which the experiential qualities of the traditional house in Tetovo emerged in order to be more sensitive while choosing which qualities to recreate and how to adapt them to the contemporary way of inhabiting the house. It should also be noted that, alongside the experiential qualities presented in this paper, the traditional house in Tetovo may also be imbued with other qualities. The experiences of other interviewees/inhabitants could reveal other aspects of its experiential qualities. The methodology employed and the findings of this study may serve as guidelines for further research. Further, the same methodology may be used to explore the experiential qualities of traditional houses in other cities in and outside North Macedonia and to compare their qualities.

Moreover, apart from providing insight into the experiential qualities of the traditional house in Tetovo from the dwellers' perspective, the research

points out that the memorable impressions of the traditional house in Tetovo are significantly compressed information concerning its experiential qualities. The experiential qualities of any building or built environment generally could be extracted from the memorable impressions of its users, especially to assess which qualities are worth preserving or should be recreated and adapted to the contemporary way of living. The memorable impressions about a building/place are not only important for understanding how an existing setting is experienced as they play a significant role in the processes of thinking and decision-making and the experience of future developments. Therefore, learning to understand people's memorable impressions of the built environment, particularly for architects, means knowing how to understand their mental images, which have a profound impact on the way they generally think about, behave in and experience the built environment. The qualitative methods employed in this research have proved reliable in understanding the memorable impressions of people, although in-depth interviews as a qualitative method for data collection and qualitative content analysis for the analysis and interpretation of their contents can be used in any research to understand how people experience the built environment.

BIVALNE IZKUŠNJE KOT POMEMBNI OPISOVALCI LASTNOSTI HIŠE: RAZISKOVANJE IZKUSTVENIH LASTNOSTI TRADICIONALNE HIŠE V TETOVU

Aurora SAIDI

Univerza v Ljubljani, Fakulteta za arhitekturo, Zoisova 12, 1000 Ljubljana, Slovenija
e-mail: aurora.saidi@unite.edu.mk

Matija SVETINA

Univerza v Ljubljani, Filozofska fakulteta, Oddelek za psihologijo, Aškerčeva 2, 1000 Ljubljana, Slovenija
e-mail: m.svetina@ff.uni-lj.si

Tadeja ZUPANČIČ

Univerza v Ljubljani, Fakulteta za arhitekturo, Zoisova 12, 1000 Ljubljana, Slovenija
e-mail: tadeja.zupancic@fa.uni-lj.si

POVZETEK

Tradicionalne hiše v Severni Makedoniji na splošno in zlasti v Tetovu so bile že obsežno proučevane, vendar je o bivalnih lastnostih tradicionalne hiše, kot jih zaznavajo njeni prebivalci, malo znanega. Ker je danes v Tetovu težko najti tradicionalno hišo v bivalnem stanju, smo raziskali njene izkustvene lastnosti z uporabo spominskih vtisov prebivalcev kot pomembnih izkustvenih opisnikov lastnosti hiše in bivalnega prostora. S kvalitativnim pristopom smo s pomočjo poglobljenih intervjujev med uporabniki, ki so nekoč živeli v tradicionalnih hišah, zbrali podatke vedenjske, socialne in čustvene narave glede bivalnega okolja, npr. spomine na socialne dogodke in drugo dogajanje v tradicionalnih hišah, navade in rutine povezane s posameznimi prostori v kontekstu vsakodnevnega življenja in posebnih priložnosti itd. Podatke smo obdelali z eno od tehnik analize kvalitativnih podatkov, rezultati pa kažejo, da so izkustvene lastnosti tradicionalne hiše v Tetovu tesno povezane s tem, kako prostorske lastnosti hiše kot celote izpolnjujejo različne psihološke in družbeno-kulturne potrebe prebivalcev. Rezultati nakazujejo, da je posameznikova spominska izkušnja prostora (hiše in okoliša) povezana z načinom, s katerim posameznik zaznava tudi svoje trenutno bivanjsko okolje in željami glede ureditve bivanjskega okolja v prihodnosti. V članku smo s pomočjo nekdanjih uporabnikov prostorov skušali dobiti ne le vpogled v etnološke posebnosti življenja v tradicionalnih hišah v Tetovu, temveč tudi globlji vpogled v povezave med arhitekturnimi, socialnimi in psihološkimi elementi prostora in njegove uporabe.

Ključne besede: spomin, arhitektura, analiza kakovostne vsebine, tradicionalna hiša, Tetovo

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JOSEPHI SCHNEIDER „CARMINUM LIBRI OCTO”
LA MORS, COMPONENTE ESSENZIALE DELL'ESPRESSIONE POETICA
DI JOSEPH SCHNEIDER

Nada BULIĆ

Università degli studi di Zara, Via M. Pavlinović 1, 23000 Zara, Croazia
e-mail: nbulic@unizd.hr

Ante MATAN

Università degli studi J. Dobrila di Pola, Facoltà di lettere e filosofia, Via I. M. Ronjgov 1, 52100 Pula-Pola, Croazia
e-mail: ante.matan@unipu.hr

SINTESI

Il presente saggio elabora la raccolta di liriche “Carminum libri octo” del teologo Joseph Schneider con particolare riferimento al motivo della morte, componente essenziale della sua opera poetica. La raccolta viene analizzata sia dall’aspetto versificatorio sia da quello tematico; l’immagine della morte, così com’è raffigurata dal poeta. Il rapporto che ne risulta, dimostra che essa, mors, è la chiave per decodificare la sua visione del mondo e la sua identità poetica.

Parole chiave: Joseph Schneider, *Carminum libri octo*, poetica, morte, versificazione

JOSEPHI SCHNEIDER „CARMINUM LIBRI OCTO”
THE MORS, ESSENTIAL COMPONENT OF JOSEPH SCHNEIDER’S POETIC EXPRESSION

ABSTRACT

In this article the authors offer an elaboration of the lyric collection “Carminum libri octo,” written by theologian Joseph Schneider, with particular reference to the theme of death, an essential component of his poetic oeuvre. The collection is analyzed both from the aspect of versification and from the aspect of theme; the image of death, as refigured by the poet. The resulting article demonstrates that this, death, is the key to decoding his vision of the world and his poetic identity.

Keywords: Joseph Schneider, *Carminum libri octo*, poetics, death, versification

INTRODUZIONE

Preposito del capitolo triestino, nel 1878 Joseph Schneider pubblicò a Trieste la raccolta intitolata „Carminum libri octo“ (Carmi in otto libri). Lo fece come autore ma anche come editore (*edidit*) nella tipografia „Typ. Balestra et Soc.“, quasi certamente a proprie spese, e con un nobile fine dato che sin dal frontespizio dichiarava che i proventi sarebbero andati alle orfanelle (*puellis orphanis*), ribadendolo poi nella prefazione: *...poscunt alimenta puellae/ Quarum sunt rapti crudeli morte parentes!*

Visto che Schneider è relativamente poco noto al di fuori della ristretta cerchia di edotti che si occupano di questioni ecclesiastiche specifiche, non desta soverchia meraviglia se della sua unica opera letteraria che si conosca sia stata a malapena registrata l'esistenza; invece ad alcuni suoi scritti apologetici con traduzioni tedesche e slovene, o anche con seconde edizioni (Simčič, 2010, 74), è comunque andata meglio.

La raccolta di canti di cui qui ci occupiamo è di recente disponibile in rete; al contrario, gli esemplari a stampa, per quanto ne sanno gli autori¹, sono molto rari. Sebbene una volta pubblicata la raccolta sia stata, al pari di ogni opera d'arte, esposta – come dice Sloterdijk – „al rischio della visibilità“ (Sloterdijk, 1992, 5), quindi all'analisi critica e interpretativa, essa è tuttavia rimasta in disparte. Con questo contributo cercheremo di rendere merito all'aspetto letterario dell'opera schneideriana.

SULL'AUTORE

Joseph Schneider nacque a Trieste nel 1812 e nella città natale morì nel 1884. A quel tempo Trieste fu luogo di incontro di lingue, culture, religioni e popoli diversi, il che si rifletté anche nella vita e nell'opera di codesto eminente chierico². Dopo aver frequentato il seminario di Gorizia fu diacono a Vienna, e nel 1835 venne ordinato sacerdote dal vescovo di Trieste e Capodistria Ravnikar. Va senz'altro ricordato che dal 1834 al 1839 frequentò l'*Augustineum*, cioè il *Frintaneum*, allora famoso istituto scolastico triestino, dove sostenne gli esami

di *rigorosa* in biblistica, di storia della chiesa e diritto ecclesiastico, di teologia morale e pastorale e di dogmatica. In seguito si stabilì a Salisburgo, nel cui Liceo insegnò storia della Chiesa e diritto e dove nel 1840 si addottorò in teologia. A Salisburgo visse per nove anni e dal 1842 al 1848 vi ricoprì l'incarico di decano della Facoltà di teologia. Al suo rientro a Trieste ebbe il titolo di canonico – scolastico della cattedrale di S. Giusto; successivamente divenne docente nel Seminario della città, nel quale insegnò catechesi, omiletica e esegesi biblica. Nel 1864 fu nominato preposito capitolino e presidente del tribunale ecclesiastico diocesano. Alla morte del vescovo Legat assunse, in qualità di vicario capitolino, la gestione della diocesi fino all'insediamento del nuovo vescovo Juraj Dobrila³.

Nei suoi testi Schneider ha trattato del neoassolutismo e dei suoi influssi, tracciando paragoni tra i vari principi della democrazia liberale, occupandosi altresì di rivoluzioni, irredentismo e soggettivismo morale. Ha fatto parte dell'„Accademia Romana Religionis Catholicae“, dell'„Accademia Roboretana degli Agiati“ e dell'„Associazione agricola goriziana“. I suoi lavori furono in prevalenza pubblicati dalla stampa religiosa del tempo; ha collaborato anche con Janez Pogačar che nel 1848 pubblicò i suoi articoli nel „Laibacher Kirchenzeitung“; molti contributi gli furono inoltre stampati nel „Folium diocesanum“ di Trieste nel periodo 1865–1875.

Dei suoi saggi teologici sono notevoli *Eusebia ovvero Trattenimento incessante dell'anima con Dio*, Trieste, Coen, 1856, con le relative traduzioni: *Eusebia oder die Weihe des Gebetes*, Trieste, 1856, e *Euzebija ali posvečba molitve*, Lubiana, 1854; poi *Virginia ossia Considerazioni divote sulla parabola delle dieci vergini*, Trieste, Hermanttorfer, 1861 (II ediz. 1865) e *Teotimo ossia Trattenimento spirituale tra l'anima e Dio*, Trieste, Lloyd, 1855.

CARMINUM LIBRI OCTO

La prefazione alla raccolta, datata 4 agosto 1878, consta di venticinque esametri. L'opera è suddivisa in otto unità – libri, che si estendono su 468 pagine. Le poesie o „odi“, come le definisce l'autore, in tutto

1 La ricerca in rete nei cataloghi delle biblioteche mondiali annovera un esemplare a Lugano e uno a Augsburg (https://www.worldcat.org/title/josephi-schneider-carminum-libri-octo/oclc/&referer=brief_results), due a Trento (https://www.worldcat.org/title/carminum-libri-octo/oclc/797682082&referer=brief_results), inoltre due a Madrid e due a Montreal, e addirittura sei negli USA (https://www.worldcat.org/title/carminum-libri-octo/oclc/80627291&referer=brief_results), dei quali quello della biblioteca del Harvard College è digitalmente accessibile. Per quanto riguarda quest'ultimo, prestare attenzione al fatto che ha quasi duecento pagine in più, dato che determinate parti si ripetono.

2 „To velja seveda še posebej za Trst in njegovo okolico, kjer se že od srednjega veka zelo tesno križajo tokovi slovanske, romanske in germanske kulture in kjer se dogaja svojevrsten stik evropskega zahoda z vzhodom in severa z jugom. Zato tudi ni naključje, da se je v kozmopolitskem mestu, kakršen je bil v preteklosti Trst, na tem stičišču različnih jezikov, kultur, religij in narodov, med katerimi sta italijanski in slovenski avtohtona, razvila pomembna italijanska pa tudi slovenska književnost. Književnost kot izraz posebnih družbenih razmer, nacionalnih trenj pa tudi eksistencialnih napetosti in iskanja identitete, tako tipičnih za življenje ob meji,“ (Pirjevec, 2011, 354).

3 Per ulteriori informazioni sulla biografia di Schneider v. Simčič (2010, 73–74).



Immagine 1: Ritratto del preposito Schneider, conservato presso la sala del Capitolo di S. Giusto, Trieste (per gentile concessione dell'Ufficio Beni culturali della Diocesi di Trieste).
Figure 1: The portrait of provost Schneider, kept in the hall of the Chapter of St. Giusto, Trieste (courtesy of the Ufficio Beni culturali della Diocesi di Trieste).

130⁴, occupano i primi cinque libri, nel sesto e settimo trovano spazio gli „idilli“ in esametri, mentre l'ottavo libro contiene i distici elegiaci di due epistole e due elegie e due componimenti d'occasione in onore di papa Pio IX e del vescovo Jernej Legat.

La versificazione di Schneider si avvale delle forme metriche più varie, cosicché 49 odi sono svolte in strofe saffiche, 30 nell'asclepiadeo II, 21 sono versificate in strofe alcaiche, 13 in archilochee I, 6 in distici elegiaci, 2 rispettivamente in dimetri giambici (*car.* 1, 19; 2, 9), in epodi giambici (*car.* 1, 4; 2, 1), in epodi datti-

lico-giambici I (*car.* 1, 2; 3, 10) e ipponattei (*car.* 3, 1; 3, 11), mentre vi sono ancora un'ode in strofa archilochea II (*car.* 1, 23) e una nella asclepiadea III (*car.* 5, 15). La poesia intitolata „Virtus“ è in distici che creano un asclepiadeo minore e un gliconeo.

In merito all'uso della metrica lirica va detto che l'autore dimostra la sua indubbia conoscenza dei modelli classici, specie di Orazio, e, per quanto riguarda i temi svolti nell'ambito di quelle forme metriche, comprova le sue competenze teologiche. Fra detti temi figurano la morte (*Mors*, *car.* 2, 11;

4 Nel primo libro ve ne sono 25, nel secondo 26, nel terzo 25, nel quarto e quinto 27 in ognuno.

2, 26; 3, 6; 4, 15; 4, 16; 4, 17; 4, 18; 5, 4), il Cielo (*Coelum, carm.* 1, 17; 2, 10; 2, 23; 3, 7; 5, 14; 5, 21), la croce (*Crux, carm.* 1, 23; 2, 22; 3, 14), la castità (*Castitas, carm.* 1, 6; 2, 3; 2, 12), la Chiesa (*carm.* 1, 3; 5, 24), la lira (*carm.* 1, 2), l'eucaristia, il peccato, il tempo, il camposanto, i peccatori, i tempi difficili, il pentimento, il martirio, il sacrificio e altri. Parte delle liriche è dedicata alla Beata Vergine Maria (*carm.* 1, 4; 1, 7; 2, 13; 3, 20) o ad altri personaggi (S. Ignazio, S. Angela Merici, l'infedele Crispo, S. Giusto, il Buon Pastore, S. Giovanni Battista, Milvio, „il cieco che ha acquistato la vista“, la vergine Nike).

L'ode dedicata a papa Pio IX venne scritta in occasione del 50.esimo anniversario del suo sacerdozio e quella in omaggio al vescovo di Trieste e Capodistria Jernej (Bartolomeo) Legat per il 25.esimo della sua ordinazione episcopale. Ne scrisse una anche in occasione della dipartita di quest'ultimo, sebbene il titolo indichi solamente *Episcopo Tergestino et Iustinopolitano Bartholomaeo Legat*. Lo stesso caso vale per due successive epistole, anch'esse inviate a Legat. La raccolta termina con due elegie intitolate „Genius aevi“ (Lo spirito del tempo) e „Omnia caduca“ (Tutto è caduco).

Già da questa rassegna sono evidenti la varietà della versificazione⁵ e, in senso contenutistico, la coerenza motivico-tematica che si esplicita in un corpo intrinsecamente conchiuso. La forte coesione tematica soverchia gli altri parametri letterari quando riferiti alle dimensioni compositive, motivo per cui le liriche, ancorché parecchie rechino persino lo stesso titolo, non sono formalmente riunite in cicli⁶. Prevalgono per numero quelle al cui centro c'è la morte intesa come forza dominante, elementare, che il poeta con variazioni e reiterazioni del motivo estende all'opera nel suo complesso. In questo lavoro si analizzano perciò la raffigurazione che il poeta ci dà della *mors* e il rapporto nei suoi confronti, dove la *mors* si rivela la determinante poetica essenziale della sua creazio-

ne, un etimo spirituale come dice Spitzer (Frangéš, 1986, 23–49), nutrito dalla sua matrice identitaria cristiana. In quanto esperienza umana universale, la *Mors* presenta pure un riconoscibile significato universale (Iser, 2000, *passim*), ciò che consente al testo artistico di comunicare con il mondo esterno, e questa comunicazione avviene, secondo Lotman, attraverso la semantica universale (Lotman, 2001, *passim*).

MORS ADEST

Rimanendo negli ambiti di una visione cristiana del mondo, evidente già dai cenni bio-bibliografici, nelle sue poesie Schneider struttura il mondo come un insieme monolitico, in cui ogni singolo destino, esemplificato sulle biografie dei santi, sottostà a una medesima ragione e, considerato attraverso il prisma della critica archetipica di Durand, si fa specchio dell'immagine archetipica dell'angelo ribelle, dell'uomo traviato e della via della redenzione (Durand, 1991, 117–120). In un siffatto ordine i destini individuali non conducono alla dissoluzione dell'insieme né alla scomparsa dell'unità di senso, bensì sulla spinta del monolitismo strutturale occupano il proprio posto di elemento materiale ma effimero nell'area della sofferenza e dell'aspettativa di eternità. Qui il mondo del poeta, trovando in parte un punto di riferimento pure nel concetto platonico di soma-sema⁷, non rispecchia lo storico-eventuale; il suo orizzonte autoriale è stabilito dal motivo della generica esperienza della vita umana, in cui il personale-esperienziale è scevro di individualità, astratto e ridotto a due momenti esperienziali universali: la fenomenologia umana nell'esistenza e la morte esistenziale⁸. All'interno di questo orizzonte viene a crearsi il quadro mentale di un mondo gerarchicamente ben strutturato,⁹ nel quale l'uomo, determinato dalla nascita, viene scagliato in un'esistenza transeunte e messo a confronto con la grande e inesorabile *mors*.

5 Gli autori trattano dei modelli versificatori nella poesia di Joseph Schneider in un lavoro che sarà pubblicato a parte.

6 Sui problemi inerenti alla lunghezza delle opere vedi Užarević, 1991, e Užarević, 2012.

7 Il concetto per cui il corpo è la tomba dell'anima viene elaborato nei dialoghi *Fedro* e *Cratilo*, concisamente esposto in: “Socr.: In molti modi, mi pare invero; e se lo si altera pure un po', anche in moltissimi. [c] Infatti alcuni dicono che esso sia *sèma* (tomba [ma anche: segno]) dell'anima, come sepolta in esso nella vita presente; e per il fatto che la *psychè* a sua volta *semàinei* (significa) ciò che *semàine* (significi), anche per questo aspetto si chiama correttamente *sèma*. Tuttavia mi paiono in primo luogo i seguaci di Orfeo coloro che posero questo nome, come se l'anima, nello scontare la pena per ciò per cui appunto paga, abbia, affinché *sòzetai* (si salvi, sia protetta), questo rivestimento a immagine di prigionia: dell'anima questo è dunque, come è esso stesso nominato, *sòma* (custodia), finché non estingua i debiti. E non si deve cambiare nemmeno una lettera,” (Minio-Paluello et al., 2003, 23). “Ogni anima è immortale. Infatti, ciò che sempre si muove è immortale, mentre ciò che muove altro ed è mosso da altro, quando ha cessazione di movimento ha cessazione anche di vita. Dunque, solamente ciò che muove se stesso non cessa mai di muoversi, in quanto non lascia mai se stesso, anzi è fonte e principio di movimento anche per le altre cose che si muovono” (Reale, 2018, 105). “Tutti coloro i quali per diritto modo si occupano di filosofia corrono il rischio che resti celato altrui il loro proprio intendimento; il quale è che di niente altro in realtà essi si curano se non di morire e di essere morti” (Gigante & Valgimigli, 2003, 140).

8 In ciò Schneider si pone su posizioni opposte a quelle del teorico della cosiddetta scuola romantica milanese Giovanni Berchet (1783–1851), suo contemporaneo ma un po' più anziano, che propugnava il distacco dai modelli classici e dal loro carattere universalmente meditativo; secondo Berchet un letterato era tenuto a prefigurare la vita considerandola attraverso un prisma sentimentale individuale.

9 *Terra ancilla hominis, servus homo Dei, / Terrae sit homo, rex hominis Deus.* (*carm.* 5, 5. *Restauratio*)

Anche se apparentemente soggetto, il poeta traccia, uguagliando l'ego e l'homo, un orizzonte universale quasi completamente esente di biografismo e autoreferenzialità,¹⁰ reggendosi saldamente su quanto ritiene sovrastorico e sovratemporale e, seppure talvolta ricorra al dato oggettivo e spaziale, lo fa per desiderio di prospettivismo. Roma, la prima ode con cui apre, non a caso, la raccolta, è qui un topos simbolico, simbolo spaziale del tempo, *urbs aeterna. Regina, magistra, caput mundi*, simbolo *stabilitatis loci* (v. Norberg-Schulz, 1979, 18–22), esaltata come sede della Chiesa cui Dio ha consegnato il mondo affinché lo governi per l'eternità:

*Urbis aeternae reverare fata...
Donec in coelo radiabit ignis
Roma regnabit. ...
At Petri Sedi sine fine totus traditur orbis.
(carm. 1, 1, Roma)*

Come tale, la Roma-Ecclesia è custode dell'immagine celeste, incessante promemoria e monito della sua eterna superiorità. In tal modo già l'ordine di successione e il contenuto delle prime liriche dimostrano, in guisa di introduzione

programmatica, il modello che l'autore ha del mondo e che si riflette nel suo sostrato poetico definendo nel contempo l'orizzonte d'attesa del lettore: *Roma, Lyra, Ecclesia, Ad beatam Virginem*. Nutrendosi alla fonte di Cristo, la lira del poeta viene dedicata, e ne è ispirata, esclusivamente ad ammaestrare dell'esistenza dell'unico Dio e della nuova alleanza: *Unumque discamus Deum...*, sotto l'ala protettrice della madre celeste e della Chiesa, cui si rivolge devoto come a una sposa: *sum tibi fidus, mea Sponsa, coniux* (carm. 1, 3, *Ecclesia*) – che è „il punto di partenza e di arrivo” (Peiç, 1995, 23) delle sue preoccupazioni¹¹. La forza della parola poetica gli è garantita ed è desunta dalla remota antichità, cui Schneider ricorre – *omnes carmina nos docent* – adottando l'antico concetto del poeta maestro delle genti, che nel suo caso corrisponde al ruolo del pastore dei popoli, però sulla scia di Virgilio¹², benché non osi chiamare se stesso *vates*¹³. Avendo assunto da Milton la tenebrosa dignità dell'immagine motivica dell'uomo traviato ma anelante – per intercessione del Cristo – al riacquisto del Cielo¹⁴, l'Autore si associa al filone dei poeti metafisici inglesi di inizio XVII secolo¹⁵, e scomponendo il raffinato tessuto classico dell'antichità lo intreccia

10 Solo eccezionalmente in tutta la raccolta si coglie qualche informazione biografica, ad es.: *non ego semper eram, nunc sexagesimus annus labitur aetatis* (carm. 4, 13. *Ex Deo sum*), ma anche allora nel contesto del „non esisto da sempre”, nel senso di *ex Deo sum*.

11 Tutta l'opera letteraria di Schneider fu ispirata dal suo fervente cattolicesimo, in ciò in parte influenzato dal più prestigioso rappresentante del romanticismo italiano (ma avulso dalla scuola milanese), Alessandro Manzoni (1785–1873), e dai suoi *Inni sacri*: „E tu, Madre, che immota vedesti/ un tal Figlio morir sulla croce,/ per noi prega, o regina de' mesti,/ che il possiamo in sua gloria veder;/ che i dolori, onde il secolo atroce/ fa de' boni più tristo l'esiglio, misti al santo patir del tuo Figlio,/ ci sian pegno d'eterno goder,” (Manzoni, *Inni sacri*, II. *La passione*, 89–96). „nel Signor chi si confida/ col Signor risorgerà,” (Manzoni, *Inni sacri*, III. *La risurrezione*, 111–112); „Il Manzoni cattolico non rinuncia alle radici illuministiche della sua formazione: la sua adesione alla fede e ai dogmi non vuol essere una passionale immersione nell'irrazionalità, né (come invece avviene per tanto cattolicesimo romantico) una negazione delle forme della civiltà moderna; vuole invece porsi addirittura come inveramento supremo della ragione illuministica, come raggiungimento di una razionalità più alta e universale, che non esclude un confronto con le forme laiche della modernità e sa interrogarsi sui limiti, gli errori, le colpe dei rappresentanti della Chiesa nel passato e nel presente,” (Ferroni, 2008, 145–146). Il cattolicesimo manzoniano, secondo Slamnig, non serba in sé alcunché di dogmatico o di crudamente dottrinale. Più che altro gli serve da percorso verso la compassione, la fratellanza e la solidarietà fra tutti i popoli e tutte le razze (Slamnig, 1999, 200). „All'innografia ambrosiana e latina guardano piuttosto gli *Inni sacri* di Manzoni, che con la loro complessità teologica e voluta durezza formale innovano radicalmente la poesia sacra (basti al riguardo confrontare *Il natale* o il drammatico frammento sul *Natale del 1833* con l'edulcorato candore della popolare canzoncina di sant'Alfonso de' Liguori «Tu scendi dalle stelle»),” (Gibellini, 2011, 18).

12 Il poeta sente di schiamazzare come un'oca al paragone con i suoi grandi precursori: *incipie, si quid habes. et me fecere poetam Pierides, sunt et mihi carmina, me quoque dicunt uatem pastores; sed non ego credulus illis. nam neque adhuc Vario videor nec dicere Cinna digna, sed argutos inter strepere anser olores.* (Verg., *bucol.* IX, 32–36.)

13 *Noli me dicere vatem.* (*Idyll.* 7, *Clara, Theresia, Francisca*; Schneider, 1878, 424).

14 Nell'ode „Sulla mattina della natività di Cristo” (*Ode on the Morning of Christ's Nativity*) John Milton (1608–1674) rimanda alla caduta dei vecchi dei, tema che Schneider articolerà chiaramente nei suoi *Idyllia* raccolti nei libri VI e VII di questa silloge.

15 Abbiamo qui usato la locuzione di Samuel Johnson (1709–1784) „*metaphysical poets*”, di cui si è valso nell'opera *Lives of the Most Eminent English Poets*, al capitolo Cowley (Johnson, 2009a, 5–54), per indicare gli appartenenti al circolo poetico la cui poesia era profondamente caratterizzata dalle speculazioni filosofiche. Il sintagma è stato adottato anche dalla critica contemporanea: „*Altre due vite furono particolarmente lunghe: 'Cowley', che coinvolgeva l'impegno di Johnson con la poesia metafisica e includeva una stretta considerazione della poesia di Donne, e 'Savage'*” (Johnson, 2009a, xi). La convinzione che una buona critica implichi l'inganno del lettore è alla base del suo trattamento della poesia metafisica in „*Cowley*”. Quando Johnson si riferisce a „*una razza di scrittori che possono essere definiti i poeti metafisici*” non stava coniato una frase, ma confermando una categoria (Johnson, 2009a, xxiv). I commenti critici di Johnson sono considerati anche oggi fra i migliori della critica letteraria in generale: „*Il commento critico in essi è ancora oggi una festa, ricca di acute e robuste intuizioni sull'inventiva e sull'originalità dei poeti e spesso sulle vicissitudini della vita che concorrevano a determinare l'immaginazione poetica e la fama*” (Johnson, 2009b, xxiv).

nuovamente al messaggio biblico, che è un procedimento comune nel genere della lirica sacra¹⁶. Dall'allusione a Virgilio emerge l'angoscia che il poeta prova verso il peso della tradizione (*the anxiety of influence*), il che precipuamente vale per il suo rapporto nei confronti dei grandi geni poetici, che, secondo Bloom, sono tutti canonici (v. Bloom, 1997, xxii–xlvi). Alla luce del monito di Donne sulla campana che suona per noi tutti¹⁷, le sue preoccupazioni pedagogiche si colgono dai numerosi esempi in cui si rivolge direttamente a un Tullio o un Tirso, nomi con i quali parla metaforicamente a un giovane qualsiasi o agli *iuvenes* in genere:

*Tulli, disce mori, praeclara scientia mortis,
Fata manent omnes, imminet atra dies.
Omnia (crede mihi), quae sunt carissima, linques.
Plurima, quae turbent, fata suprema dabunt.
(carm. 4, 15. Mors)*

Gli si rivolge in maniera intima, suggestivamente, cattura la loro fiducia (*optime Tulli, crede mihi, crede miserrimum, precor, o iuvenis!*) e li ammonisce (*memento, esto vigil*) a pensare al destino che incombe su tutti indicando la via della salvezza¹⁸. Variando il tema del biblico Libro dei profeti, *nihil est sub sole perenne* (carm. 8. *Omnia caduca, Elegia*), canta del perenne alternarsi del bene e del male, della transitorietà e sofferenza immanenti all'umanità:

*Sunt bonis eheu mala mixta semper,
Hac sumus nati genus omne sorte,
Semper et passum, partietur eheu
Semper ubique. (carm. 5, 2. Tristis)*

La puntualizzazione *omnia mors aufert* esprime rassegnazione verso il processo di decadenza, con la pressoché banale semplicità della constatazione *nascimur ut occidamus* (nasciamo per morire), che non lascia punto spazio a quasivoglia resistenza al processo in parola ed eleva la *mors* al livello di una forza pareggiante onnicomprensiva nella quale affondano ogni singola esistenza e identità¹⁹. Tramite il “death-drive” del poeta (Smith, 2010, 51), la fisicità dell'uomo è ridotta a grottesca, viene grottescamente enfatizzata dalla descrizione di cadaveri come prospettiva della vita umana, dalle nauseanti rappresentazioni di cimiteri e funerali, esequie di tutto l'essere umano. Il raccoglimento meditativo, poeticamente imitato, che approda allo spettrale e al funereo, è l'icastico quadro che emerge dai *Pensieri notturni*²⁰; l'onnipresente paura (*timor mortis*) della mano della morte (*manus mortis*) trasfusa in tremore, sudore, ansia, insonnia, e rinsaldata con *terreo, torqueor*, è l'unica costante compagna della vita, dall'inizio alla fine. Di fronte all'immagine immateriale del proprio cadavere²¹ l'uomo si trova impotente, tormentato dal minaccioso esito del giudizio estremo; vive morendo (*nunc vivo moriturus*) e cercando inutilmente²² di indovinare quando e come morrà:

16 „Al genere della lirica sacra possiamo ascrivere anche le parafrasi espansive delle preghiere, come ad esempio il *Salve Regina* riscritto nel Trecento da Giovanni Querini, lo *Stabat Mater* reinterpretato da Marino, o le celebri suppliche alla Vergine di Dante e di Petrarca, l'uno severamente teso a rendere la densità del mistero («Vergine madre, figlia del tuo Figlio...»), l'altro rapito dalla celeste bellezza di Maria («Vergine bella che di Sol vestita...»). Quanto al poema sacro, il vertice raggiunto dal genere con la *Commedia* dantesca coincide col suo declino: a dispetto della produzione anche fitta del Sei e Settecento, il genere non darà da noi frutti altissimi: e se nel Novecento meritano attenzione distese narrazioni poetiche come quelle di Giovanni Testori per la madre e la Madonna o di Mario Luzi per il viaggio terreno e celeste di Simone Martini, è solo in un italiano d'adozione qual fu Ezra Pound che possiamo trovare versi confrontabili con l'*Inferno* dantesco” (Gibellini, 2011, 18).

17 John Donne (1573–1631), predicatore e letterato, scrisse, oltre a liriche amorose per le quali va soprattutto famoso, anche poesie religiose e prosa. „Per chi suona la campana – Suona per te!”, pensiero potente, è stato diffuso al di fuori della cerchia di conoscitori della sua opera da Ernest Hemingway, che intitolò proprio così il suo romanzo più famoso.

18 *Fata memento, / Omnia destitues! Pulvis et umbra sumus!* (carm. 4, 16. *Mors*). *Te vocat, eja (precor) Carpe salutis iter, praefer mansura caducis, Rumpere miras, Tulli, te rogo, curre, vola! Nonne monet Dominus: Vigilate, estote parati?* (carm. 4, 18. *Mors*).

19 La profondità del pessimismo che lo pervade elucubrando sul destino dell'uomo e sulla sua impotenza riecheggia le delusioni del grande poeta del romanticismo italiano Giacomo Leopardi (1798–1837) e dei suoi *Canti*, benché dal naufragio della disperazione leopardiana lo preservi la luce della fede nella salvezza cui si aggrappa spasmodicamente: “Amaro e noia/ la vita, altro mai nulla; e fango è il mondo. / T'acqueta ormai. Dispera/ l'ultima volta. Al gener nostro il fato/ non donò che il morire. Ormai disprezza/ te, la natura, il brutto/ poter che, ascoso, a comun danno impera, / e l'infinita vanità del tutto. (Leopardi, *A se stesso*, *Canto XXVIII*)

20 Per questa sua caratteristica Schneider si lega alla poesia cimiteriale di Edward Young (1683–1765) e ai suoi *Night thoughts* – meditazioni sulla morte, la virtù e la fede, e all'“Elegia scritta in un cimitero di campagna” (*An Elegy Wrote in a Country Churchyard*) di Thomas Gray (1716–1771). Ma a differenza di Young, che aveva immaginato la sua opera come un invito a convertirsi rivolto a qualche ateo, con le sue raffigurazioni spettrali Schneider chiama anche i fedeli ad aderire sinceramente e con tutto il cuore al cammino verso la redenzione. L'umore elegiaco, le riflessioni sul destino dell'uomo e sull'ineluttabilità della sofferenza e della morte, l'atmosfera tenebrosa resa in ineccepibile forma svelano la sua affinità con Gray e Ugo Foscolo (1778–1827), i cui *Sepolcri* sono lo specchio dell'angoscioso stile della poesia cimiteriale.

21 *Heu video me triste cadaver: Immotus rigeo macilentus pallidus ore, Surdae aures et lumina clausa, Labra silent capitique cruce[m] dant lumina circum.* (carm. 3, 23. *Timor mortis*)

22 *Nescit homo finem, temporis ima dies, uni nota Deo!* (carm. 4, 18. *Mors*)

*Quo modo, quando moriar? Suprema
me dies terret... Me dies terret (fateor) suprema,
terrui semper, subeunt perennes
Tartari poenae...tremefio, sudo
algeo totus. (carm. 2, 11. Mors)
Terreor infelix...Torqueor infesta venientis imagine
mortis (carm. 3, 23. Timor mortis).*

La vita dell'individuo non è che un attimo (*vita est momentum*, *carm. 4, 17. Mors*), una dell'infinito numero di direzioni possibili che scaturiscono dallo stesso punto di partenza. Il loro sfacelo fornisce un'immagine frammentaria, tendente a un punto d'appoggio stabile dove la condurrà la *mors*:

*Mors est certa viae meta celerrimae (carm. 5,
6. Monita).*

Ne consegue che la gnoseologia dominante di questo ciclo è la gnoseologia della morte.

Innalzando la sua costruzione poetica sull'opposizione degli epiteti – *dulcis amaraque mors est* –, giocando con la prospettiva, descrivendola contrastivamente e antepoendo alla *mors* segni di volta in volta positivi e negativi, demonizzandola o idealizzandola, ne potenzia ulteriormente il potere e la promuove a proprio etimo spirituale, a costituente dominante della sua poetica e oltre, della vita.

Lungo il cammino della vita scopre *metuenda saevae Mortis imago (carm. 5, 10. Somnus)*, tutte le sciagure si rispecchiano nella sua terribile figura, che impugna lo scettro come una regina²³, e lei, unica, vince l'invincibile e nessuno le può sfuggire:

*Non fugas mortem, tenet una sceptrum,
Vincit invictum, iuvenem senemque. (carm. 4,
16. Mors)*

Ma la *Mors* è anche portatrice di un contrassegno positivo, spezzone e risonanza di vita, *mors echo vitae*. In quanto *ultima linea vitae*, *mors* è linea di separazione però partecipe della vita, come lo è l'uomo. Sviluppando ulteriormente questo pensiero l'autore constata: *Principium vitae non est nisi mortis origo*, il che rimanda a uno stesso punto di partenza sia della vita sia della morte: il principio di una è l'origine della

seconda, come il giro completo della circonferenza compiuto da uno stesso pendolo. Quest'ultima espressione è immune dal desiderio di portare il lettore – discente nel campo della speculazione filosofica; sembra unicamente invitare l'uomo ad accettare la morte come ultima eco della vita prima di traslare all'aldilà. Al pari dell'uomo, anch'essa è subordinata al Creatore di tutte le cose, per cui l'atto stesso del trapasso è gesto del Creatore medesimo con il quale egli distrugge la propria opera: *frangit opus suum rerum supremus conditor omnium (carm. 2, 26. Mors)*. Semantica ambivalente, la bipolarità della descrizione della morte non approda qui nel paradossale, ma in quanto esperienza traumatica della temporalità del soggetto trapassa nello spazio virtuale dell'accettazione e rassegnazione e, con un cambiamento di prospettiva, socchiude la porta alla consolazione e alla speranza: *mors moritura*²⁴. Le parole della rivelazione (*bibit verba salutis homo, carm. 4, 18. Mors*) e della virtù della croce, dalle quali si può intendere il significato del concetto di *kerigma*²⁵, si offrono come forza sovratemporale deframmentante, come *Certa salus...non morietur homo, vita perennis est (carm. 4, 18. Mors)* con cui la vita terrena si converte in eterna, e la *mors*, in quanto caratteristica saliente della vita temporale, è essa stessa mortale, soccombe:

*Et mors moritura cadet virtute crucis (carm.
8, Epistola 1).*

Riponendo tutta la speranza nel concetto cristiano della possibilità di redenzione dell'uomo, manipolando il sentimento di paura della morte, minacciosa fine corporale e esistenziale, probabile inesorabile castigo dell'uomo, egli esce dalla sfera didattica e reiterando i motivi e con esplicita autocitazione linguistica passa nella sfera ossessivo-imperativa del *memento mori!*, parole con le quali chiude la raccolta e riassume la sua poetica.

Sono parole che rinforzano ulteriormente la sua constatazione annunciata nel titolo di questo capitolo: *mors adest*, la constatazione cioè che un destino minaccioso e ineluttabile non è di là da venire, ma in effetti è già qui, con cui sintetizza dolorosamente, concentrandolo, tutto il suo vissuto. *Sic*.

23 *Carm. 8, Elegia: "Omnia subduntur morti, reginae per orbem/ Scepra tenet, nullo rege domanda tenet.*

24 *Est potens Agnus (memini), ferocem Crux domat mortem, tamen ecce multa Illius virtus, moritura mors est, Strata iacebit. (carm. 4, 6. Mors)*

25 Sulla critica del credere dalle posizioni della psicoanalisi della religione, vedi Skledar (Skledar, 2007, 203–211). „Vale a dire, si tratta della stessa cosa: la morte di un oggetto metafisico e di un oggetto religioso. La psicoanalisi di Freud è una via di questa morte. Così Ricoeur distingue e divide nettamente la fede dalla religione, la fede nel sacro come segno di un altro sacro a venire, dalla fede nell'oggetto religioso del mondo umano della cultura, che così diviso, in una parte rimane sacro, ed in un altro diventa profano. Parla anche dei limiti della psicoanalisi della religione, cioè sulla sua critica della fede come esclusione della possibilità che la fede partecipi all'origine dell'eros opposto alla morte, essendo che a detta critica sfugge il kerigma dell'amore. D'altro canto, sottolinea che con l'aiuto della suddetta critica si può distinguere ciò che il kerigma dell'amore esclude: la cristologia punitrice e tutte le implicazioni di un intransigente Dio morale“ (Skledar, 2007, 208).

CONCLUSIONE

Concludendo, è evidente che l'approccio di Schneider al fenomeno della morte è cruciale per decodificare la sua poesia, dove l'accesso interpretativo va ricercato nella matrice cristiana che si riflette nel sostrato lirico di tutta la silloge. In generale, all'interno dell'opera la *mors* si trasforma da fenomeno eminentemente fisico in una forza elementare, onnipresente e totalmente distruttiva, però anche completamente livellante, inevitabile sulla via del ritorno al Creatore. È una cognizione che ha sul poeta un effetto tale per cui, assumendo la *mors* in tutta la pregnanza del suo significato, la eleva a livello di etimo spirituale, di movente lirico fondamentale, il che conduce alla formulazione della poetica dell'accettazione della transitorietà,

la quale ne caratterizza l'opera tutta. I destini individuali storico–evenemenziali, ivi compreso il suo, non sono al centro dell'interesse del poeta. Sono visti come frammenti e immagini ingannevoli, la cui esistenza temporale è solamente una fase passeggera ed effimera. In tal senso la *mors* viene accostata, come forza deframmentante, innegabile e complementare, alla virtù della croce, in un mondo la cui causalità è a esso stesso estrinseca. In quanto costituente dominante della sua lirica, essa si rispecchia massimamente nella consapevolezza che non si tratta di una forza ancora di là dal raggiungere l'uomo, ma che è peculiarmente immanente, onnipresente a tutto ciò che è caduco: *mors adest*. I tratti pedagogici dell'opera diventano perciò ossessivo–imperativi e vengono posti al servizio della *salus* cristiana.

JOSEPHI SCHNEIDER »CARMINUM LIBRI OCTO«
MORS, BISTVENA PRVINA PESNIŠKEGA IZRAZA JOSEPHA SCHNEIDERJA

Nada BULIĆ

Univerza v Zadru, Via M. Pavlinović 1, 23000 Zadar, Hrvaška
e-mail: nbulic@unizd.hr

Ante MATAN

Univerza J. Dobrila v Pulju, Filozofska fakulteta, Via I. M. Rojgov 1, 52100 Pulj, Hrvaška
e-mail: ante.matan@unipu.hr

POVZETEK

Avtorja v prispevku obravnavata "Carminum libri octo", edino in malo znano pesniško delo teologa Josepha Schneiderja. Za namene interpretacije in vrednotenja je zbirka predstavljena s posebnim poudarkom na motivu smrti, ki prevladuje v celotni lirični podstati Schneiderjevega pesnjenja. Izbor obsega 130 ód, razdeljenih v osem zvezkov. Uporaba različnih metričnih oblik v verzifikaciji dokazuje pesnikovo dobro poznavanje klasičnih vzorov. Vsebinsko se zbirka odlikuje po motivično-tematski doslednosti, ki jasno kaže na samostojno organsko celoto. Poleg motiva smrti so pogosti tudi nabožni krščanski motivi: nebesa, obhajilo, greh, pokopališče, kesanje, odrešenje, trpljenje, mučeništvo. V prispevku je izpostavljeno, kako ključen je za razumevanje in interpretacijo pesnikovega dela njegov odnos do smrti, ki po mnenju avtorjev korenini v krščanski matrici schneiderjanske identitete. Avtorja s številnimi primeri ponazorita pesnikov ambivalentni pogled na smrt in duhovni pomen, ki ji ga pesnik pripisuje. V njegovem delu se mors iz navidezno zgolj fizičnega pojava spremeni v prvinsko silo, ki je vsenavzočna in popolnoma uničujoča, a tudi izravnalna in neizogibna na poti nazaj k Stvarniku. Posledica tega zavedanja je izoblikovanje pesnikove temeljne lirične determinante, ki narekuje njegovo poetiko sprejemanja minljivosti. Kar zadeva zgodovinsko stvarnost, schneiderjanski svet ni izraz historične faktografije in v središče zanimanja tudi ne postavlja usode posameznika. Njegovo avtorsko obzorje določa motiv človekovega splošnega bivanjskega izkustva, kjer je osebno-izkustveno prosto vsakršne individualnosti in zvedeno na dva univerzalna izkustvena trenutka: fenomenologijo človeka v bivanju in bivanjsko smrt. Znotraj tega obzorja se izoblikuje miselna slika sveta, v katerem je od rojstva determiniran človek pahnjen v begotno življenje in soočen z mogočno, neizprosno mors. Usode in življenja posameznikov predstavljajo varljive drobce in podobe, v katerih je posvetno bivanje zgolj prehodna in efemerna razvojna stopnja. Smrt je tu razumljena kot sila, ki – defragmentirana in neizpodbitna – dopolnjuje moč križa v svetu, ki mu je naključnost tuja. Kot prevladujoča prvina Schneiderjeve lirike se najbolje zrcali v pojmovanju, da je, kot značilno imanentna vsemu minljivemu, vsenavzočna: mors adest.

Ključne besede: Joseph Schneider, Carminum libri octo, poetika, smrt, verzifikacija

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MARISA MADIERI, JAN MORRIS AND IRENA ŽERJAL:
ENGLISH, ISTRIAN TRIESTINE AND SLOVENE LITERARISATION OF TRIESTE
AND THE SURROUNDING AREA AT THE END OF WORLD WAR II

Ana TOROŠ

University of Nova Gorica, Vipavska 13, 5000 Nova Gorica, Slovenia
e-mail: ana.toros@ung.si

ABSTRACT

This paper analyses the ways in which the town of Trieste and its surrounding area are portrayed in literary works in the period following World War II. To this end, we have adopted a comparative approach in analysing three novels about the town of Trieste written by Irena Žerjal, Marisa Madieri and Jan Morris, belonging to different cultural and language traditions. Our analysis applied an interdisciplinary approach; geocriticism and literary imagology as well as the concepts of traumatic collective memory and postmemory. From a geocritical perspective, we have interpreted the literarisation of the town of Trieste from three different perspectives: the perspective of a Slovene author (Irena Žerjal); the Western-European perspective (Jan Morris); and the exile's perspective (Marisa Madieri). All three authors adopt a similar approach in their literary representations of the town of Trieste, namely going back in time, which allows them to shift the action from the present to the past, i.e. to Trieste as they knew it in their youth. In doing so, each author focuses on a different part of town. In those rare occurrences where action is set in the same places, each author ascribes a different meaning to the location. While the authors acknowledge the presence of the Other in Trieste, this has a negligible impact on the novel's course of action.

Keywords: Marisa Madieri, Irena Žerjal, Jan Morris, Trieste

MARISA MADIERI, JAN MORRIS E IRENA ŽERJAL: LETTERATURA INGLESE, TRIESTINA
ISTRIANA E SLOVENA SULLA TRIESTE E DINTORNI ALLA FINE DELLA SECONDA
GUERRA MONDIALE

SINTESI

Nel presente articolo, abbiamo utilizzato un'analisi comparativa per indagare il modo in cui la città di Trieste e il territorio triestino sono stati letteralizzati durante la fine della seconda guerra mondiale, in romanzi appartenenti a tre diverse tradizioni culturali e linguistiche. Si tratta dei romanzi su Trieste scritti da Irena Žerjal, Marisa Madieri e Jan Morris. L'analisi si è basata su un approccio interdisciplinare: geocritica, immagologia letteraria, memoria collettiva e postmemoria. Nel contesto dell'analisi geocritica, abbiamo osservato la percezione di Trieste espressa dalle tre autrici che denota tre diversi punti di vista: la visione nativa (Irena Žerjal), il punto di vista di un viaggiatore del Europa Occidentale (Jan Morris), il punto di vista di un rifugiato (Marisa Madieri). Le autrici usano un metodo simile per descrivere la città, ovvero il tempo salta dal presente alla Trieste della loro giovinezza. Le stesse si focalizzano su varie aree della città, ma raramente si soffermano sugli stessi luoghi. In tal caso, questi ultimi vengono comunque presentati in modo diverso. L'Altro nella città ha un ruolo minore nei loro romanzi.

Parole chiave: Marisa Madieri, Irena Žerjal, Jan Morris, Trieste

INTRODUCTION

This paper analyses three novels written in three different languages: Slovene, Italian and English.¹ At the end of the Second World War, our three authors—a Slovene woman from Trieste, a woman from Istria and a woman from Wales/England—all ended up living in the same place, i.e. the town of Trieste and the surrounding area. As adults, they have turned their youthful memories of life in this town into literary discourse.

Irena Žerjal (1940–2018) was born in the village of Ricmanje, near Trieste, where she spent her childhood. After graduating in Slavistics from the University of Ljubljana, she worked as a teacher, a translator, a poet and a writer. Her early childhood memories about the end of the Second World War and the post-war period in Trieste under the Allied Military Government are recounted in her novel *Kreda in hijacinte* (Chalk and Hyacinths). After many years of writing, the novel was finally completed in 1990 (Žerjal, 2006, 149) and was first published in 2006.

Marisa Madieri (1938–1996) was born in Rijeka. In 1949, she was exiled from Istria² with her whole family and ended up in the Silos reception centre for exiles in Trieste. After finishing her studies in literature, she worked as an English teacher and started a family with the writer Claudio Magris. She lived in Trieste until her death many years later. Her novel *Verde acqua* (Aqua Green), which was published in 1987, is a collection of emotional fragmentary memories of her first years in Trieste.

Jan Morris was born in 1926 as James Morris to an English mother and a Welsh father. She is considered to be one of the greatest English authors from the post-war period and is an internationally-renowned journalist. After the end of the Second World War, i.e. from 1946, she spent some time in Trieste as a soldier of the Allied Military Government (she changed gender in 1972). Although she only lived in Trieste for a short time, this town made a lasting impact on her. In the following decades she returned to Trieste many times and in 2001 she depicted the town in her novel.

In conducting a comparative analysis of the above-mentioned novels, we will draw from an interdisciplinary approach: from geocriticism (Westphal, 2011), from literary imagology (Beller & Leerssen, 2007), and from the concepts of traumatic collective memory and postmemory (Halbwachs, 2001; Hirsch, 2008).³

Geocriticism originates in from the field of comparative literature and is based on the premise that: “the referent and its representation are interdepend-

ent and interactive” (Westphal, 2011, 113). One of the methodological tenets of geocriticism is the multifocalisation of views on a given referential space (Westphal, 2011, 113). Multifocalisation is expressed in three basic variations: endogenous (autochthonic vision), exogenous (vision of the traveller), allogeneous (somewhere in between) (Westphal, 2011, 128). We should also take into account polysensoriality (which states that we experience our environment with all the five the senses: sight, smell, taste, touch and hearing (Westphal, 2011, 132). Literary imagology draws from comparative literature and focuses on the binary opposition between the Self (the home culture) and the Other (the foreign culture).

Firstly, we shall analyse how each author portrays Trieste and its surrounding area. We will focus in particular on the importance that each author ascribes to the different parts of town and to the town’s surroundings, i.e. to the town as a whole. Secondly, we shall analyse the literary strategies used by each author to achieve the desired effect in their literary characterisations, for example the use of sensory inputs (colours, sounds, smells, etc.). We will then focus on how authors deal with, reflect on and problematise the presence of the Other in town. For example, we will analyse the instances in which Jan Morris talks about the Slovene population of Trieste and the passages in which she mentions the presence of people from Istria in town. In doing so, we will look into the literary strategies she uses to include these two groups in her narrative and we will attempt to define what role they play in her literary representation of Trieste. Specific aspects of the three selected works will be analysed applying from geocriticism and literary imagology, while also taking into account the impact of traumatic collective memory and postmemory on the literary representation of Trieste and its surrounding area.

THE DEPICTION OF TRIESTE BY IRENA ŽERJAL,
MARISA MADIERI AND JAN MORRIS

Chalk and Hyacinths

Verka, the main character in the novel *Kreda in hijacinte* (Chalk and Hyacinths) remembers Trieste in 1945, right after the end of World War II, with the following words:

Everything was chaotic. In town, a crowd of people was singing and shouting. There were those who had returned from Nazi concentra-

1 A comparison would also be possible with the novel in the context of Italian Triestine literature – the literature of the majority – but this is beyond the scope of the present article.

2 For additional information on Istrian exiles see for example Gombač (2005).

3 For additional information on literary imagology see Beller & Leerssen (2007). For additional information on the notion of collective memory see Halbwachs (2001). Postmemory is defined as the transfer of traumatic collective memory from the generation that experienced trauma to the following generations (Hirsch, 2008).

tion camps, exiles, people who were homeless in their own town, persecutors whose names had been put on the list to be incinerated at the Risiera di San Sabba, ordinary people who had been pushed on the verge of poverty by the war, as well as supporters of the former fascist ideology [...] As English-speaking people flocked into our house, a wagon carrying bay-leaf wreaths and a trampled flag drove by, followed by a lorry full of exhausted but cheerful partisans. (Žerjal, 2006, 25)

Soon after the end of the war, all this unrest and chaos subside. Memories of bombings and lives being under threat are replaced by idyllic descriptions of the villages on the outskirts of Trieste. Here one can find plenty of fruits and vegetables, all kinds of crops, tasty home-made food, fresh-baked bread, fish, oil and wine. Although the author focuses on farmers who work hard on their farms, in their gardens, fields and vineyards, these are happy scenes. In fact, the narrative conveys vitality and true passion for life. The people are busy rebuilding the buildings that have been torn down, happy couples are getting married and babies are born. These scenes also imply that the Slovene people in Trieste belong to a tightly-knit community, and cooperate in organising sport events, running cultural associations and attending religious services. Considerable importance is given to Slovene-language schools and to the use of the Slovene language. Schoolchildren have the opportunity to attend drama classes, to improve their public speaking skills, to perform radio dramas or publish their writings in magazines. Verka, the novel's protagonist, attends grammar school and reads many classics (works by Sienkiewicz, Čehov and Dostojevski) (Žerjal, 2006, 60, 66, 72). Interestingly, however, Italian authors are not mentioned in the novel, nor is the everyday life of the Italian population of Trieste. The author's literary strategy of "erasing" the Italian-speaking community from the narrative is most likely related to traumatic collective memory and to the oppression of the Slovene people in the province of Trieste.⁴ This assumption is validated in several places in the novel where attention is drawn to the contrast between the nationally-conscious Slovene community and the Italian inhabitants of Trieste, who often display anti-Slovene feelings. The author also points out that the use of the Slovene language in public places was not viewed favourably by the Italian population:

There was a lot of talk about politics, about how some people⁵ responded to hateful comments from the elderly,⁶ who did not like the fact that they spoke Slovene on the famous Molo San Carlo celebrated by Kette.⁷ Not even a year had passed since Italy, with its countless promises, had been proclaimed the ruler of Trieste. (Žerjal, 2006, 61)

Thus, Irena Žerjal portrays Trieste as a very lively town which draws its strength from the tightly-knit Slovene Triestine community. The latter strives to preserve and strengthen the national identity of the Slovene people in the province of Trieste. Consequently, readers are not given detailed descriptions of the various town quarters, nor does the author show emotional attachment to specific parts of town. Her focus is on the neighbourhoods where young Slovene people meet: the grammar school of Via Lazzaretto Vecchio, the pastry shop, the San Giusto hill overlooking the town and the seaside quarters of Barcola and Miramare.

The author focuses on the life of the Slovene inhabitants of Trieste; her novel does not include scenes portraying the life and activities of the Italian-speaking population. This also becomes apparent in her choices of place names. The dock which was then known as Molo Audace is referred to with its old name of Molo San Carlo, which was used under Austro-Hungarian rule. Thus, it can be inferred that the author indirectly rejects the Italianisation of Trieste.

Verde acqua (Aqua Green)

In her novel, Marisa Madieri focuses on her impressions of Trieste in the postwar period. The town comes to life through her memories, which seem to suggest that she has not yet fully overcome the trauma of being exiled from Istria, living in poverty in the Silos reception centre for exiles in Trieste and being ashamed of her situation in her teenage years. Also central to her memories is her mother's affection and her own feeling of distress. The title *Aqua Green* actually refers to the colour of a skirt her mother bought her after selling her few valuable possessions so that she could pay a visit to her wealthy Triestine classmate without feeling embarrassed. Thus, for the author the aqua green colour is a symbol of love (Madieri, 2003, 129–130).

4 For additional information on the oppression of the Slovene population under the Fascist regime see for example Kacin Wohinz & Pirjevec (2000), Čermelj (1965).

5 Author's note: Here Irena Žerjal refers to Slovene people.

6 Author's note: Here Irena Žerjal refers to Italian people.

7 The author mentions the cycle of poems titled *Na molu San Carlo* (On the San Carlo dock) by the Slovene poet Dragotin Kette (1876–1899). The former *Molo San Carlo* (today called *Molo Audace*) is the town's main dock situated in one of the town's most popular walking areas. *Molo Audace* got its current name at the end of the First World War after the Italian military ship *Audace* which was the first ship to moor in Trieste. Thus, symbolically it conquered the town.

In her memoirs the author describes her arrival in Trieste and her first impressions of the town

My first impression when I arrived in Trieste [...] was that of heaven on earth, of a promised land. To me, the busy streets, the white bread, the abundance of newspapers, weekly magazines and comic books at the news-stands, the goods displayed in shop windows and the way people dressed represented great wealth. (Maderi, 2003, 51)

This image of wealth is in stark contrast with that of the Silos reception centre for exiles, which became the author's home for many years. The Silos is compared to Dante's *Inferno*: a place full of small, poorly-lit, dusty stalls which accommodated whole families. In the author's memories, the Silos smells of sweat, hospitals and cooked beans—food for the poor, which was the main staple of the people living there (Maderi, 2003, 75, 112). Due to poor acoustic isolation the place is filled with constant noise: the sounds of the radio coming from various stalls, the sound of coughing, crying, yelling, raindrops falling from a leaky roof, etc. (Maderi, 2003, 74–75, 107). Despite the evident lack of privacy, the author associates the Silos with feelings of loneliness (Maderi, 2003, 104, 115).

On the one hand, the Silos is full of people shivering in the windy Triestine winter. The author remembers how her mother used to boil water for her to warm her feet in while she was studying: *“When I was studying and I had to spend long hours reading books, my mother used to boil water, fill up a basin and place it under the table so that I could soak my aching feet in it”* (Maderi, 2003, 101). On the other hand, in summer the Silos is unbearably hot, so the author remembers spending time in the shade of trees in Piazza Libertà or in the seaside quarter of Barcola (Maderi, 2003, 86). The passage about the summer heat contains two of the few instances in which the author mentions a neighbourhood in Trieste other than the area around the Silos. Another place she includes in her narrative is Via Gambini, where she and her family used to get a meal which was prepared especially for the exiles at the Silos, and the Dante Alighieri grammar school (Maderi, 2003, 76, 85).

Memories of her teenage years are also filled with negative emotions. Above all, she feels ashamed for having to wear a worn-out dress, while her classmates wear fashionable clothes (Maderi, 2003, 102). The feeling of shame which leads to self-isolation is present in various parts of the novel:

It wasn't easy to combine my day-to-day life at the Silos with the outside world I discovered through reading. My teachers and my classmates [...] knew almost nothing about me, about how difficult it was to study in a cold and noisy place; they could not imagine how uncomfortable I felt for always wearing the same dress [...] I was ashamed of my situation. (Maderi, 2003, 121)

As it becomes clear from the above-mentioned passage, the constant noise in the Silos forced the author to learn how to completely isolate from the outside world. This way she was able to concentrate on her studies, whilst simultaneously escaping from the real world into an imaginary world. Her life at the Silos was no longer real, since her real life was happening in her imagination. Literature helped her considerably in creating a different reality: *“My friend lent me War and Peace. [...] Life at the Silos was more bearable if Natasha ended up marrying Pierre. [...] My life was a dream, the people around me were shadows”* (Maderi, 2003, 88, 105). In her quest to create her own genuine, beautiful and real life, the author does not want to grow up. Before becoming an adult she wants to be able to lead a normal life and experience everything she would have been able to enjoy under normal conditions (Maderi, 2003, 120).

Her perception of Trieste changes during her time as a student. On a summer day, when she leaves Barcola after going bathing and she heads back to the Silos after a storm, she looks at the sky and suddenly realises that:

In the background, at the end of the gulf, the contours of the houses and of bell tower of Piran were clearly visible. A bit further, beyond Istria, my home town would soon be covered in dark clouds, I thought. But I had no regrets. The waves, the sky, the wind there were the same as here. Suddenly, I felt at home. I started running and skipping, my heart filled with joy. (Maderi, 2003, 126)

Despite this positive step, we should not overlook the structure of her novel, which she wrote thirty years later. Her narrative which constantly shifts from the present—her life in Trieste with her husband and children—to the past, i.e. her life at the Silos. Since she has not fully overcome trauma, her past constantly resurfaces from her subconscious and permeates the present moment. This is when the author wishes she were able to surrender to her emotions.⁸

⁸ When a person loses someone dear or faces any kind of loss (the loss of their homeland, of freedom, etc.) a period of mourning follows. This period ends when the person elaborates the pain and accepts their loss. However, in case of traumatic events, a person may not be able to elaborate the loss and will therefore become melancholy. In such cases, the past constantly impinges on the present and the relationship with the traumatic event is preserved. Literature becomes the space where to express this feeling of nostalgia of the past and of what has been lost (Boulter, 2013).

Thus, it can be concluded that the author's representation of the town is based primarily on the opposition between Trieste—which symbolises abundance—and the Silos—a place of unpleasant visual, auditory and olfactory impressions, physical pain, hunger, loneliness and shame. Other parts of town are only mentioned in passing, since the author shows little interest in them.

Trieste and the Meaning of Nowhere

Jan Morris starts her Triestine journey with the following words: *"Ever since I arrived there as a young soldier at the end of the Second World War, the city has curiously haunted me"* (Morris, 2001, 3). Her relationship with this town is ambivalent. Despite the feeling of melancholy, it evokes in her, she keeps coming back: *"In Trieste more than anywhere I remember lost times, lost chances, lost friends, with the sweet tristesse that is onomatopoeic to the place"* (Morris, 2001, 188).

In her discovery of Trieste, Jan Morris pays special attention to the town's geographic and historical peculiarities. She shows interest in architecture, in the Trieste railway and in local fashion in Habsburg times (Morris, 2001, 5, 20, 24, 41, 50, 53, 57). A special chapter of her novel is dedicated to Jews: *"In my mind Jews and Trieste go together /.../ in Habsburg times people in Vienna considered Trieste a Jewish city"* (Morris, 2001, 89). The author often draws cultural, historical and national analogies between events that occurred in Trieste and her native Wales (Morris, 2001, 4, 99, 116). On several instances she goes as far as to compare Trieste to Chicago, Riga and Vilnius (Morris, 2002, 50, 102). She shows particular interest in writers (Marcel Proust, Umberto Saba, Ricarda Huch, Italo Svevo; Morris, 2001, 65), intellectuals and other prominent figures of different nationalities who spent a period of time in Trieste. Thus, she unveils fragments of James Joyce's life by taking the reader on a tour of the different town quarters (Morris, 2001, 8, 92, 98, 112). She sees the town as being the centre of socio-political life, while it also serves as a backdrop for intimate stories and anecdotes about local and foreign intellectuals and prominent figures. In her own words, the essence of Trieste lies precisely in this transition between reality and fiction: *"[T]he true meaning of nowhere—this half-real, half-wishful Utopia"* (Morris, 2001, 181). She then continues: *"For all its traditional sobriety Trieste is a hallucinatory city, where fantasy easily brushes fact,*

and a lot of what I have written about it has come from my own mind" (Morris, 2001, 187).

Thus, the author is able to roam around Trieste in Habsburg times in the company of Maximilian, Franz Joseph's brother, who resided in Miramare Castle (Morris, 2001, 13). *"'Hurry up, coachman; Maximilian calls as his carriage pulls away from the Obelisk, 'the Governor is expecting us for dinner'"* (Morris, 2001, 16).

To describe the town's unique Italian cultural identity, Italian Triestine authors from the beginning of the 20th century came up with the concept of *triestinità*, while later on their Slovene counterparts coined a similar term—*tržaškost*—to talk about the town's multicultural identity.⁹ Jan Morris, too, feels the need to define the town's elusive essence and attempts to capture it by using the term *triesticity*:

During my original time in Trieste I had a dear friend who was to become central to my conception of the place. Otto was a bit of a mystery. His national origins were indeterminate. [...] His manner was a mixture of the florid, the stiff and the deliberately outrageous. [...] In those days I thought of his ironically tolerant outlook as idiosyncratic cosmopolitanism, but now I would characterize it as Triesticity (Morris, 2001, 117).

At this point, it is also worth mentioning the author's astonishment at some unusual, mangled surnames present in town: *"Any list of Trieste names, in almost any context, is bewilderingly multi-ethnic. The orchestra that played [...] last time I was at the opera, included violinists named Ivecic and Leszczynski, a cellist called Iztok Kodric, Neri Noferini a horn player and an oboist named Giuseppe Mis Cipolat"* (Morris, 2001, 98).¹⁰

As it becomes evident, the author's perception of Trieste is that of a very diverse and dynamic town. In fact, she defines it as a hallucinatory town, thus allowing reality and fiction to merge freely in her descriptions and memories of life in Trieste and in her journey back in time to the Habsburg era. She recounts the town's past during the Habsburg empire, which in her opinion, represented the town's golden age. Thus, Trieste evokes in her feelings of melancholy about times past and all that has been lost. At the same time, she sees Trieste as a mysterious, undefined and complex town. All of these features are included in the concept of *triesticity*.

9 For additional information on the concepts of *tržaškost* and *triestinità* see Toroš, 2014; Pizzi, 2007.

10 In his review, Ložar draws attention to the author's carelessness or rather lack of knowledge of the Slovene/Croatian/Italian language. The correct spellings of proper names, as listed by Ložar, are as follows: Ivcevic, Iztok, Giuseppe. Ložar also points at some other misspelled Slovene and Italian words, and notes that the author often uses the term *Slavic* when she should be using the more appropriate term *Slovene* instead. Ložar focuses particularly on the chapter "Risiera's victims", in which there is no mention of the Slovene victims (Ložar, 2003).

When the author talks about Trieste, she takes into consideration the town's Roman and Germanic cultural traditions. In fact, the novel includes a number of anecdotes relating to James Joyce's Triestine period. Her idea of *triesticity* most likely ensued from the Italian concept of *triestinità*. The author seems to be unaware of the historical significance of some Slovene and Istrian Triestine literary symbols. One such symbol is the *Molo San Carlo*, the dock celebrated by the Slovene poet Dragotin Kette. Although the dock is one of the novel's settings, the author does not mention Slovene literary traditions related to this place, namely Kette's poem *Molo San Carlo*. Moreover, in Morris's work there are no references to the Silos, which is a crucial feature of Madieri's work.

A COMPARATIVE ANALYSIS

Us, You and Them in Trieste. Slovene, English and Istrian literary intersections in Trieste

Trieste and the Meaning of Nowhere

As suggested at the end of the previous section, when mentioning the Slovene Triestine community and the Istrian Triestine community, Jan Morris does not provide much detail on the day-to-day life of these communities. In fact, she shows little curiosity and does not pay much attention to literary symbols of these two communities present around town in the way she does with Germanic and Romanic authors (for example, she mentions "the Rilke path", "the Svevo trail", "the Joyce trail" (Morris, 2001, 173). When it comes to the Slovene and Istrian communities, she only refers to a number of historical and political events relating to the two communities. Slovenes are mentioned when she writes about the oppression of the Slovene population in Trieste and about the ban on the Slovene language in the interwar period (Morris, 2001, 114), while Istrians are mentioned when she narrates their postwar exodus (Morris, 2001, 143).

Chalk and Hyacinths

In Irena Žerjal's novel, the Allied Military Government, or rather the Allied soldiers who came to Trieste (i.e. the group Morris belonged to when she first arrived in town) are mentioned when the author recalls the time when her father was job-hunting. In fact, Verka's father is looking for a job at the Allied Military Government, but to no avail. This episode is mentioned in several passages of the novel, since it had a considerable impact on their finances. Moreover, job hunting was psychologically draining: "It is obvious that everything is a political decision. Someone like me, who is fluent in several languages and who was the first telegraphist and endured horrible working conditions,

is now forced to carry sacks" (Žerjal, 2006, 57). The author continues: "Granny Karla knew that he should be able to secure at least a part-time job and a regular income at the Allied Military Government that administered Trieste, but there was no hope" (Žerjal, 2006, 28, 29, 31). On the other hand, skilled seamstresses made a very good living under the Free Territory of Trieste: "Seamstresses who offered to sew parachute silk shirts earned good money for the heaps of clothes they sewed and ironed for the Allied soldiers" (Žerjal, 2006, 31). The Allied Military Government in Trieste is subsequently mentioned in relation to the establishment of Slovene-language schools after the war, since it was entrusted with selecting the teachers and its decisions were not always in line with the expectations of the members of the Slovene community (Žerjal, 2006, 37).

The above-mentioned extracts show that the Allied Military Government plays a marginal role in the novel's narrative. In fact, it is only included in the plot when its actions directly affect the Slovene community in Trieste. A similar pattern can be observed with regard to the Istrian Triestine community in the province of Trieste. Istrians ("many came from Yugoslavian villages in nearby Istria"; Žerjal, 2006, 32) are mentioned only in passing, namely in an episode where they advance demands for the priest in the Slovene countryside to say mass in Italian especially for them. Since the priest refuses, they report him to the archbishop.

These two examples show that the Other is a subject of interest only when it comes in direct contact with the local Slovene population and when its actions go against the interests of the Slovene community, which the protagonist is a member of. From the point of view of the imagology method, this is a relationship of phobia (the other two are philia and mania). It is characterized by fear, fear of another culture.

Aqua Green

In Marisa Madieri's novel, Allied soldiers are included in her first memory of Trieste. They are an integral part of the town's grandeur and of the author's general perception of Trieste as a wealthy town—in stark contrast with the poverty of the Silos:

The presence of English and American soldiers with very shiny shoes, who offered chewing gum to the children, never ceased to amaze me either. The Free Territory of Trieste had been created by the superpowers in the difficult post-war years and was divided into two Zones. Trieste belonged to Zone A. (Madieri, 2003, 51)

Marisa Madieri finds herself in a similar situation as Irena Žerjal, since her father's chances of employment depend on the decisions of the Allied Military

Government in Trieste. However, unlike Verka's father, Madieri's father had a positive experience with the new authority. He was offered a job, he learnt to speak English and befriended some allied soldiers: "*In a short time he was able to communicate in English. He made friends with the American soldiers and became their mascot due to his Herculean strength and adventurous spirit which made him look like a Far West hero*" (Madieri, 2003, 87).

There is another point where Marisa Madieri's narrative intersects with Irena Žerjal's literary world, namely in their descriptions of tensions between the Slovene and the Istrian community in Trieste. In one chapter, the reader meets Madieri's aunt on her mother's side. She is married to uncle Rudi, who is "*of Slavic origins*" (Madieri, 2003, 122) and is therefore ignored and insulted by his mother-in-law—the author's grandmother: "*Granny [...] ruined the atmosphere the most with her insinuations and insults directed towards the weaker sex. Slovene women were not only lazy, but also sciave*" (Madieri, 2003, 123). This negative stereotypical image of the Slavic population is characteristic of Italian irredentist literary works written by Italian Triestine authors. In later years, it also frequently appears as a metaimage in 20th century Slovene Triestine literature.¹¹

Three literary representations of Trieste and its surroundings. Crossing paths and isolated points of focus: the Karst, the Molo San Carlo, the Risiera di San Sabba and the Silos

As we have already seen, in the three novels analysed in this paper the presence of the Other in Trieste (the Slovene Triestine community, the Istrian Triestine community and the Allied Military Government) is only mentioned in passing. Instead, the novels focus on different settings in and around the town: squares, streets, etc.

Jan Morris's favourite setting is the centre of town (*Piazza Unità, Città vecchia*, etc.), where she lived when she first arrived in Trieste: "*The Hotel de la Ville was the American officers' club, the Albergo Savoia Excelsior was ours*" (Morris, 2001, 100). As she walks around this distinctively Habsburg neighbourhood, she adopts an extremely inquisitive approach and attempts to breathe some life into its forgotten stories—be they real or imaginary—which are closely related to the town's cultural and literary history. In doing so, she gives her personal interpretation and adds further developments of the plot.

As already noted, Marisa Madieri's focal point is the **Silos**. Although other parts of town are mentioned in her novel, she does not place great importance on them. Similarly, the novel by Irena Žerjal places emphasis on the life of the community to which she belongs—the Slovene Triestine community.

As has already been said, one point that Irena Žerjal's and Jan Morris's novels have in common is that they both mention the **Molo Audace** (Audace dock). As Jan Morris sits on the dock, she reflects on Trieste: "*On a warm day in 1946 I sat down on a bollard on the Molo Audace [...] to write a maudlin essay*" (Morris, 2001, 100). In contrast, Irena Žerjal calls this dock **pomol San Carlo** (San Carlo dock) and mentions it in relation to Slovene literary history, namely in relation to the poem *Na Molu San Carlo* (On the San Carlo Dock) by Dragotin Kette.

Marisa Madieri is socially unprivileged and therefore does not take part in social events which take place in **Triestine cafés**, nor does she include them in her novels. In contrast, Irena Žerjal frequents cafés with her classmates. Similarly, for Jan Morris: "*The smell of coffee*" is "*a classic fragrance of Trieste*" (Morris, 2001, 171). In fact, the vibe of bustling cafés takes her back to the past, when Trieste was a Habsburg town, more precisely to the year 1897. In her imagination, she becomes the protagonist, the guest of one of the cafés on the town's main square, from where she observes passers-by: "*All around me first-class passengers, awaiting the time to board their ship, are enjoying their last half-hour on Austrian soil before sailing away to America, Alexandria or the East*" (Morris, 2001, 43).

Another setting that Jan Morris's and Irena Žerjal's novels have in common is the former **Risiera di San Sabba**. However, the significance the two authors ascribe to this place is very different. Irena Žerjal explains her feelings about the Risiera in the novel's introduction: "*In her childhood, the protagonist and her family were taken off the list of "useless" beings, which was drawn up by Gestapo officers based on allegations from spies. The people on the list were to be incinerated in the Risiera—the symbol of degenerate fascist laws in force in the previous century*" (Žerjal, 2003, s. p.). Thus, for the protagonist the Risiera becomes a symbolic motivation for writing a novel about her family, about the Slovene Triestine community and its long-standing vitality in spite of the many the attempts to annihilate it. On the other hand, Jan Morris only mentions the Risiera in relation to the oppression of the Jewish people, and says: "*I hate to go there now. It is one place in Trieste that speaks of the tragic rather than the poignant*" (Morris, 2001, 92).

11 A metaimage is a concept from literary imagology. It designates a perception of the Self (the local culture) that is greatly dependent on the value that the Other (the foreign culture) is believed to attribute to it. For additional information see Leerssen (2016, 21). To learn more about stereotypical images of the Slovene people in Italian early 20th century literature see Toroš (2011). For examples of metaimages in Slovene Triestine literature (the image of the Self – how Triestine Slovenes believe the Other, i.e. the Istrian inhabitants of Trieste, sees them) see for example Čuk (1998) and Umek (2010).

The countryside of Trieste

Irena Žerjal's settings are mainly confined to the countryside surrounding the town, i.e. the Karst—the centre of cultural life of the Slovene Triestine community. Neighbourhoods inhabited by other, non-Slovene communities, are not mentioned.

The Karst is actually the only setting that all three novels have in common, since it features in the other two novels, too. All three authors describe it using similarly positive tones. At the end of the novel, Marisa Madieri enthusiastically recounts about discovering the wonderful natural landscape of the Val Rosandra. The latter serves as a bright comparison to the dark Silos (Madieri, 2003, 133).

Irena Žerjal considers the surroundings of Trieste and the Karst as her home: a place of abundance; a fertile land which yields a variety of wholesome crops; a vibrant and lively place inhabited by the hard-working and culturally active Slovene community. Jan Morris also depicts it using similar images of vitality: “with patches of extreme fertility. There vineyards flourish [...] a place of butterflies” (Morris, 2001, 136). For her, the Karst is also the antithesis to the town, “an antithesis to civic normality [...] it is very Balkan [...] is like an unexpected spell or exorcism, left in the attic” (Morris, 2001, 130, 138). Morris adopts a similar tone when describing the Istrian peninsula, Marisa Madieri's homeland: “[W]e are in the heartland of that esoteric abstraction. It is a hard country, like the Karst” (Morris, 2001, 147).

Thus, Jan Morris relates Slovene (Slavic) people with the Karst and the Balkans: exotic places which are in direct opposition to the town of Trieste. Her impressions of the Slovene (Slavic) world stems from a Western-European literary tradition and is based on the opposition between Western Europe—with which she is familiar—and Eastern Europe (the Balkans), i.e. from the contrast between civilisation on the one hand, and barbarity and savage beauty on the other.¹² In this regard, it is worth drawing attention to some obvious references to the work *Il mio Carso* (My Karst) by Scipio Slataper—whose thoughts are included in Jan Morris's novel on several occasions—and to his division of the world into Slavic, Germanic and Romanic cultures, where the Slavic culture is associated with nature and authenticity (Slataper, 2015).

Community, vitality and melancholy

Besides analysing the role and the meaning ascribed by the three authors to the various town quarters, it is important to look at the feelings that life in Trieste and its surroundings evokes in them. In fact, another common trait of these three novels is that they dwell

on the feelings evoked by the town: feelings of vitality in the case of Irena Žerjal, and melancholy in the case of Marisa Madieri and Jan Morris.

Irena Žerjal is not familiar with this feeling of melancholy. The Slovene microcosmos she describes is full of vitality. She gives prominence to her desire to preserve the Slovene identity and continue to study the Slavic and Slovene cultures. On the other hand, in Marisa Madieri's novel, there is no such feeling of belonging to a community. The only exceptions are the demonstrations in favour of the annexation of Trieste to Italy: “I, too, took part in the student protests and in this patriotic enthusiasm I felt, for the first time, that I belonged to a community and that I was an important part of it” (Madieri, 2003, 124). At the core of her perception of Trieste are feelings of anxiety and loneliness.

This melancholy perception of Trieste is similar to Jan Morris's feelings: “Trieste makes one ask sad questions of oneself” (Morris, 2001, 65). Morris tries to find the reasons behind this melancholy through in-depth reflections. In the end, she comes to the conclusion that this feeling of melancholy can be ascribed to historical developments, namely to the feeling that Trieste's golden era is long past; to the town's isolated location, to the Karstic landscape and to the weather, especially to the strong wind called the Bora (Morris, 2001, 66, 131).

Morris's perception of Trieste as a melancholy place goes hand in hand with her conviction that Trieste is a town for exiles. When thinking about the Russian writer Ivan Bunin—who spent most of his life in exile and is therefore Morris's archetype of an exile—she says: “He would have been among friends in Trieste, for this is a city made for exiles” (Morris, 2001, 74). She backs her statement with examples of famous people of different cultures and from different historical periods who found a job or a place to live in Trieste and who had a negative perception of this town: from Casanova and French noblemen exiled during the French revolution as well as those exiled under Napoleon's rule to writers who came to Trieste for work (Charles Lever, Henri Beyle–Stendhal, James Joyce, Richard Francis Burton) (Morris, 2001, 80, 82). She also points out that people in Trieste suffer from many imaginary illnesses and feel the need for self-reflection (Morris, 2001, 67, 121).

As it has already been said, when Jan Morris attempts to gain a better understanding of the town of Trieste and its specific characteristics, she draws primarily from Romanic and Germanic traditions. Thus, she does not gain a deep understanding of the problems of the Istrian Triestine community depicted by Madieri. Similarly, she does not mention the

¹² For a representation of the Balkans from a British viewpoint see Hammond (2010).

migratory currents going in the opposite direction, i.e. from Trieste to a foreign country. It should not be forgotten that the Slovene Triestine community was deeply impacted by such migration waves, especially in the inter-war years.¹³

Microperspectives, macroperspectives and trauma

At the end of this comparative analysis let us consider the authors' different outlooks on the town of Trieste by drawing from geocriticism (*"vision of the traveller"*, *"autochthonic vision"*, *"somewhere in between"*; Westphal, 2011, 128). In fact, these visions feature in the works of all three authors and can be regarded as consequences of their different perceptions of the town.

Irena Žerjal was born in the province of Trieste. Since she was immersed in the Slovene Triestine microcosmos, she does not have the outsider's vision that is characteristic of Jan Morris and Marisa Madieri. Despite some similarities, Morris and Madieri actually have fairly different visions of the town. The latter was an exile and was forced to live in an environment that she perceived as hostile, while—with the exception of her first short stay in as a soldier of the Allied Military Government—Jan Morris was free to choose where to stay. These different perspectives also stem from their different cultural backgrounds and geographical origins (Istria and Great Britain).

Jan Morris describes Trieste and its surroundings—the squares, the streets and the countryside—from the point of view of a town's temporary or occasional dweller, an outsider (vision of the traveller). Her accounts of life in town are lively and full of anecdotes from the lives of foreign writers who also lived in Trieste. Through her eyes, we discover a different, more diverse and animated town than the one we get to know through the works of Slovene Triestine authors. The main reason for such differences in perception probably depends on the fact that, when talking about Trieste, Slovene Triestine authors describe their home town and are therefore more likely to have a microvision, a narrower focus, greater attention to the details of everyday life. It is not surprising that they tend to include in their narrative those parts of town which are significant for the Slovene community (**autochthonic vision**). It should also be considered that Slovene Triestine authors from the war and postwar generations have a very specific outlook on Trieste. This can be ascribed to traumatic cultural memory and postmemory of the Slovene Triestine community. Thus, their narratives are characterised by a specific literary

discourse, its core topical issue or rather its main focal point being the oppression of the Slovene people in the province of Trieste, as well as the efforts to preserve the Slovene community and to ensure it gets the respect it deserves.

Based on Marisa Madieri's novel, similar features can be observed in Istrian Triestine literature. In fact, her narrative also focuses on a time characterised by traumatic collective memory, i.e. the period after the end of the World War II which marks the beginning of the Istrian exodus. The author's point of view is the same as that of other authors who have been exiled from the Istrian peninsula (**some-where in between**).

In her reflection on the traumatic memory of Triestine Jews, Jan Morris reaches a similar conclusion with regard to the persistence of traumatic memory: "[J]ust as what happened to the Jews of Trieste in 1943 may well last longer in the collective memory than all their years of successful exile" (Morris, 2001, 93).

CONCLUSION

Based on our analysis of three novels belonging to three different cultural and linguistic traditions, we have ascertained that each novel only provides insight into the life of one community of people living in the town of Trieste. Only by conducting a comparative analysis of all three novels do we gain a comprehensive, three dimensional and three-coloured view of what life in Trieste was really like at that time and of how it was recounted in literary works. From a geocritical perspective, it can be concluded that the literarisation of Trieste occurs through three different perspectives: the *"autochthonic vision"*, i.e. the microvision of a Slovene author (Irena Žerjal); the *"vision of the traveller"*, i.e. a Western-European macroperspective (Jan Morris); and a *"somewhere in between"* vision, i.e. an exile's perspective (Marisa Madieri). However, when depicting Trieste in their novels, the three authors adopt a similar approach and go back in time: from the present time to Trieste as they knew it in their youth. In doing so, each author focuses on different town quarters. Jan Morris concentrates on the very centre of town, i.e. the *"Habsburg"* area. In her novels there are several fictional, imaginary inserts. This is in line with the author's view of Trieste as a hallucinatory town. Marisa Madieri, on the other hand, describes life at the Silos exile centre by drawing on the senses: it is a place characterised by a multitude of noises, unpleasant smells and physical discomfort due to the cold weather in the winter and the heat in the summer. On the other hand, Irena Žerjal focuses on experiencing and

13 For additional information on migration from Trieste between the two wars see Kalc (2016).

portraying the vibrant and flourishing countryside on the outskirts of town. The three novels have very few settings in common and ascribe different meanings to those they do (e.g. the Molo Audace, the Risiera di San Sabba, the town's cafés and the Karst). Their contrasting perceptions of the same settings also indicate a lack of interest in the Other. Irena Žerjal's focal point is her own community, i.e. the Slovene Triestine community; Marisa Madieri focuses on the everyday life of Istrian people in the Silos centre for exiles; and Jan Morris concentrates on Trieste in Habsburg times, i.e. on the anecdotes of the lives of Western-European intellectuals and

other historical figures who spent time in Trieste. Although the Other (e.g. the Allied soldiers in Irena Žerjal's and Marisa Madieri's novels) is present in their literary works, it has a negligible impact on the plot's development. Moreover, the three authors have a different perception of the town of Trieste and of its distinctively "Triestine" features. For Irena Žerjal, this town is home to a lively Slovene community; for Marisa Madieri Trieste is a place characterised by loneliness, shame and poverty; for Jan Morris it is a nostalgic place which mourns its past glory, while at the same time being a mysterious, undefined and complex town.

MARISA MADIERI, JAN MORRIS IN IRENA ŽERJAL: ANGLEŠKA, ISTRSKOTRŽAŠKA IN SLOVENSKA LITERARIZACIJA TRSTA IN TRŽAŠKEGA PROSTORA OB KONCU DRUGE SVETOVNE VOJNE

Ana TOROŠ

Univerza v Novi Gorici, Vipavska 13, 5000 Nova Gorica, Slovenija
e-mail: ana.toros@ung.si

POVZETEK

V pričujočem članku smo raziskovali, na kakšen način sta literarizirana mesto Trst in tržaški prostor v obdobju konca druge svetovne vojne, in sicer v romanih, ki pripadajo trem različnim kulturnim in jezikovnim tradicijam, pri čemer smo ugotovili, da vsak od romanov ponuja uvid zgolj v življenje ene od skupnosti, ki so takrat sooblikovale tržaški vsakdan. Tako nam šele komparativna analiza vseh treh romanov ponuja celovitejši, trobarvni pogled na tržaški prostor tistega časa ter na metode literarizacije le-tega. V ta namen smo s komparativnim pristopom obravnavali romane o Trstu izpod peresa Irene Žerjal, Marise Madieri in Jan Morris. Pri analizi smo izhajali iz interdisciplinarnega pristopa, geokritike, literarne imagologije ter konceptov (travmatične) kolektivne memorije in postmemorije. V okviru geokritike smo razbrali literarizacijo Trsta skozi tri različna gledišča: slovenski (mikro)pogled (Irena Žerjal), zahodnoevropski (makro)pogled (Jan Morris), vmesno gledišče oziroma pogled begunke (Marisa Madieri). Avtorice uporabijo podobno metodo za literarizacijo mesta, in sicer časovne preskoke iz sedanjosti v Trst njihove mladosti, pri čemer osvetljujejo različne mestne predele; Morrisonova predvsem osrednji, habsburški del mesta, Madierova begunski center Silos, Žerjalova tržaško podeželje. V primeru redkih dogajalnih stičišč pa so slednji običajno drugače poantirani (Pomol Audace, Rižarna, tržaške kavarne, Kras). Različnosti dogajalnih prizorišč sledi tudi odsotnost zanimanja za Drugega v mestu. Žerjalova je osredotočena na življenje njene lastne, slovenske tržaške skupnosti, Madierova na življenje Istranov v Silosu, Morrisonova na habsburški Trst oziroma na zahodnoevropske kulturnike v Trstu. Zaznavanje Drugega na Tržaškem (denimo zavezniških vojakov pri Žerjalovi in Madierovi) je sicer prisotno, vendar nima globljega pomena za razvoj romanesknega dogajanja. Različno je tudi občutenje Trsta in Tržaškega kot celote. Za Žerjalovo je to prostor vitalne slovenske skupnosti, za Madierovo je to prostor osamljenosti, sramu, pomanjkanja. Morrisonovi mesto poraja občutke melanholije nad vsem minulim in izgubljenim. Obenem je to zanjo mesto misterija, nedoločenosti in kompleksnosti.

Ključne besede: Marisa Madieri, Irena Žerjal, Jan Morris, Trst

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PERCEPTION AND COPING WITH MOBBING TOWARDS WOMEN IN MONTENEGRO

Tatjana VUJOVIĆ

University of Montenegro, Faculty of Philosophy Nikšić, Department of Sociology, 81 400 Danila Bojovića bb
e-mail: tanja_vujovic@yahoo.com

ABSTRACT

Previous research shows the frequency of various forms of mobbing in the workplace, especially in women. Different strategies for coping with this stressor have not been explored so far. Therefore, the aim of this research was to examine the types of mobbing, as well as ways of coping with mobbing among women employed in the public and private sector in Montenegro. The research included a total of 170 respondents: nurses (N = 90) employed at the Clinical Center of Montenegro and employees (N = 80) of the Telecommunications Company – Telekom. The respondents ranged in age from 20 to 59 years. When it comes to the nurses' perception of mobbing, the method of factor analysis Principal Component Analysis yielded four factors that were interpreted as an attack: on work activity, attack on personality, sexual harassment, and humiliation in front of the superior. Discriminant analysis showed that there is a statistically significant difference between these two groups when it comes to offensive jokes, offensive comments related to religious and party affiliations, exclusion and isolation.

Keywords: mobbing, women, private sector, public sector, prevention

LA PERCEZIONE DEL MOBBING SULLE DONNE SUL POSTO DI LAVORO IN MONTENEGRO

SINTESI

La ricerca precedente mostra la frequenza di segnalazione di forme di mobbing nei luoghi di lavoro, specialmente sulle donne. Le diverse strategie per far fronte allo stress da mobbing non sono state ancora studiate. Pertanto, lo scopo di questa ricerca era di indagare i tipi di mobbing sulle donne nel settore pubblico e privato. In questa ricerca, le infermiere (N = 90) che lavoravano presso il Centro clinico del Montenegro e le dipendenti (N = 80) della società di telecomunicazioni – Telekom. Le rispondenti avevano un'età compresa tra 20 e 59 anni. Quando si tratta della percezione del mobbing da parte delle infermiere, con il metodo dell'analisi fattoriale Principal Component Analysis sono stati estratti quattro tipi di attacco che sono descritti come un attacco all'attività lavorativa, un attacco sulla personalità, umiliazione di fronte al superiore e molestie sessuali. L'analisi discriminativa ha mostrato che esiste una differenza statisticamente significativa tra questi due gruppi quando si tratta di battute offensive, commenti offensivi riguardanti l'appartenenza religiosa e politica l'esclusione e l'isolamento.

Parole chiave: mobbing, donne, settore privato, settore pubblico, prevenzione

INTRODUCTION

In order to be able to define mobbing as a specific phenomenon in the working environment it is crucial that we look into some of the pioneering research that began in the 20th century. The framework of mobbing research sprouted from the groundwork of research on harassment in the workplace. In 1976, American psychiatrist Carroll M. Brodsky in his book *The Harassed Worker* gave a detailed description of negative actions at work which by their nature went beyond the then known concepts such as sexual harassment and discrimination. Brodsky wrote about “light teasing” such as making inappropriate jokes and mocking and “severe teasing”, such as torturing and severely abusing a person. In the same book, Brodsky describes the way in which various forms of “teasing” and other forms of psychological pressure are used within the work context to make it clear to the employees that they are not part of the group (Brodsky, 1976, 19).¹

Although the professional and scientific public learned from the description of various cases of abuse in this book that employees may be exposed to physical and verbal abuse, which are not necessarily sexual in nature, this concept did not arouse wider interest,² until the first theoretical and empirical papers of a Swedish psychologist and psychiatrist of German origin, Heinz Leymann. Thus, this topic was officially introduced to the research scene of occupational psychology only in 1984 with first exploratory study on harassment at work, which was published in Swedish by Heinz Leymann and Annelie Gustavsson (Leymann & Gustavsson, 1984; Zapf & Leymann, 1996). Leymann is believed to have been the first to use the term “mobbing” to describe aggressive behaviour among employees (Leymann, 1990). However, this term has somewhat longer history.³ The term “mobbing” is used in Europe in parallel with the term “bullying” to describe a specific form of attack in the workplace (Petrović et al., 2014, 188). The reason for the existence of the two parallel terms to describe the same phenomenon is that both have the shortcomings

that made it difficult for researchers to accept one and reject the other (Leymann, 1990, 120; Petrović et al., 2014, 188).⁴

A more intensive study on mobbing began in the early 1990s (Samnani, 2013; Einarsen, 2000; Einarsen et al., 2009). The topicality of harassment at work is growing along with continuous accelerated technological development and frequent economic turbulences which contribute to business world and work environment becoming more stressful than before. Modern society is characterized by numerous changes. High competition in the market, privatization, the economic crisis, job insecurity and expectation of flexibility from the workers have led to an increase in frequency of mobbing (Kostelić-Martić, 2005, 7; cf. Ćurčić, 2015, 20; cf. Vulekić, 2015, 50).

Women in Montenegro are legally equal to men. Formally legally, they have equal rights when entering employment, in achieving social security, in earnings, in receiving education. However, practical exercise of these rights is significantly hampered, so that the overall social status of women is less favourable than that of men. Well-paid jobs and decision-making positions are less available for women, even though women are usually more educated. The conditions in which women work are often worse than the conditions in which men work. Although women in some sectors make up more than 60% of employees, their salaries are 20% lower than men’s. (European Movement in Montenegro, 2011). A specific problem is mobbing and sexual harassment, to which the system does not have an adequate response. There is a very small number of court proceedings and first the insensitivity of the judiciary is noticed, and then of other institutions. The results of the research conducted by the European Movement in Montenegro about the socio-economic position of women in 2013 show that women are predominantly recognized as victims of harassment at work among the population, but also among employers. A significantly higher number of women (63%) compared to men (53%) believe that victims of harassment at work are most often women.

1 The goal of these actions is to exclude the employees from the collective, either by deciding to leave it due to unbearable pressure or by being fired at the very end of the process in which he exhausts all his work resources (Vulekić, 2015, 6). By emphasizing the psychological nature of harassment at work, its negative consequences for the health and well-being of employees and specific dynamics of the phenomenon that puts the victim in an inferior position, Brodsky’s work can be considered as pioneering in this field (Einarsen et al., 2011, 7; Einarsen et al., 2008; cf. Vulekić, 2015, 6).

2 The reason for this may lay in the fact that Brodsky was not particularly interested in a direct or separate analysis of this phenomenon which he treated equally as other sources of stress in the work environment such as exhaustion due to shift work and accidents at work (Leymann, 1996).

3 It is believed that Leymann has taken it from doctor Hyneman who used it in order to describe aggressive behaviour of a group of schoolboys who attack a lonely peer (Matthiesen, 2006, 5). However, the term mobbing is for the first time related to the book by Konrad Lorenz “On aggression” (1966). In that book, a famous ethologist describes the behavior of social animals (small birds) which join together in order to be able to send away a lonely predator from their territory who jeopardizes their safety. Similar behavior of people in work environment was named mobbing by Lemann’s scientific references, we can find different terms to mark the behaviors by which colleagues, superiors or subordinates maltreat the employees in the workplace (Petrović et al., 2014, 188).

4 Similar terminology can be found in other studies on this phenomenon (Zapf, 1999, 70; Einarsen et al., 2011, 15; Karabulut, 2016, 5).

DEFINING MOBBING

Mobbing is defined as an unfriendly communication which is directed from one or several individuals towards, mainly, one individual who, due to mobbing, finds himself in a position where he/she is helpless and unable to defend himself/herself, and held in it by constant mobbing activities (Leymann, 1990, 120; Leymann, 1996, 2; Einarsen et al., 2011, 15; cf. Karabulut, 2016, 5). Those activities are performed with high frequency (at least once a week) and for longer period (at least 6 months) (Leymann, 1990, 120; Kostelić-Martić, 2005, 11; Akar et al., 2011, 179). Frequency and duration are two crucial dimensions of mobbing (Leymann, 1990, 120; Zapf & Einarsen, 2003, 246; Akar et al., 2011, 179), and due to high frequency and longer duration, bullying can result in significant mental, psychosomatic and social consequences (Leymann, 1990, 121; Vartia, 2001, 66; Demirag & Ciftci, 2017, 2; Tatar & Yuksel, 2019, 57).

CAUSES OF MOBBING

Some of the causes of mobbing are interpersonal conflicts at work which are related to inappropriate organization and process of work, conditions in the work environment, inappropriate methods, uncertainty regarding job prospects, frequent changes in working conditions, frequent assignment to other duties, lack of support and inappropriate work environment (Rodić, 2015, 9). Mobbing can also arise from pointing out the illegality of the employer's work, i.e. pointing out corruption, which causes the employer's reaction in the form of mobbing. Mobbing also occurs as the consequence of disturbed interpersonal relations, namely it arises from unresolved conflict among the employees, inadequate work organization, as well as due to a collective labour dispute between the employees and their organizations and the employer (management). In a certain way, the growth of mobbing is conditioned by the processes of globalization and liberalization, i.e. by undermining the values of European social model of which the concept of social market economy and the concept of socially responsible management are an integral part. Especially in the conditions of transition in the countries of the former socialist system, unfavourable preconditions are created for the spread of mobbing, a cruel, inhumane, socially irresponsible managerial policy in order to

force employees to terminate employment contracts, whereby the employer avoids legal obligations in collective redundancy and payment of severance pay (Lubarda, 2008a, 5).

FORMS OF MOBBING

Mobbing is exclusively related to social interactions among employees, independently from their hierarchical level (Šimić et al., 2015, 306).⁵ Mobbing occurs in two basic forms, according to Branko Lubarda, horizontal and vertical mobbing, with many varieties. Horizontal mobbing comes from an employee or employees directed against another employee in the same or similar workplaces, where there is no subordinate relationship between the mobber and the mobbing victim (Lubarda, 2008a, 9). Very often it occurs as a result of unfair professional competition accompanied by envy, jealousy and similar human weaknesses (Rodić, 2015, 16; Arnejčić, 2016, 241; Karabulut, 2016, 7; Demirag & Ciftci, 2017, 2). According to Vesna Rodić, horizontal mobbing manifests itself in milder forms, such as constant jokes, ridicule at the expense of speech, posture, gait, clothing, private life etc. (Rodić, 2015, 11). However, it can also appear in more severe forms, such as spreading slander regarding professional and private life (e.g. fabricating sexual intrigues), continuous interruption in speech, avoiding socializing during work breaks, not inviting to social activities (Leymann, 1990, 120; Cornoiu & Gyorgy, 2013, 709; Arnejčić, 2016, 241; Demirag & Ciftci, 2017, 2).

Vertical mobbing comes, according to Beno Arnejčić, from the immediate superior (lower or senior management, rarely from the executive director himself or main executive director – general director, where mobbing is executed by more employees who are given certain benefits by the management (promotion at work, professional training, etc.). Vertical mobbing can occur as a covert vertical mobbing, where it is hidden behind horizontal mobbing (Arnejčić, 2016, 241–242). Vertical mobbing occurs in the form of increased control of an employee's presence at work, in performance of job tasks, exposure to constant criticism from superiors due to (the alleged) omissions, through disparagement of professional competences, frequent assignment to other duties (with no justified reason), interruption in speech or an attempt to give explanations or dispute criticism, up to professional

⁵ It is important to stress that some authors only discuss mobbing at the hierarchical level (Rissi et al., 2016, 356; Kostelić-Martić, 2005, 16).

„ostracism“, avoidance or isolation of the employee⁶ (Rodić, 2015, 12; cf. Karabulut, 2016, 8; cf. Arnejčić, 2016, 240).

METHODS AND TYPES OF MOBBING

The situations in which employees are subjected to negative behaviours by their clients and parties do not fall into the realm of this phenomenon. Some of the methods of harassment and abuse in the workplace are: spreading malicious gossips, insults, ridicule, publishing personal information, giving work tasks to someone who is known not to be able to perform them, failing to invite to meetings (Hillard, 2009, 47; Arnejčić, 2016, 247; Demirag & Ciftci, 2017, 2). Dieter Zapf, in his study *“Organisational, work group related and personal causes of mobbing/bullying at work”*, distinguishes seven types of mobbing: organizational, social isolation, attacks on the private sphere of life, verbal and physical aggression, spreading of rumours (Zapf, 1999, 71).

Mobbing also occurs in the form of provocation of the mobbing victim's reaction, in order for the mobbing victim to violate the Code of Conduct, i.e. to initiate disciplinary proceedings against the employee for insult, or even to provoke a quarrel or resort to violence at work (Rodić, 2015, 13). Mobbing also occurs in a number of other varieties, where mobbing techniques are usually less subtle towards the employees with lower qualifications but subtler (harder to grasp) towards the employees with high or expert qualifications, which can be explained with a phrase *“the better the job, the subtler the terror”* (Koić et al., 2003, 14; cf. Cornoiu & Gyorgy, 2013, 711). Mobbing goes so far in the practice that there is the case where the employer, through his associates, subordinates, organizes to find some compromising material on the desk in the office of the employee, a mobbing victim, which should present the employee as an unprofessional or immoral person (Lubarda, 2008b, 6). Having said this, the mobbing as a process can be divided into stages or phases.

MOBBING PHASES AND CONSEQUENCES OF MOBBING

There are several classifications of mobbing phases (Leymann, 1990, 122; Leyman & Guvstasson 1996; Ege, 2000). However, they are mostly based on initial

Leyman's classification (Leymann, 1990, 122) which is the reason for using this particular classification as groundwork also for this research.⁷

Phase 1: The Original Critical Incident

As regards the investigated situations, it is known that the triggering situation most often observed is a conflict (usually over work); but not much is known in detail about critical incidents and other probable triggering states in working life. Hypothetically, this phase is very short and the next phase commences as soon as the focused person's workmates and management reveal stigmatizing actions. In Leymann's case study, was envy over his wages (Leymann, 1990, 122).

Phase 2: Mobbing and Stigmatizing

Many of the communicative actions which can be observed occur fairly often in everyday life. But within the framework of the harassment phenomenon, they have an injurious effect, as these actions are used consistently and systematically over a long period, with the intention of causing damage (or putting someone out of action). All the observed actions have the common denominator of being based on the desire to “get at a person” or punish him/her. Thus, manipulation is the main characteristic of the event. What is shown to be manipulated is:

1. The victim's reputation (rumour mongering, slandering, holding up to ridicule).
2. Communication toward the victim (the victim is not allowed to express him/herself, no one is speaking to him or her, continual loud-voiced criticism and meaningful glances).
3. The social circumstances (the victim is isolated, sent to Coventry).
4. The nature of or the possibility of performing in his/her work (no work given, humiliating or meaningless work tasks).
5. Violence and threats of violence (Leymann, 1990, 122).

However, during this second phase, the victim is quiet or is kept quiet about the mobbing at the work-

6 The studies show that there are two syndromes linked to vertical mobbing. The first is the syndrome of an “empty desk”– when an employee is denied to perform the tasks or he is given the tasks below his own professional level in order to violate his professional dignity. The second syndrome is reverse, namely “full desk”– when the employee is given too much work, which cannot be successfully incompleting during working hours (so he or she stays to work overtime, without being paid for that), which leads to excessive fatigue at work (Lubarda, 2008a, 5; Rodić, 2015, 12).

7 The same classification of mobbing phases is used also in recent studies (Arnejčić, 2016, 245; Cornoiu & Gyorgy, 2013, 71).

place,⁸ which makes it hard to detect the existence of mobbing (Arnejčić, 2016, 245; cf. Demirag & Ciftci, 2017; cf. Khoo, 2016, 61–67). The victim tends to become isolated; their performance and quality of service drops and they experience stress, several psychosomatic disorders⁹ and burnout (Ćurčić, 2015, 25).

It happens that the victim of mobbing unjustifiably suspects or complains to other employees (who are not involved in mobbing), which causes stress to other employees. The victim of mobbing tries to eliminate mobbing by flattering the employer, as a kind of a defence mechanism (fight of flight mode), thus contributing to the loss of self-esteem and dignity. Due to mobbing, communication in the work environment becomes unfriendly (Niedl, 1996). Mobbing gradually leads to weakening of motivation, fatigue, i.e. exhaustion (burn-out syndrome), which is reflected in productivity at work, absenteeism (Einarsen, 2000, 387; Riethof & Bob, 2019, 382; Cornoiu & Gyorgy, 2013, 711; Petrović et al., 2014, 186), counter-productive behaviours such as destruction of the organization's assets, deliberate sabotage of work tasks (Ayoko et al., 2003, 85), and drop in productivity (Einarsen, 2009, 387).

Phase 3: Personnel management

When management steps in, the case becomes officially a "case." In the research mentioned above it has been shown that, during this phase, people can be confronted with serious violations of justice. Management tends to take over the prejudices of the victim's workmates. This is one of the outcomes of the mobbing situation, which turns the person into a marked individual. Those around regularly assume that the cause of the problem lies in the deviant personality of the victim (that is, one observes the victim's defensive

behaviour and from that draws the conclusion that the victim is suffering from a personality problem).¹⁰ The situation is complicated since personnel administration is governed by different working environment legislation in different countries, with the notion of what constitutes a violation varying according to the applicable law (Leymann, 1990, 122).

Phase 4: Expulsion

As far as the mobbing scenario at workplaces is concerned, one knows quite well what social circumstances people end up in, when they have been expelled from working life. In the Scandinavian countries, the most dangerous situations that give rise to further stigmatizing are long-term sick leave, no work provided (but still employed), relocation to degrading work tasks, and psychiatric treatment. The subject in Leymann's case study suffered from psychosomatic problems because of his treatment, went on the sick leave, defended himself aggressively against his assailants, became a *persona non grata* and ended up in a situation where it became increasingly difficult for him to find new work, as staff departments usually ring each other to obtain references about applicants for jobs.¹¹ (Leymann, 1990, 122).

Within the case studies, greater research attention has been paid to individual consequences of mobbing than organizational ones (Sperry & Duffy, 2007; Hoel et al., 2011; Høgh et al., 2012). Recent studies indicate that the connection between exposure to harassment at work and personal well-being indicators is somewhat lower than correlations between the harassment and indicators of work behaviours that are rather detrimental to the organization (Zapf & Einarsen, 2003; Einarsen et al., 2009; Akar et al., 2011; Petrović et al., 2014).

8 The studies have shown that in companies run by dictators, employees show two types of reactions: some accept that they are victims of mobbing while other develop certain forms of ingratiation, a kind of a defence mechanism. Both groups tend to develop health disorders. In such an atmosphere, productivity drops, and capable ones and employees with new ideas are the most common target of mobbers (McCord & Richardson, 2001, 2; Petrović, 2014, 91; Demirag & Ciftci, 2017, 2).

9 Studies within social psychology have identified psychological reactions to mobbing, as well as very biological reactions such as an increase of adrenaline in the body. Mobbing results in developing the sense of frustration, as well as inability to solve problems at work, i.e. inability to find the answers in order to eliminate mobbing, which also causes the sense of helplessness, particularly because the consequence of mobbing is a certain loss of professional reputation and a sense of deep damage to personal integrity and dignity (Deluga & Masson, according to Koić et al., 2003, 14–15).

10 An individual's experience suggesting that harassment at work is tolerated and accepted in some organization can be a consequence of the existence of a specific, negative work climate that implicitly sends the message to the individual that he or she must either adapt or leave (Salin, 2003, 1220; cf. Richman et al., 2004, 18; cf. Larrazabal et al., 2019, 9; cf. Cortina, 2015, 1). In that way, such a harassment is not only an isolated incident, but a signal that such behaviours are accepted, taken as usual and that they will not be addressed. It is hard to say where the attacker's desire to cause harm begins and where the ruthlessness of the employer who sees the situation as a common method of achieving work efficiency, ends (Parzefall & Salin, 2010, 764). In such organizations, harassment at work is also treated as part of a culture in which aggressive behaviour is awarded and an attempt to characterize that behaviour as harassment, i.e. to report it, is seen as a reflection of disloyalty (Salin, 2003, 1221; Cortina, 2015, 1).

11 The consequences of mobbing can be disastrous for both the victim and the collective. The studies show that intrigue, undermining and humiliation with the aim of eliminating the undesirable one from the collective consumes more energy than the work itself (Nielsen et al., 2012, 42; Tatar & Yüksel, 2019, 60).

Abuse at work leaves consequences which are visible in work context, in order for them to be later extended to other spheres of life of an individual. Leymann's research relates the first phases of abuse to the conflicts and stigmatization in work environment and the latest phases of abuse sees in disabling of the individual professional and personal resource and finally its exclusion from labour market. The victim through negative treatment in work organization and out of it (family, social and health services) develops the feeling of incompetence, and thus due to stigmatization that accompanies some other consequences of abuse, and those are: many periods of sick leave over the years, discreditable transfers to other work, social isolation, employment without any real work to do, as well as ignominious psychiatric examinations and diagnoses (Leymann, 1990, 122).

Consequences of mobbing for an individual can be of health, psychological, psychosomatic, economic, social and legal nature. Most frequent consequences of mobbing are burnout syndrome, reactive depressive states of post-traumatic stress disorder (Nielsen et al., 2012, 42; Tatar & Yüksel, 2019, 60; Riethof & Bob, 2019, 382). The results of these research are compatible with results of more recent studies (Tuckey et al., 2010; Ciby & Raya, 2014; Bonde et al., 2016).

Negative consequences of mobbing at work are expressed and they affect also partners and children due to the ripple effect, and take a toll on family relations. Mobbing leads to the impairment of social position, reputation ("social misery"), it also has direct wider harmful social consequences, since it leads to the impairment of the value system and ethical standards in social relations, and it jeopardizes family cohesion as well (Sperry & Duffy, 2007, 400; Gyorgy & Cornoiu, 2013, 711). The consequences of mobbing are also reflected in social relations of mobbing victims (Khoo, 2010; Sperry & Duffy, 2007, 400). Victims very often withdraw and isolate themselves which results in the loss of friends (Khoo, 2010, 64). Also, friends cannot listen about the same problem day in day out. Possible dismissal leaves the victim with no income, and searching for a new job can last for a long time due to the poor health condition of the victim. Economic consequences of mobbing are manifested in the damage that the employer (company) suffers due to the costs of payment of benefits during the temporary inability to work – sick leave (Lubarda, 2008a, 9–10; Rodić, 2015, 22; Gyorgy & Cornoiu, 2013, 711; Szare & Szarek, 2018, 256). Directly, employer suffers damage due to reduced productivity of work of the employee that was the target of mobbing, reduction of motivation at work, loss of innovating motivation or other initiatives of the victims of mobbing (Akar et al., 2011). Paid sick

leave due to illnesses caused by mobbing has its financial consequences to the health system and pension and disability insurance system (Hoel et al., 2001; Davenport et al., 2003, 146–148).

RECENT STUDIES ON MOBBING THAT MOTIVATED THIS RESEARCH

In recent studies, there has been a tendency for research into mobbing to expand beyond the records of its factors and consequences in order to gain insight into its complex dynamics and thus achieve a better understanding of this phenomenon. In that regard, researchers began examining mobbing within the known models of aggression at work and data analysis (Brees et al., 2013; Douglas et al., 2008; Samnani et al., 2013), by exploring the ways of experiencing abuse or negative actions (Rodríguez-Carballeira et al., 2010; Vie et al., 2011), reviewing previously valid and widely accepted methodology (Nielsen et al., 2013; Notelaers & Einarsen, 2013, 670–682), or by trying to understand the difference between harassment at work and similar phenomena by analyzing defining characteristics of abuse (Hershcovis, 2011).

The studies carried out in different countries show variations in the frequency of mobbing which are the reflection of differences in tolerance to different forms of abuse. In 2002, in Croatia, a greater study on mobbing was carried out by the company "Media Metar" among city population of Zagreb. The sample included 700 respondents (49% female and 51% males). The study was carried out by the survey method, and a significant percentage of the respondents (from 15,4% to 53,4%) recognized the existence of this problem in the workplace and they attributed to it a feeling of mental (from 37,7% to 54,8%) and physical fatigue (from 30,5 % to 79,4%) (Koić et al., 2003, 108). Despite numerous studies, we cannot yet say with certainty why frequency of mobbing activities is higher in some organizations than in some others. There seems to be a higher risk in organizations dealing with administrative tasks than in manufacturing companies, which can be explained by the fact that in manufacturing activities, work tasks and roles are more clearly defined.

Studies also confirm higher frequency of mobbing in healthcare institutions, educational institutions and non-profit sector (Ozturk & Yilmaz, 2008). In the healthcare sector, nurses are exposed to mobbing more than other professionals (Ozturk & Yilmaz, 2008, 38). The growing competitiveness of health workers, changed dynamics of work and the "macho management" style in the healthcare system create a culture of behaviour that is favourable for the development of mobbing (Field, 2003;

cf. Beganlić et al., 2009). The results of the study carried out by the authors Aytolan and Dilek (2007, 1446) on a sample of 505 nurses show that feelings of fatigue and stress, headache, gastrointestinal symptoms and different emotional reactions are most common reactions to mobbing, while about 22% of nurses and technicians that have experienced mobbing have used sick leave to reduce the stress. In order to avoid mobbing, 72,1% of nurses work harder and put a lot of effort, while about 10% of them sometimes think about suicide due to their mobbing experience, however health status of a person could depend on variation of strategies of facing with this stressor (Aytolan & Dilek, 2007, 1450).

A study on the impact of mobbing on the inability to work in nurses was conducted in Serbia in 2009. The case study was carried out on a sample of 300 respondents of paramedical staff. And it showed that most common somatic symptoms included nausea, headache and fatigue. All the somatic symptoms in those who reported mobbing were statistically significantly different from the symptoms of those who have not. Most common mental symptoms were decrease in motivation (59 %), feeling of rage/anger (49%) and loss of confidence (41%). Study was carried out by Azijada Beganlić and associates and it points out that more than a half of nurses and technicians were exposed to mobbing, while 24% were persistently exposed to this form of harassment (Beganlić et al., 2009, 1–6).

Another study, carried out by Franka Krajnović and associates in 2007, was conducted on a sample of 1.354 nurses and technicians employed in health care institutions of various types, in 21 counties in Croatia. It showed that half of the respondents complained about negative experiences at work. The most frequent negative behaviour they reported was humiliation, yelling, insulting, giving privileges to certain members of the team within distribution of tasks, ignoring opinions and attitudes. The results obtained also indicate that negative behaviours result from stressful working conditions and organizational problems, as well as deficient communication skills (Krajnović et al., 2007, 70).

In Serbia, the research on mobbing began after democratic changes in 2000, thanks to the engaged professionals from the trade union. The union's efforts resulted in the enactment of the law on the harassment at work in 2010 (*Law on the Prevention of Harassment at Work*, "Off. Gazette of RS", no. 36/2010). Systematic study of this phenomenon by using standardized (comparative) methodol-

ogy in Serbia begins in 2009 (Čizmić & Vulekić, 2010; Petrović et al., 2014). The popularity of this concept throughout the world is reflected in its presence on the Internet, both in the documents on Internet pages that are available to general public, and in those reserved for researchers and scientists. The EMIC Association - Educational, Marketing, Information Centre was founded in late 2011 with the aim of examine this, very negative phenomenon in society (in the workplace), to draw public attention, with the ultimate goal to eradicate it.¹²

It is difficult to obtain precise data on the prevalence of this phenomenon in Montenegro. In Montenegro, there is only one study on mobbing that was carried out by Public Opinion Research Agency "Damar" from Podgorica,¹³ that was financed by the Ministry of Labour and Social Welfare. The study was carried out on a sample of 503 employees and employers in 2017. As results show, 58,5% of respondents stated that personal experiences of mobbing affected the loss of their work motivation. Furthermore, 52,8% reported that the main reasons for the occurrence of mobbing are mobbers' personal characteristics. As the state is the largest employer, over 90% of cases of the so-called vertical mobbing (when superior abuses subordinate worker) occurs in the state administration and public revenues bodies.¹⁴ However, recent studies indicate that the mobbing is more frequent in private sector as opposed to the public sector (Lubarda, 2008a, 5).

THE RESEARCH OF PERCEPTION AND COPING WITH MOBBING IN WOMEN OF MONTENEGRO

The main aim of the research was to examine perception of different types of mobbing and coping with mobbing among women employed in private and public sector in Montenegro. In line with the aim of the research, the following hypotheses have been set:

- **Hypothesis 1:** It is assumed that within the groups there is a statistically significant correlation between years of service of female respondents and perception of mobbing by the part of superior.
- **Hypothesis 2:** It is assumed that attitudes of nurses on mobbing will be so structured that one can talk about certain types of mobbing.
- **Hypothesis 3:** It is assumed that groups examined will be significantly different in their perception of types and frequency of mobbing.

¹² <https://mobing.rs/udruzenje-stop-mobing/> (last access: 19. 12. 2019).

¹³ www.damar.co.me (last access: 19. 12. 2019).

¹⁴ www.minradiss.gov.me mobing u Crnoj Gori Ministarstvo rada i socijalnog staranja (last access: 19. 12. 2019).

Table 1: Perception of mobbing by the superior and years of service: Questionnaire amongst the employees of Telekom.

Years of service	Perception of mobbing by the superior				Total	
	Yes		No			
	f	%	f	%	f	%
Up to 10 years	23	65,71	32	71,11	55	68,75
10 to 20 years	10	28,57	8	17,77	18	22,5
More than 20 years	2	5,72	5	11,11	7	8,75
Total	35	100	45	100	80	100

Sample of respondents

The research was carried out between June and December 2019. The study included 170 female respondents aged from 20 to 59 and it was carried out on two independent samples, more precisely: the sample of nurses employed in the Clinical Centre of Montenegro¹⁵ and a sample of 80 female employees in the private sector, i.e. telecommunications company – Telekom.¹⁶

The sample of nurses consisted of 90 nurses employed at the Clinical Centre of Montenegro (KCCG). It was a two-stage stratified sample. First-stage sampling units were individual departments. Three departments were randomly selected: the orthopaedic ward, the ophthalmology and internal medicine wards. In the second phase, the nurses working in these departments were randomly selected.

The sample of employees in Telecommunications Company – Telekom consisted of 80 women. The company was divided into 4 sectors in 2019. The sampling units of the first stage were all four sectors. Two sectors were randomly selected for research, namely: the commercial sector and IT sector and then 80 female employees were randomly selected from these two sectors.

Measuring instrument

The main measuring instrument of this study was a non-standardized questionnaire (see *Appendix*) which was constructed to examine mobbing and manners of dealing with mobbing. Questionnaire was filled out by respondents of different ages and length of service. As an auxiliary instrument for development of the

questionnaire, we used the Questionnaire for mobbing diagnosis (ISS – Questionario per la rilevazione del fenomeno "Mobbing") that was constructed by members of the Committee of mobbing investigation at the Public Health Institute of Rome.¹⁷ The task of the respondents was to assess the frequency of mobbing on a scale of 5 degrees (from 1 – never to 5 – very often). Higher result refers to experiencing more negative forms of behaviour in the workplace.

Procedure

After obtaining consent from competent institutions, the survey was carried out on several occasions in the premises of Clinical Centre in Podgorica and in the telecommunication company - Telekom. Head nurses of individual departments were asked to help conduct the research. Having explained the purpose of the survey, guaranteed discretion and motivated the respondents to cooperate, we moved on to the implementation of the instrument. The questionnaire was filled in independently, in the conditions of group testing. To ensure anonymity, questionnaires were distributed in envelopes. Survey in private sector was carried out in the premises of telecommunications company Telekom.

Methods of data analysis

In accordance with the goal and research hypotheses, there were several univariate and multivariate statistical-mathematical methods were applied. For the purpose of examining the structure of risk factors, Principal-components method of factor analysis was applied. Univariate and discriminant analysis was applied to examine structural differences between groups in the type and frequency of mobbing, there was applied discriminative analysis. Statistical and mathematical data analysis was performed using SPSS programme, version 17.0.

RESULTS

In order to examine whether there is a statistically significant correlation between the years of work experience and the perception of mobbing by superiors, we applied the statistical method of correlation. For this purpose, female respondents were divided into three groups. The first group consisted of respondents whose total length of service is less than 10 years, the second group were those whose total length of service is 10 to 20 years. Length of service of the third group was longer than 20 years.

15 There were in total 2300 employees in the Clinical Centre of Montenegro in 2019.

16 There were 548 employees in Telekom in 2019.

17 http://old.iss.it/binary/cpf_m/cont/ATTACH_15_Questionario_Mobbing.pdf (last access: 19. 12. 2019).

Table 2: Perception of mobbing by the superior and years of service: Questionnaire amongst nurses of Clinical Centre of Montenegro.

Years of service	Perception of mobbing by the superior				Total	
	Yes		No			
	f	%	f	%	f	%
Up to 10 years	13	26	17	42,5	30	33,4
10 to 20 years	18	36	11	27,5	29	32,2
More than 20 years	19	38	12	30	31	34,4
Total	50	100	40	100	90	100

When it comes to female respondents employed in private sector, the majority of them, i.e. 65,71% whose length of service is up to 10 years more frequently perceive mobbing by a superior than respondents who have a longer work experience. ($R = -0,85, p = 0,000$). (Table 1)

When it comes to female respondents employed in public sector, i.e. nurses, there is a statistically significant correlation between years of service and perception of mobbing. Respondents whose years of service was over 20 years, namely 28,57% of them most often perceived mobbing by the superior ($R = 0,322, p = 0,000$), followed by those whose length of service is from 10 to 20 years ($R = 0,52, p = 0,000$), while respondents with the smallest number of years of service perceived mobbing most rarely ($R = 0,18, p = 0,000$) (Table 2).

In order to examine correlation between nurses' attitudes about the perception of certain types of mobbing, we have applied factor analysis. Extracting latent dimensions (factors) enables the observation of several aspects at the same time. Factor analysis was applied to the sample of nurses. A scale of 21 variables (questions 10–30 from the questionnaire) describing the perception of mobbing was subjected to the factor analysis *Principal Components Analysis*. By scale factorization we wanted to examine whether the attitudes are structured in such a manner that we can speak about specific dimensions of mobbing, or the attitudes are poorly related so that no specific structural features can be singled out. Factor analysis yielded four factors that together exhaust 64,989% of the total variance. Based on 20 manifest variables (particles) there were 4 factors extracted of which first two factors are particularly interpretable and more significant (Table 3).

Conventionally, we have determined statistically significant factor loadings, those above 0,500.

Table 3: Characteristic roots and the variance percentage.

Characteristic values $\lambda \geq 1$	Percentage of common variance	Cumulative variance
9,706	37,715	37,534
2,539	9,867	49,149
1,358	9,806	58,326
1,159	6,188	64,989

In that way, we wanted to obtain a simpler factor structure. Of all the four factors that have set aside, the first factor has the largest number of variables with loadings above 0,500.

Table 4 shows the structure of 4 factors extracted by the principle of the size of characteristic values $\lambda \geq 1$.

The first factor points to the structural connection of those claims that refer to personality attacks and ridicule. This factor is called "a personality attack". ('They refuse to cooperate with me', 'they send me offensive comments', 'they act as if I don't exist'). This factor explains 37,534% of the total variance. On the first factor with the load above 0,800, 4 claims were singled out, more precisely: 43 rejections to cooperate (0,744); offensive comments (0,722); 42 – they act as if I don't exist.

The second factor is composed of variables relating to attacks on work activity. This factor was called "the attack on work activity" ('I am assigned meaningless tasks', 'Given my actual work performance, my work has been judged unrealistically badly'). This factor explains 49,149% of the total variance. The structure of the second factor suggests that nurses perceive direct attacks on work more frequently.

The third factor is presented by variables that refer to exposure to constant unsubstantiated criticism and humiliation in front of a superior. This factor was called "humiliation in front of the superior". In case of this factor with highest saturations, there were two statements that set aside. ('I am exposed to constant unsubstantiated criticism', 'They humiliate me in front of the superior').

At the fourth factor with a load over 0,600, only one variable, which involved verbal sexual harassment and unwanted sexual attention, was singled out and thus is called "sexual harassment" (e.g. 'They touch me unnecessarily', 'They suggest having sexual intercourse', 'They invite me to dating', 'They stand too close to me'). This factor only explains 6,188%. We came from the assumption that this was a sensitive subject, so the respondents didn't talk much about these issues.

Table 4: Matrix of factor model.

Variable	Factor 1	Factor 2	Factor 3	Factor 4
Refusing to cooperate	0,854	-0,297		0,102
Offensive comments	0,820	-0,222	0,229	0,159
They act as if I don't exist	0,819	-0,211	0,322	
Ridicule	0,817	-,263		
Not including in social activities	0,781	-,201		
Offensive jokes	0,775	-,213		
Exclusion and isolation	0,760	-,250	-0,271	
Comments related to religious and party affiliations	0,750	-,176	0,231	0,192
Physical isolation with no possibility for communication	0,737	-0,123	-0,176	0,126
Humiliation in front of the superior	0,693	-0,118	0,524	0,134
Ridicule of family members	0,676	0,285	-0,405	
Assigning meaningless tasks	0,637	0,554	0,118	
Attributing my merits to others	0,628	0,567	0,188	
Exposure to constant, unsubstantiated criticism	0,615		0,586	0,104
Performance appraisal is unrealistically poor	0,612	0,424	0,174	
They look into my phone calls	0,603	0,462		0,236
Assigning tasks inappropriate to health condition	0,569	0,347	0,126	0,416
Mobbing by the superior	0,542	0,575	0,141	0,116
Suggesting intimate contacts	0,444	0,574	0,290	0,806
Unnecessary touching	0,195	-0,104	0,148	0,806

Table 5: Characteristic roots and the variance percentage.

Function	Characteristic value	Variance percentage	Canonical correlation	Wilks' Lambda	Chi-square	df	Significance
1	0,82	100,0	0,526	0,724	21,322	4	0,000

Results of discriminant analysis

In order to examine whether there was a statistically significant difference between the groups regarding their perception of forms and frequency of mobbing, we conducted a discriminant analysis. The analysis included 21 variables from the research questionnaire (questions 10 to 31 of the questionnaire). Discriminant analysis was applied to both samples from our study. As our research involves two independent samples, we set aside one common discriminant function. By analyzing common discriminant function, we found that it completely separated the group of nurses from the group of women employed in private

sector. One common discriminant function of extremely high discriminant power and levels of significance has been shown to be obtained ($p=0.000$) (see Table 5).

The height of the characteristic root $\lambda = 8,487$. Canonical correlation between the set of variables and variable of grouping is high and it is $R = 0,946$. High value of the coefficient of canonical correlation speaks about high discriminant power of the function mentioned. Wilks' Lambda is 0,105. Significance of Wilks' Lambda is evaluated by Chi-square test $\chi^2 = 569,37$ (Table 5). The difference between the group of nurses and the group of women employed in telecommunication company is at the extremely high level of statistical significance which

Table 6: Matrix of the structure of canonical discriminant function.

Variable	* Function 1	** Function 1
Offensive jokes	0,510	0,704
Offensive comments related to religious and party affiliations	0,467	0,465
Exclusion and isolation	0,498	0,573
Ridicule of family members	0,398	0,977
They act as if I don't exist	0,310	0,090
Physical isolation with no possibility for communication	0,291	-0,928
Refusing to cooperate	0,267	0,147
Offensive comments	0,221	-0,590
Humiliation in front of the superior	0,214	0,249
Ridicule	0,171	-0,396
Not including in social activities	0,153	0,267
Looking into my phone calls	0,153	-0,454
Tasks inappropriate to health condition	0,122	-0,120
Exposure to constant, unsubstantiated criticism	0,118	0,225
Performance appraisal is unrealistically poor	0,110	0,095
Attributing my credits to others	0,084	-0,202
Assigning meaningless tasks	0,057	0,034
Mobbing by the superior	0,053	0,034
Touching	-0,034	-,267
Proposing intimate contacts	-0,062	0,203

* Standard coefficients of canonical discriminant function

** Correlation coefficients of variables and common discriminant functions

can be observed from the matrix¹⁸ of the structure of common discriminant function (see Table 5.)

The results obtained by the discriminant analysis show that overall discrimination of variables is high. In further analysis we wanted to examine which individual variables discriminate the groups best. Conventionally, we have determined the values above 0,500 as statistically significant loads in the matrix of discriminant function structure (Table 6).

The variables that best discriminate the groups are:

- Offensive jokes (0,590)
- Offensive comments related to religious and party affiliations (0,513)
- Exclusion and isolation (0,487).

Four variables have set aside on a common discriminant function (Table 6). The least discriminant power

was found with the following variables: mobbing of female colleagues and touching. On the basis of the loads presented in discriminant factor analysis we can conclude that nurses differ from respondents employed in private sector by the fact that they significantly more often perceive offensive jokes, offensive comments related to religious and party affiliations, as well as exclusion and isolation.

DISCUSSION

The goal of the study was to examine perception of type and frequency of mobbing in nurses employed at the Clinical Centre of Montenegro and female employees in the telecommunications company – Telekom. The first hypothesis concerned the expectation that there will be statistically significant positive correlation between the years of service of female respondents

¹⁸ Discriminant function is here more freely interpreted as a discriminant factor.

and the perception of mobbing by the superior. This hypothesis is partially confirmed, only when it comes to nurses. The results obtained showed that nurses with 10 to 20 years of service experience mobbing by a superior more frequently than respondents with less than 10 or more than 20 years of service. The results obtained are compatible with the results of the research conducted by Krajnović and his associates (Krajnović et al., 2007; Šimić et al., 2015, 313) who showed that nurses with 11 to 30 years of service more frequently experience yelling, insulting, as well as the privileges of individual team members in their work environment. Weaker perception of mobbing in case of female respondents with shorter years of service can be explained by the fact that they also experience attacks in their working environment, but they consider it an integral part of their job and thus they are more tolerant than their older colleagues. Having in mind that they are at the beginning of their work career and on the other hand there is a fear from losing the job, they are not sincere in their answers. Our findings are not consistent with the results of some studies (Zapf & Einarsen, 2005, 237–270; Yildirim, 2009; Einarsen & Skogstad, 1996) showing that nurses with shorter work experience are more likely to be directly attacked and negatively treated in their work environment, because due to the excessive workload, time constraints, and insufficient experience, they are not able to perform their tasks professionally and on time.

The second hypothesis of the study concerned the expectation that the attitudes of nurses on types of mobbing will be so structured that they make certain types, which as such have a predictive importance in occurrence of mobbing as such. We have confirmed this hypothesis by analysing data through a multivariate statistical method of factor analysis. Four factors that are of great importance in the prediction of mobbing have been extracted by factor analysis, namely: a personality attack, attack on work activity, humiliation in front of the superior and sexual harassment. The factor of personality attack has the greatest significance in the prediction of mobbing. The results obtained show that respondents from our sample most often perceive the attack on personality, which is in consistency with previous research results (Leymann, 1996; Vulekić, 2015, 125; Spector, Zhou & Che, 2014), but they accept such actions that can be explained even by the specific characteristics of our cultural milieu. Because of a specific manner of socialization, women are more prone to accepting the role of a victim. Women judge those actions as personally more difficult, but they are better in accepting them than men. The results obtained are consistent with the results of the Volakis's research (Vulekić, 2015, 125), which indicate that employees judge direct attacks on personality and physical integrity as the most difficult, least controllable and least acceptable in the work environment. The results our

study obtained also show that nurses are exposed to constant unsubstantiated criticism and humiliation. When it comes to sexual harassment, the respondents from our sample perceive physical and verbal sexual harassment and unwanted sexual attention, such as: unnecessary touching, proposing intimate contacts, and offensive jokes with sexual connotation. The obtained data are in accordance with the data in the literature (Valente & Bullough, 2004; Locke, 2019). Our findings show that 52.8% of nurses were sexually abused by doctors, 33.4% by colleagues, and 13.8% by patients, which is in consistency with the results of a study by Kahsay et al. (2020). These authors point out in their study that 41.12% of nurses were sexually abused by doctors. Montenegrin culture is characterized by high collectivism, high distance of power, restraint, and intolerance of insecurity. Professional relationships are often treated as familiar, hierarchy is strictly respected and thus the superiors are not expected to justify their decisions and behaviours, regardless of whether they are ethical or unethical.

The third hypothesis of the study concerned the expectation that statistically significant differences between public and private sector respondents with regard to the perception of the types of mobbing will be shown. The third hypothesis was confirmed by the analysis of data through discriminant analysis. Discriminant function has been shown to significantly separate groups. It is defined by the dimension of offensive jokes and there is a significant difference between the groups examined. In addition to this dimension, groups are significantly discriminated by the following variables: offensive comments related to religious and party affiliations, exclusion and isolation. These negative behaviours obtained by the study can be attributed to stressful work conditions, teamwork, lack of communication skills, racing for privileges of some team members within tasks distribution.

The results of the study show that respondents from the public sector are significantly more exposed to negative actions at work than those employed in private sector, which can be explained by the fact that nurses work more often in stressful conditions, in a team, with a lack of communication skills, racing for privileges of some team members within tasks distribution. This finding is consistently shown in the studies (Zapf et al., 2011, 163; Šimić, et al., 2013, 510). Employees in the telecommunications sector, unlike public sector employees most often perform their work independently in specific working and market circumstances in which their competences are rather highly valued. Some studies show that employees from private organizations are significantly more exposed to negative work practices than employees from public sector (Đorđević, 2013; cf. Vulekić, 2015, 4; Čizmić & Vulekić, 2010; Einarsen, 2000). This is explained by different regulations dealing with employment in private companies (short-term

employment contracts), a lower representation of Labour union with a protective function, and a different way of rewarding and promoting employees (Vulekić, 2015, 31).

The constraint of this study is also that the study was carried out on samples of female population and thus the results obtained are constrained by gender. The question remains if men perceive mobbing in some different way. Further studies should verify whether men cope with this stressor in the same or some other manner. On the other hand, studies have also shown, that the abusers use mobbing as a form of “exhaust valve” by which they conceal some kind of helplessness in some other sphere of life of the employer – superior who thus creates around him a group in which he demonstrates his power and importance at the expense of the employee – victim of mobbing.

There is also a need to construct factor analysis of the measuring instrument to be controlled and measured on bigger samples of subject groups. When it comes to healthcare workers, mobbing should be examined also in departments with severely ill patients, as the severity of illnesses must also influence the stressors and perception of mobbing amongst the employees.

Factor structure of the constructed measuring instrument, in addition, should be verified on bigger samples of respondents. Multimodal approach in studying mobbing which includes and integrates different methods (e.g. interview, observation techniques, focus groups formation) (Cowie et al., 2002) could be a new approach in future scientific studies, as well as in clinical practice to detect the problems of mobbing in organizations. Future qualitative studies may be recommended for the detailed exploration of mobbing in the light of the descriptive data from our study.

CONCLUSION

The aim of the study was to examine perception of the type and frequency of occurrence of mobbing in female population in Montenegro. The results obtained have shown that there are statistically significant differences in perception of the types of mobbing when it comes to women employed in private and public sector. By factorization of scale it was shown that attack on personality, attack on work activity, humiliation in front of the superior and sexual harassment are the most significant dimensions of mobbing that have the highest predictive significance in occurrence of mobbing. The results obtained have shown the differences in experiencing different forms of mobbing with respect to the total years of service. The study shows that examination of the perception of mobbing is rather important for studying this phenomenon and has important implications to the development of the existing methodology. The involvement of organizational factors (e.g. organizational culture and climate) into future studies of the perception of mobbing would be of particular importance. Based on the results obtained from this research, it is possible to plan more complex and comprehensive research into the phenomenon of mobbing. The resulting differences between the groups examined point to the need of creating specific approaches to prevention and treatment of these problems. It is extremely important to address these issues in Montenegro through scientifically based prevention activities which include a continuous implementation of etiological studies, developmentally suitable, as well as the implementation of evaluation of the performance of implemented preventive interventions. A more successful prevention of this problem requires research that examines those factors which reduce the likelihood of occurrence of these problems.

Appendix

QUESTIONNAIRE

You are being asked to honestly answer all the questions. The questionnaire is anonymous. The information will be used exclusively for scientific purposes. None of the information will be used in a manner that would reveal your identity. This is why you are asked not to sign below.

Institution in which the questionnaire is used:

1. Gender: 1. Male 2. Female

2. Age: _____

3. Occupation:

4. Education level: _____

1. Primary education
2. Lower secondary education
3. Upper secondary education
4. Post-secondary non-tertiary education
5. Short-cycle tertiary education
6. Bachelor or equivalent
7. Master or equivalent

5. Marital status

1. single
2. married
3. divorced / separated
4. widowed
5. extramarital partnership

6. Work place title:

7. Years of service (in total):

8. Type of occupation at your current workplace:

9. Do you deem that you have been a victim of mobbing at your work place

1. Yes 2. No

	Very often	often	sometimes	rarely	never
10. I am being excluded and isolated at workplace					
11. I experience physical isolation and lack of communication with colleagues					
12. I am not being included in social activities and contacts					
13. Colleagues refuse too collaborate with me					
14. Colleagues act as if I do not exist					
15. I am being ridiculed at my workplace					
16. I am being the target of insulting comments					
17. I am being humiliated in front of colleagues and supervisors					
18. I am receiving offensive comments on accounts of my religious, political and sexual orientations					
19. I am a target of offensive jokes					
20. Members of my family are being ridiculed					
21. My telephone calls and my mail are being investigated					

22. What is the frequency of your work tasks being inappropriate for your health condition?

1. very often
2. often
3. sometimes
4. rarely
5. never

23. I am a target of unsubstantiated criticism.

1. very often
2. often
3. sometimes
4. rarely
5. never

24. Realistically considering my work efficiency, my performance is evaluated as extremely poor.

1. very often
2. often
3. sometimes
4. rarely
5. never

25. Other colleagues take credit for my work.

1. very often
2. often
3. sometimes
4. rarely
5. never

26. I am being assigned meaningless tasks.
1. very often
 2. often
 3. sometimes
 4. rarely
 5. never
27. Have you experienced mobbing from the superior
1. Once
 2. Several times
 3. Constantly
 4. Never
28. What type of inappropriateness was in question?
1. Physical
 2. Psychological
 3. Sexual

I have been a victim of sexual advancements	Very often	Often	Sometimes	Rarely	Never
29. I am being touched inappropriately					
30. I am being proposed sexual intercours					
31. I am being invited out					
32. They stand too close to me					

33. Have you experienced mobbing form your colleagues?
1. Once
 2. Several times
 3. Constantly
 4. Never
34. Does the mobbing effect your work activity and productivity?
1. Very often
 2. often
 3. sometimes
 4. rarely
 5. never
35. What is the most frequent reason you do not report mobbing:
- I am afraid of sanctions due to lack of legal protection
 - Nothing would change
 - I have no one to report the mobbing
 - I am afraid things would get worse
 - Other
36. Did the mobbing make you feel:
- Humiliated
 - Devalued
 - Degraded
 - I am nervous
 - I am losing my professional reputation
 - I am chronically tired
 - Other

PERCEPCIJA IN SOOČANJE Z MOBBINGOM NAD ŽENSKAMI V ČRNI GORI

Tatjana VUJOVIĆ

University of Montenegro, Faculty of Philosophy Nikšić, Department of Sociology, 81 400 Danila Bojovića bb Črna gora
e-mail: tanja_vujovic@yahoo.com

POVZETEK

Cilj raziskave je bil preučiti pecepcijo različnih oblik mobinga, njegove pogostosti in pojavnosti nad žensko populacijo v Črni gori. Dobljeni rezultati so pokazali, da obstajajo statistično pomembne razlike v percepciji različnih oblik mobinga nad ženskami zaposlenimi v privatnem in javnem sektorju. Rezultati raziskave so pokazali, da so anketiranke, zaposlene v javnem sektorju, bolj izpostavljene negativnim dejavnikom na delovnem mestu, v primerjavi z ženskami, zaposlenimi v privatnem sektorju. S faktorizacijo lestvice je prikazano, da so napad na osebnost, delovno sposobnost, nespoštovanje v pričo nadrejenega in spolno nadlegovanje najbolj pogostedimenzije mobinga, ki imajo najvišjo prediktivno vrednost pri pojavu mobinga. Ugotavljamo, da je raziskovanje percepcije mobinga pomembno za proučevanje tega pojava in ima pomembne implikacije za razvoj obstoječe metodologije. Na osnovi rezultatov študije se lahko načrtuje kompleksnejše pregledne študije o pojavu mobinga. Razlike v percepciji mobinga med raziskovanima skupinama žensk kažejo na potrebo po specifičnih pristopih za preventivo in odpravljanje mobinga. Zelo pomembno je, da se v Črni gori začnemo soočati z mobingom in vrednotenjem te problematike, s pomočjo znanstveno osnovanih preventivnih aktivnosti, ki bi vključevale znanstveno implementacijo razvojno primernih etioloških študij, kot tudi implementacijo evalvacije uspešnosti že implementiranih preventivnih ukrepov.

Ključne besede: mobing, ženske, privatni sektor, javni sektor, preventiva

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O VZPOSTAVITVI IZSELJENSKE ZAKONODAJE V KRALJEVINI SRBOV, HRVATOV IN SLOVENCEV

Aleksej KALC

ZRC SAZU, Inštitut za slovensko izseljenstvo in migracije, Novi trg 2, 1000 Ljubljana, Slovenija
e-mail: AKalc@zrc-sazu.si

IZVLEČEK

Prispevek ponuja vpogled v izseljensko vprašanje v Kraljevini Srbov, Hrvatov in Slovencev takoj po prvi svetovni vojni in značilnosti zakonodaje o izseljevanju, sprejete v letih 1921 in 1922. Predstavljene so okoliščine, v katerih je zakonodaja nastajala, in potrebe, nameni ter interesi, ki so jo navdihnili. Orisani so potek zakonodajnega procesa, področja zakonske ureditve in „izseljeniška služba“, državni aparat, pristojen za upravljanje izseljevanja in izvajanje migracijske politike. Predstavljeni so odzivi na novi migracijski red na Slovenskem in v slovenskih skupnostih v Ameriki. Nakazane so težave pri implementaciji zakonodaje in prilagajanje postopkov, ki so jih narekovala restriktivne politike v državah priseljevanja.

Ključne besede: Kraljevina Srbov, Hrvatov in Slovencev, mednarodne migracije, izseljenska zakonodaja, migracijska politika, migracijski nadzor

SULL'INTRODUZIONE DELLA LEGGE SULL'EMIGRAZIONE NEL REGNO DEI SERBI, CROATI E SLOVENI

SINTESI

L'articolo tratta della legislazione in materia di emigrazione adottata dal Regno dei Serbi, Croati e Sloveni nel 1921 e 1922. L'autore presenta le circostanze, le esigenze, gli interessi e gli scopi che ispirarono l'intervento giuridico, illustra l'andamento dell'iter legislativo, le caratteristiche del regime migratorio e il sistema amministrativo, incaricato della sua attuazione. Si sofferma poi sulle posizioni e le reazioni nei riguardi dell'intervento regolativo in Slovenia e tra le comunità slovene in America. Accenna in chiusura agli adattamenti procedurali e di indirizzo politico che furono indotti dall'avvento delle politiche restrittive negli stati di immigrazione.

Parole chiave: Regno dei Serbi, Croati e Sloveni, migrazioni internazionali, legge dell'emigrazione, politica migratoria, controllo delle migrazioni

UVOD

Decembra 1921 je Narodna skupščina Kraljevine SHS sprejela Zakon o izseljevanju. Zakon in predhodna Uredba o izseljevanju, ki jo je maja istega leta izdalo Ministrstvo za socialno politiko, sta v državi uvajala enovito izseljensko zakonodajo.¹ Normiranje migracijske problematike je veljalo za temeljno sestavino pravnega reda novonastale države, dejavnik integracije njenega državoupravnega sistema in udejanjanja njenega nacionalnega koncepta. Zakonodaja je izseljevanje pojmovala kot socialno, gospodarsko in politično-nacionalno vprašanje. Njena vodila so bila pravno varstvo in socialna zaščita jugoslovanskih izseljencev, uravnavanje migracij v prid gospodarskim interesom države in državljanov ter povezovanje jugoslovanskega nacionalnega elementa doma in po svetu v vzajemen jugoslovanski narodotvorni proces. Zakon je izseljevanje, priseljevanje in s selitvami povezane zadeve podrejal nadzoru in neposrednemu upravljanju države. V ta namen je bila vzpostavljena izseljenska služba – centraliziran upravni sistem in birokratski aparat, zadolžen za izvajanje migracijske zakonodaje in migracijske politike.

Vprašanje “migracijskega reda” predstavlja kompleksno in plodno raziskovalno polje za kontekstualizacijo migracij v širša zgodovinska dogajanja. To velja posebej za čas po prvi svetovni vojni, ko so migracije prodrle v ospredje nacionalnih politik. Tako je bilo tudi v prvi Jugoslaviji. “Matica” je takrat izoblikovala koncept svojega odnosa do migracij in izseljenstva, ki ga je po drugi vojni prevzela in nadaljevala socialistična Jugoslavija. Studije o izseljenskem vprašanju in migracijski politiki v prvi Jugoslaviji opozarjajo na številne implikacije tega v mnogih ozirih kontroverznega področja. Izpostavljajo tudi kontinuiteto osnovnih smernic, ne glede na politični sistem in ideološki predznak pred in povojne Jugoslavije (Brunnbauer, 2016). Ta prispevek se osredotoča na fazo oblikovanja in začetnega uvajanja migracijskega reda, ki je praktično nespremenjen obveljal do konca prve jugoslovanske države.

MEDNARODNE IN JUGOSLOVANSKE RAZMERE

Koncept jugoslovanske izseljenske zakonodaje je bil v skladu z duhom državnega intervencionizma na področju migracij, ki je po prvi svetovni vojni zavladal na mednarodni ravni. Vojna je pomenila prelomnico v dojemljanju migracij in spremembo v spremljanju migracijskih pojavov. Z njo je iz vojaških, varnostnih in ekonomskih razlogov

nastopila začasna ukinitvev, po njej pa opuščanje predvojnih liberalnih migracijskih režimov, ki so dovoljevali načeloma prosta premikanja in selitve med državami in kontinenti. Svoboda izseljevanja in priseljevanja je bila sicer tudi takrat podvržena omejitvam in regulativom, s katerimi so države migracijske procese usklajevale z različnimi interesi. Prevladovalo pa je načelo *laissez faire*, ki je selitve prepuščalo dinamikam liberalnega gospodarstva in zagotavljalo načeloma nemoten dostop delovne sile do transnacionalnih trgov dela. Izseljenske zakonodaje so imele pretežno policijski značaj, služile so predvsem zaščiti izseljencev pred izkoriščanjem objestne poslovne mašinerije, ki je skrbela za njihovo mobilizacijo in prevažanje preko oceana. Služile so tudi narodnogospodarskim koristim, predvsem podpiranju strateških panog kot je bila ladjarska industrija. Samo nekatere so dovoljevale neposredno vplivanje na migracijska dogajanja, povsem priložnostne pa so bile klavzule za uveljavljanje socialnih pravic izseljencev v državah gostiteljicah.

Po vojni so se razmere spremenile. Atlantske ekonomije je bilo konec in države so v imenu gospodarskega nacionalizma dvignile protekcionistične omejitve. Za zaščito nacionalnih trgov dela sta bila potrebna obvladovanje človeških virov in upravljanje delovnih migracij. V tem so se države preizkusile že med vojno, ko so prevzele vaje gospodarstva in logistike za zagotavljanje prepotrebne delovne sile. Boj za delovno silo pa je bil med interesnimi konflikti, ki so zanetili svetovni požar. Pod vplivom teh spoznanj, zahtev delavskih organizacij in strahu, ki ga je zasejala ruska revolucija, so na pariški mirovni konferenci ustanovili Mednarodno organizacijo dela (*International Labour Organization*). Nameni tega telesa, ki so ga navdihovala prizadevanja za socialni mir med podjetništvom in delavstvom, so bili regulacija pogojev dela na mednarodni ravni, racionalizacija mednarodnih delovnih migracij in zaščita pravic delavcev izseljencev izven njihove matične države. MOD je preko svoje Komisije za izseljevanje zasledovala nadnacionalno koordinacijo migracijskih gibanj. Prizadevanja za upravljanje migracij z mednarodno kooperacijo pa so se ob samovoljnih izbirah držav izjalovila. Na prekooceanskih relacijah so prevladali nacionalni interesi držav priseljevanja, ki so z ZDA na čelu uvedle bolj ali manj restriktivne vstopne pogoje. V Evropi, kjer so se mnoge države soočale hkrati z izseljevanjem in priseljevanjem, je prostor ostal odprt za dvostranske dogovore. Skupna imenovalca sprejemnih in izseljenskih držav sta bila popolna kontrola izseljevanj in priseljevanj ter kvalitativna

¹ Članek je nastal v okviru programske skupine *Narodna in kulturna identiteta slovenskega izseljenstva v kontekstu raziskovanja migracij* (P5-0070), ki jo financira ARRS.

selekcija migrantov. Države se niso omejevale samo na nadzorovanje, mnoge so neposredno ali prek pridruženih agencij delovale kot posrednice na mednarodnem trgu dela (Hasenau, 1991; Rass, 2012; Rosental, 2006).

Mlada jugoslovanska država se je od samega nastanka spopadala z vprašanji migracij in izseljenstva. Povojni čas so zaznamovala intenzivna gibanja, neposredno povezana z vojno in reorganizacijo politične geografije na ozemljih razpadlih cesarstev. Hkrati so se po večletni prekinitvi po že utečenih tirnicah obnovile ekonomske migracije. V ZDA, ki so bile primarni izseljenski cilj, se je iz Kraljevine SHS do konca 1921 izselilo več kot 22.000 oseb. Odhajali so ljudje, ki jih je prej zadržala vojna, so jih gnale težke poveljne razmere, številne so pritegnili družinski člani in ponovno aktivirane čezoceanske družbene mreže. Še močnejše in pred izseljenskim se je razživel povratni tok, saj se je iz preoceanskih dežel do leta 1921 vrnilo več kot 40.000 oseb (Iseljenska služba, 1926, 51, 53). Šlo je spet za odložene povratke in take, ki so jih spodbudili domovinski čut in ekonomske motivacije. V ZDA sta z zaključkom vojnega ekonomskega ciklusa nastopili gospodarska kriza in brezposelnost. Vrednost dolarja pa se je močno okrepila in znašala na jugoslovanskih tleh deset do trideset krat več kot pred vojno. Med povratniki ni manjkalo zato niti naturaliziranih izseljencev in njihovih potomcev (Karanović, 1978, 357–358; Kolar Dimitrijević, 2012; Kalc et al., 2020, 179).

Obojestranske selitve so od oblasti terjale vrsto organizacijskih, pravnih in socialnih ukrepov. Na prekomorskih poteh so bili izseljenci potrebni opore in zaščite pred najrazličnejšimi zlorabami. Preskrbeti jih je bilo treba s potnimi dokumenti in drugimi dovolili za ekspatriacijo oziroma povratek (Brunnbauer, 2016, 217–218; Đikanović, 2014, 84). Revni repatriiranci so potrebovali socialno pomoč, skrbeti je bilo treba za prvi sprejem povratnikov na jugoslovanskih tleh ipd.. Za vzdrževanje stikov z izseljenskimi skupnostmi, zagotavljanje pravnega varstva in uveljavljanje interesov v tujini je bilo treba usposobiti konzularna zastopstva in primerne birokratske službe. Iz izseljenstva so prihajali pozivi, naj domovina pohiti z reševanjem mnogoterih formalnih in praktičnih problemov. Šlo je tudi za status jugoslovanskih izseljenskih skupnosti kot državljanov in etnično-nacionalnih entitet v razmerju z državami gostiteljicami.

Nase so opozarjali tudi gospodarski vidiki. S povratniki in nakazili iz izseljenstva so v domovino prihajala znatna in za državo dragocena devizna sredstva. Tista iz ZDA so predstavljala največji delež tujih vlog v jugoslovanskih bankah, še večje pa je bilo premoženje jugoslovanskih izseljencev,

vloženo v ameriških denarnih zavodih (Druškovič, 1921; Iseljenska nedelja, 1933). Potrebni so bili ukrepi za lažji ter varnejši monetarni transfer, razpravljalo se je tudi o spodbujanju vračanja izseljencev, ki bi s svojimi gospodarskimi znanji in izkušnjami prispevali k pospeševanju družbenega in ekonomskega razvoja. Temeljnega pomena pa je bil odnos države do izseljevanja kot gospodarskega in socialnega vprašanja. V nasprotju s podonavsko monarhijo, ki je eksport delovne sile razumela kot postavko socialne politike, je novonastala jugoslovanska država zavzela načeloma odklonilno stališče do izseljevanja. Izhajala je iz predpostavke, da je treba narodnim silam priskrbeti življenjske pogoje na domačih tleh in jih vključiti v izgradnjo domovine. Tega pa ni bilo mogoče doseči v doglednem času, izseljevanje je ostajalo še naprej neizogibno in ga ni bilo mogoče odpraviti. Zato ga je bilo treba regulirati in upravljati v korist državljanov in države.

Glede na vse to je izseljensko vprašanje imelo tudi eminentno politični pomen, ker je migracijska politika sodila med sredstva narodotvornega procesa. Kraljevina SHS se je rodila iz želje treh narodov, ki so stopili na pot oblikovanja skupne države in etnično-nacionalnega "telesca". To "telo" je imelo transnacionalne razsežnosti in je poleg srbskega, hrvaškega in slovenskega prebivalstva na državnem ozemlju obsegalo 800.000 narodnih pripadnikov v izseljenstvu. Izseljenci so s politično in gmotno podporo konkretno prispevali k uresnitvi ideje o jugoslovanski državi (Čizmić, 1974). Interes in dolžnost države sta bila narediti iz izseljencev, ki so se izselili kot pripadniki drugih držav, Jugoslovane in jih povezati z matično domovino v vzajemno čezmejno nacionalno entiteto (Bartulica, 1929, 8).

Nova državna skupnost je bila, podobno kot na drugih, tudi na migracijskem področju notranje diferencirana. Posamezne narodne komponente so se razlikovale po obsegu predvojnih migracijskih gibanj in diaspor po svetu, izhajale pa so tudi izpod različnih migracijskih režimov. V Avstriji je prevladoval liberalni odnos do izseljevanja, področje ni bilo urejeno s specifičnim zakonom in država je problematiko obravnavala primarno z vidika javnega reda. Tudi v ogrski polovici monarhije je veljala svoboda izseljevanja, vendar je namenska izseljenska zakonodaja dopuščala tudi omejevanje in usmerjanje migracijskih tokov v korist narodnega gospodarstva. Obstajala je tudi izseljenska služba, pristojna za izseljenske zadeve, s središči v Budimpešti, Zagrebu in na Reki. V Srbiji je bila država izseljevanju izrazito nenaklonjena, zadrževala ga je z visokimi davki na potni list in drugimi omejevalnimi ukrepi, da bi preprečila odhajanje vojaških obveznikov in zagotavljala pripravljenost vojske

(Miletić, 2009, 56, 72–77, 85–88). Črna gora je imela množično izseljevanje in izseljensko zakonodajo, vendar je tudi tu država pojav obravnavala le s policijskega stališča (Iseljenička nedelja, 1933). Glede na tako raznolične "izkušnje" je bilo treba problematiko na novo opredeliti in jo postaviti v enotne pravne in organizacijske okvire. Kot na drugih področjih izgrajevanja upravnopolitičnega sistema je tudi enotni migracijski red pomenil integracijo različnih družbeno-gospodarskih situacij, politično-upravnih tradicij in vizij ter izgradnjo enovitega nadzornega sistema.

POT DO ZAKONA IN DRŽAVNE IZSELJENSKE SLUŽBE

Jugoslovanska država v začetni fazi ni bila ne pripravljena ne usposobljena za sistematično soočanje z migracijsko problematiko. Kljub priznavanju njenega pomena, opozorilom izvedencev in pozivom iz izseljenstva narodna vlada in politika izseljevanja nista pojmovali kot samostojnega vprašanja. Pozornost so vzbujali problemi, ki so se pojavljali z obnovljenimi izseljenskimi gibanji, posebno z nepričakovano velikim povratništvom. Šlo je za pravno zaščitne in varnostne, gospodarsko in socialno organizacijske ter politične zadeve, vključno s priznavanjem jugoslovanskega državljanstva, ki so sodile v delokrog različnih resorjev in ki so jih ministrstva ter periferni organi ob pomanjkanju skupnega načrta reševali s sprotnimi ukrepi. Ker je bila povezana s problemom dela, potreb in socialne varnosti prebivalstva, je bila izseljenska problematika opredeljena kot socialno vprašanje in formalno prišla v pristojnost Ministrstva za socialno politiko (Đikanović, 2012, 61–62, 70–71, 86).

Pomemben korak v smeri organiziranega obravnavanja izseljevanja na državni ravni je bil storjen maja 1920, ko so pri ministrstvu ustanovili Odsek za izseljevanje. Njegove naloge so bile skrb za repatriacije, narodna propaganda med izseljenci, organiziranje pošiljanja izseljenskih prihrankov in urejanje državnopravnih zadev na relaciji med izseljenci in domovino. Odsek je bil zadolžen tudi za regulacijo izseljevanja in preučevanje družbenih razmer ter položaja delavstva v tujini. Predvidena je bila vzpostavitev uradov z enakim delokrogom pri jugoslovanskih zastopništvih v tujini in namestitev njihovih odposlancev v izseljenskih pristaniščih. V New Yorku in Le Havru naj bi uredili izseljenske domove, med nalogami tega aparata je bilo tudi vodenje statistike izseljenskega in povratnega prometa. Uredba Ministrstva za socialno politiko o vzpostavitvi Odseka za izseljevanje je bila prvi uradni državnopravni akt, namenjen izseljenske-

mu vprašanju. Z njim so bili postavljeni zametki državne izseljenske službe na tujem in nastavki bodoče migracijske politike. (HDA-790, II/3, 127; Đikanović, 2012, 126)

Z migracijsko problematiko so se hkrati ukvarjale pokrajinske oblasti, ki so se "na terenu" spoprijemale z vsemi njenimi praktičnimi ter logističnimi vidiki. V Sloveniji je resor pripadal Poverjeništvu za socialno politiko pri Deželni vladi, od leta 1921 pa Odseku za socialno delo pri Pokrajinski upravi za Slovenijo, na katerem je bil ustanovljen Referat za izseljevanje (Goršič, 1927; Drnovšek, 2007). Na Poverjeništvu za socialno skrb pri Pokrajinski vladi za Hrvaško in Slavonijo je deloval podoben Izseljenski odsek. Ta odsek je odigral vidno vlogo pri razvijanju pravne ureditve izseljenskega vprašanja jugoslovanske države. Hrvaška je namreč imela na tem področju bogate predvojne izkušnje in vpeljan administrativni sistem. Vlada troedinega Kraljestva Hrvaške, Slavonije in Dalmacije je od leta 1901 v okviru upravne avtonomije lahko posegala v regulacijo prekomorskega izseljevanja. V okviru centralne ogrske zakonodaje in izseljenske službe je od leta 1905 pri vladi v Zagrebu deloval Odsek za izseljevanje, ki je vršil funkcije izseljenske službe za Hrvaško in Slavonijo. Vodil je statistiko, imel je informacijsko službo in službo za zasebnopravno varstvo, ki je izseljencem pomagala pri dedičinskih, zavarovalnih in odškodninskih zadevah. Opravljal je tudi funkcije za centralno ogrsko vlado. Ni pa imel besede pri izseljenski politiki. To so vodili v Budimpešti in se v osnovi ni skladala s hrvaškimi narodnimi interesi. Brez uspeha si je Troedina Kraljevina prizadevala izboriti avtonomijo tudi na tem področju (HDA-790, II/3, 120–123; Bučin, 2017, 39; Brunnbauer, 2016, 163–165).

Po vojni je Izseljenski odsek pri Pokrajinski vladi za Hrvaško in Slavonijo prevzel posle predvojnega Izseljenskega odseka in predstavljal njegovo nadaljevanje (HDA-790, II/3, 123²). Pravnik Artur Benko Grado je kot izkušeni predvojni državni funkcionar postal duša tega odseka in vplivni element na področju urejanja izseljenskega vprašanja na Hrvaškem in na državni ravni. Zagrebški Izseljenski odsek je bil kot organ področnega oblastva zadolžen za Hrvaško in Slavonijo. Zaradi vloge, ki jo je imel Zagreb kot prometno vozlišče in križišče migracijskih poti, pa se je ukvarjal tudi z izseljenci iz drugih delov države (Bučin, 2017, 40). Odsek je uvedel inovativne postopke za usklajevanje izseljevanja z vstopnimi pogoji priseljenskih držav in preprečevanje prisilnih repatriacij (HDA-790, II/3, 125–126). Posvečal

2 Zahvaljujem se sodelavcu Mihi Zobcu za prijazno posredovanje gradiva iz omenjenega arhivskega fonda.

se je statistiki jugoslovanskih migracij, študijam o migracijski zakonodaji in razvoju poslovnega sistema izseljenske službe. Sodeloval je z Mednarodnim uradom za delo v Ženevi, ki je začel ustvarjati svetovno statistično in zakonodajno dokumentarno bazo za potrebe Komisije za migracije (HDA-790, II/3,126). Udeležen je bil tudi pri obnavljanju koncesij ladjarskim prevoznikom, preverjanju razmer v izseljenskih pristaniščih in v drugih funkcijah centralne državne uprave (Bučič, 2017, 41–42). Delo na področju urejanja izseljenskega vprašanja je imelo skratka dve težišči, enega v Beogradu, drugega v Zagrebu.

Z letom 1921 so prizadevanja končno stopila v fazo, ki je obrodila zakonsko ureditev izseljenskega vprašanja. Do konkretnega premika je prišlo januarja 1921, ko se je na relaciji med ministrstvi za notranje in zunanje zadeve ter tistim za socialno politiko pojavil predlog o uredbi o izseljevanju. Glavni razlog za pobudo je bila potreba, da se zagotovi urejen in varen potek migracijskega procesa. Ta smoter je prevladal pod vtisom zlorab, ki so jih bili na poti deležni prekomorski migranti, in zagat upravnega aparata pri urejanju izseljenskih zadev (Đikanović, 2012, 70–71). V letu 1920 so z okrepitevijo prekooceanskega izseljenskega prometa problemi prišli močno do izraza in narekovali urgentno obravnavo.

Dne 21. maja 1921 je Ministrstvo za socialno politiko izdalo Uredbo o izseljevanju (Uredba, 1921). Uredba je bila tudi rezultat usklajevanja pogledov in stališč med Beogradom in Zagrebom. S tem v zvezi je aprila v Zagrebu potekala konferenca med predstavniki zagrebškega Odseka za izseljevanje in predstavniki Ministrstva za socialno politiko (Bučič, 2017, 43). Iz uredbe je nastal Zakon o izseljevanju, ki ga je Narodna skupščina izglasovala 30. decembra istega (Zakon, 1922). Zakon se je v nekaterih točkah razlikoval od uredbe. Spremembe je na posameznih mestih vnesel zakonodajni odbor na zasedanju 28. novembra 1921, pred tem pa je besedilo preučevala zakonodajna komisija, ker ga je bilo treba oblikovati v soglasju z ameriško kvotno zakonodajo, ki je stopila v veljavo julija 1921 (Stenografske beleške, 1922). Z uredbo in zakonom so bili vzpostavljeni nov, vsedržavni izseljenski red in pravni ter organizacijski temelji, ki so državo usposabljali za aktivno upravljanje migracij in vodenje migracijske politike.

Uredba in zakon nista urejala izseljevanja v vseh njegovih pojavnih oblikah in vidikih. Sestavljena sta bila "po meri" prekooceanskega izseljevanja in jemala pod svoje varstvo prekomorske migrante. Kot ugotavlja Vesna Đikanović na podlagi državnih arhivskih virov, je bila problematika pojmovana predvsem v skladu z izseljevanjem v ZDA in na tej premisi je bil koncipiran ureditveni akt. ZDA so bile

primarna smer selitvenega gibanja, v tej državi so živele najštevilčnejše jugoslovanske skupnosti, s tem izseljevanjem so bili povezani največji gospodarski interesi državljanov in države. Obstoječa evropska zakonodaja, ki se je razvila pred vojno, se je nasploh osredotočala na prekomorsko izseljevanje in je v malokaterih državah vključevala kontinentalne migrante. Razlikovala pa se je glede vloge in stopnje poseganja države v migracijske procese in z njimi povezane gospodarske posle. Jugoslovanski zakonodajalci so se zgledovali predvsem pri italijanski zakonodaji, ki je državi omogočala preglednost in institucionaliziran nadzor nad izseljevanjem v socialno varnostne namene. Dopuščala pa je tudi uravnavanje izseljevanja v skladu z ekonomskimi in drugimi italijanskimi interesi doma in po svetu (Miletić, 2009, 91–92). Upoštevati je vredno tudi, da se je Italija po vojni izredno angažirala za urejanje delavskih in migracijskih vprašanj. S tem, da se je zavzemala za ohranjanje dostopov do predvojnih delovnih trgov, širitev zaščite svojih izseljencev na tujem in enakopravnost delovnih migrantov, je med izseljenskimi državami uživala velik ugled (Tosi, 2002, 439–42).

ZAKON

Migracijski režim Kraljevine SHS je temeljil na svobodi izseljevanja. To načelo, ki je izhajalo iz liberalne predpostavke o izseljevanju kot osnovni pravici državljana, je bilo eksplicitno ali implicitno prisotno v vseh evropskih liberalnih zakonodajah. Jugoslovanska država si je pridržala pravico, da je po ministru za socialno politiko za določeno dobo in v določene države izseljevanje lahko omejila ali ukinila, če je to narekovala korist države ali izseljencev-državljanov (6. čl.). Izseljenec je bil po zakonski definiciji državljan Kraljevine Srbov, Hrvatov in Slovencev, ki se je selil v prekomorske dežele zaradi zaslužka s fizičnim delom in tisti, ki se je pridruževal svojim sorodnikom, ki so se prej izselili ob istih pogojih (7. čl.). V nasprotju z Uredbo, ki je kot predvojni zakoni izseljenca enačila tudi s potnikom tretjega ladijskega razreda oziroma podpalubja, je v zakonu ta pogoj odpadel. Umik so narekovala spremembe v cenah prekooceanske vožnje. Medtem ko je bila predvojna vozna v drugem potovalnem razredu šestkrat dražja kot v tretjem in se izseljenci drugega razreda niso posluževali, je po vojni razlika v ceni upadla na komaj 20 odstotkov. Obstajala je zato možnost, da bi si "uvozniki" delavcev sami naložili ta strošek in izseljencem izdajali formalne karte drugega razreda, da bi se izognili obremenjujočim proceduram in obveznostim, ki jih je terjala izseljenska zaščitna zakonodaja (Stenografske beleške, 1922, 354).

O tem delu definicije je tekla živahna razprava, ker je prinašal še druge posledice. Vprašanje je bilo tudi, ali naj se v definicijo izseljenca vključijo tudi "umski" delavci. Ker je bilo teh izseljencev zanemarljivo malo, je prevladalo stališče, da se zaščito omeji na fizične delavce, ki so je bili posebno potrebni. Ameriška kvotna zakonodaja, ki je ravno tedaj stopila v veljavo, je priseljence ločevala po državljanstvu in lastnih poklicnih ter drugih selektivnih kriterijih, zato definicija ni vplivala na sestav jugoslovanskega letnega kontingenta. Vključitev intelektualnih delavcev bi tudi odstopala od formulacij in pojmovanj izseljenca v mednarodnem pravu in dogovorih o delovnih migracijah (Stenografske beleške, 1922, 354).

Zakon je določal, da sme izseljenec zapustiti državno ozemlje samo s potnim listom, izdanim izključno za pot iz domače luke v luko dežele sprejemnice in enako je veljalo za povratnike (8. čl.). Potni list je bil osnovno sredstvo za nadzor in upravljanje migracij. Po prvi svetovni vojni je postal obvezen v vseh državah, medtem ko ga pred vojno nekatere niso predpisovale. Priselitev je bila večinoma možna zgolj z identifikacijskim dokumentom, po novem pa je bila poleg potnega lista potrebna vstopna viza (Kalc, 2016). Izseljenski potni list se je po predpisih novega zakona izdajal po postopku in kriterijih, ki so jih določali ministrstvo za socialno politiko, ministrstvo za notranje in ministrstvo za zunanje zadeve. Predpis o obveznem potovanju čez domače luke in celo izrecna prepoved potovanja preko tujih pristanišč sta bila ravno tako v funkciji nadzornega sistema, saj sta zagotavljala neposredni pregled vstopanja in izstopanja iz države. Ker država še ni razpolagala s pristanišči, opremljenimi za izseljenski promet, sta bila mišljena v bodoči perspektivi.

Potni list so državljani pridobili pod pogojem, da so izpolnili vojaške in poravnali davčne obveznosti ter da so izpolnjevali vstopne pogoje države sprejemnice; imeti so morali vsaj 18 let, mlajšim se je potni listi izdal skupaj s potnim listom rodbine ali opolnomočenega spremljevalca. Pogoja sta bila tudi kazenska neobremenjenost oziroma odsluženje morebitne sodne kazni (9. čl.).

Največ členov zakonskega besedila (čl. 10–29) je bilo namenjenih odpremljanju prekomorskih izseljencev in torej varnostnim predpisom za njihovo zaščito na poti. Odpremljanje in prevažanje izseljencev sta bila dovoljena samo od ministrskega sveta pooblaščenim ladjarskim podjetjem preko njihovih zastopništev na državnem ozemlju. Zastopniki, ki so morali biti v Jugoslaviji bivaajoči državljani, so smeli delovati izključno v poslovnih prostorih, prepovedana je bila katerakoli oblika rekrutacije in propagiranja izseljevanja ter denarnih operacij, razen informiranja o prevozu in prodaje vozovnic. Vozovnico so smeli izdati samo osebam s pridobljenimi potnimi

listinami in na podlagi pisne pogodbe. Določene so bile oskrba, odškodninske in druge obveznosti do izseljenca. Med temi je bil brezplačni povratni prevoz zavrnenih priseljencev, kar je ladjarskim podjetjem nalagalo soodgovornost za kontrolo in jih odvrčalo od špekulacij pri izdajanju vozovnic. Na voznjah v Jugoslavijo so bila dolžna tudi brezplačno sprejeti do petnajst povratnikov, ki jih je repatriirala jugoslovanska konzularna služba. Transporte z več kot 50 izseljenci je na stroške ladjarja spremljal potujoči inšpektor. Vkranje in izkrcanje je bilo predvideno samo v jugoslovanskih pristaniščih, parniki so morali ustrezati tehničnim predpisom, kar so preverjala pomorska oblastva. Zakon je skladno s standardi enakovredno ščitil domače in tuje državljane in s tem omogočil pritegnitev tujega izseljenskega prometa v korist jugoslovanskih pristanišč in ladjarstva. Temu in zaščiti nacionalnih gospodarskih interesov je bil namenjen tudi predpis o obveznem potovanju prek domačih pristanišč. Zavedati se moramo, da so v obliki voznin in drugih stroškov izseljevanja uhajala domači ekonomiji in investicijam znatna finančna sredstva.

Koncesijo so lahko pridobile domače in tuje ladjarske družbe, ki so morale na Narodni banki Kraljevine SHS položiti kavcijo kot garancijo in za plačevanje kazni za prekrške. Na vsako izdano vozovnico so plačevale tudi takso. Vozniške tarife, odobrene s strani ministrstva za socialno politiko, so morale biti plačane v jugoslovanski valuti. Ministrstvo za socialno politiko je imelo pravico popolne kontrole nad dejavnostjo ladjarskih podjetij in njihovih zastopstev v poslovnih prostorih in na ladjah. Pogodbo je lahko spremenilo in jim odvzelo pooblastilo, domačim podjetjem, če so nudila enakovredne pogoje potovanja, je smelo priznavati prednosti in olajšave.

Zakon je v prvem razdelku določal izseljeniška oblastva (čl. 1–5). Na vrhu je stal Odsek za izseljevanje in priseljevanje pri Ministrstvu za socialno politiko v Beogradu, ki je odgovarjal za resor in upravljal podrejena oblastva. Odredbe v zvezi z izseljevanjem je ministrstvo po potrebi izdajalo sporazumno z drugimi ministrstvi. Zakon je uvajal lik izseljenskega komisarja, ki je v pristaniščih nadzoroval in sporazumno s policijsko oblastjo, notranjim in prometnim ministrstvom urejeval izvajanje zakonskih predpisov o prevažanju izseljencev. Drugo pomembno funkcijo je vršil odposlanec Odseka za izseljevanje pri diplomatskih in konzularnih zastopništvih, ki je deloval kot vez z izseljenskimi skupnostmi. V poslovodni sistem je zakon vključeval same izseljenske skupnosti, in sicer z izseljenskimi odbori zastopnikov izseljenskih organizacij pod vodstvom tajnika. Izseljenski odbori so bili mišljeni kot opora konzularnemu odposlancu Odseka za izseljevanje v intervencijah pri oblasteh države gostiteljice.

Za financiranje izseljenske službe je zakon uvajal Izseljeniški fond. Upravljalo ga je Ministrstvo za socialno politiko in napajal se je s kaznimi za prekrške ter iz drugih virov. Med temi je bil prispevek, ki so ga plačevali povratniki in izseljenci v tujini za posredovalne usluge jugoslovanskih organov. Sredstva iz fonda so bila namenjena izvenproračunskim izdatkom, socialnim podporam, subvencijam nevladnim organizacijam, ki so se ukvarjale z izseljenci, gradnji izseljenskih domov in drugim pobudam.

Zakon je bil v mnogih delih nedorečen in je ministrstvu nalagal naknadna pojasnila in določila. Dopolnitev in dokončno strukturo sta zakonodaja in izseljenska služba v prvi razvojni fazi dosegli s Pravilnikom o izvrševanju zakona, objavljenem 1. 9. 1922 (Pravilnik, 1922). Pravilnik je uredil vprašanje razmerja med ministrskim Odsekom za izseljevanje in tistim pri Pokrajinski upravi v Zagrebu, katerih instance in medsebojne povezave niso bile definirane. Vprašanje je bilo rešeno z delitvijo službe med štiri oblastva: Odsek za izseljevanje na Ministrstvu v Beogradu, Generalni izseljeniški komisariat v Zagrebu, Luški, železniški in ladijski komisarijati ter izseljenski odposlanci Ministrstva za socialno politiko pri diplomatskih in konzularnih zastopstvih v inozemstvu.

Ministrstvu so pripadali vodstvo in nadzor nad izseljensko službo ter vodenje izseljenske politike. Pristojno je bilo za razvijanje zakonodaje in izdajanje zakonskih naredb, poročanje parlamentu, odobravanje pooblastil, imenovanje osebja, vrhovno upravo vseh funkcij in dejavnosti nižjestopenjskih organov, izdajanje publikacij, pospeševanje zvez med izseljenci in domovino, proračun in obračun, izseljeniški fond in kot zadnja instanca pri reševanju pritožb.

Generalni izseljeniški komisariat je bil operativni organ in težišče državne izseljeniške službe. Podrejen je bil ministrstvu in po navodilih nadziral poslovanje ladjarskih družb, izseljenski in povratni promet, reševal pritožbe zoper organe nižje stopnje, upravljal dom za izseljence v Zagrebu, reševal prošnje za potne liste, nadzoroval delovanje vseh organov izseljenske službe na državnem ozemlju, vodil evidenco državljanov v inozemstvu in tujcev v državi, reševal zasebnopravne zadeve izseljencev in njihovih sorodnikov, opravljal informacijsko službo o vseh zadevah, nanašajočih se na izseljevanje in interese izseljencev, vodil osnovno in komparativno migracijsko statistiko. Za sedež komisariata je bil izbran Zagreb, v pričakovanju, da se preseli v domače izseljensko пристanišče. Njegove kompetence pa je prevzel Odsek za izseljevanje Pokrajinske uprave v Zagrebu, ki je prešel v sestav komisariata.

Luški izseljeniški komisarji so opravljali kontrolno službo v domačih pristaniščih. Podobno

službo so opravljali železniški komisarji na Rakeku in v Mariboru, edinih mejnih postajah, skozi katere je bilo izseljencem dovoljeno izstopati in vstopati v državo. Potujoči ladijski komisarji so spremljali potnike na prekomorski vožnji. Izseljeniški odposlanci ministrstva pri jugoslovanskih zastopništvih v inozemstvu so bili kot vezni člen med izseljeniško službo v inozemstvu in službo ter ministrstvom v domovini zadolženi za stike z izseljeniški odbori, odnose z organi priseljenskih držav, nadzor ladijskih prevoznikov in agentov v inozemstvu, sodelovanje z jugoslovanskimi organi v zasebnopravnih in gospodarsko zaščitnih zadevah.

Pravilnik je tudi pojasnjeval pravni definiciji izseljenca in „zaslužka s telesnim delom“. Prva je poleg prekoceanskih vključevala vse izvenevropske prekomorske izseljence. Druga se je nanašala tudi na trgovce v prekomorskih deželah, ki so se prvotno izselili kot fizični delavci. Zakonska določila so veljala tudi za rodbinske člane oseb s statusom izseljenca. Pravilnik je nadalje določal odstopanja od zakonodajnih predpisov. Dovoljeval je potovanje preko inozemskih izseljenskih pristanišč, potni listi so morali zato biti opremljeni z vizami prehodnih držav; pogojno je dovoljeval tudi prodajanje voznic v državi ne koncesioniranih ladjarskih družb. V pričakovanju konsolidacije mednarodnih valut je omogočal plačevanje voznic v tuji valuti, ladjarskim družbam pa je nalagal tudi stroške kopenske poti ladijskega izseljeniškega komisarja do pristanišč. Sodelovati so bile dolžne pri preprečevanju trgovine z belim blagom in odhajanja vojaških obveznikov. Natančneje je določal pogodbeno razmerja in dolžnosti ladjarja v zvezi z bivanjem, prehrano, zavarovanjem in drugimi obveznostmi. Določal je tudi glavarine, ki so jo plačevale ladjarske družbe za vsakega potnika in povratniki ob izdaji ali vidiranju potnega lista pri konzularnih zastopništvih. Notranji ustroj, položaj in naloge Generalnega izseljeniškega komisariata, ki je začel s poslovanjem 25. aprila 1922, so bile določene s posebnim pravilnikom (Generalni komisariat, 1922).

SLOVENSKI ODZIVI IN ODMEVI

Uredbo in zakon o izseljevanju sta podpisala Vekoslav Kukovec oziroma Gregor Žerjav, slovenska člana državne vlade, ki sta si v obdobju sprejemanja zakonodaje v Beogradu sledila za krmilom Ministrstva za socialno politiko. Samo na sebi se zastavlja vprašanje o njuni vlogi in širši participaciji slovenske politike ter drugih deležnikov v diskusiji in pri snovanju izseljenškega pravnega reda. Za odgovor bo treba počakati na specifične raziskave, predvsem v beograjskih in zagrebških arhivih.

Slovenska politika in javnost sta že pred vojno glasno zahtevali ureditev izseljenskega vprašanja. Povojna situacija in nepripravljenost upravnega sistema za reševanje izseljenskih zadev, s katerimi so se v Sloveniji tudi kot prehodni deželi soočali, so zavest o tej potrebi še podkrepil.³ Načelno stališče je bilo, da mora država izseljevanje omejiti, v primerih ko ni potrebno, in ga glede na novi ozemeljski okvir ter gospodarski kontekst preusmeriti v druge dele jugoslovanske države.⁴ Podpore je bilo deležno vračanje izseljencev iz Amerike, da bi namesto tujini služili "zedinjeni in razširjeni domovini". Porajala se je tudi skrb, da bi povratnikov ta ne razočarala in jih spet izgubila, kar se je kmalu res začelo dogajati.⁵ Poleti 1919 je Anton Korošec kot slovenski zastopnik sodeloval na kongresu jugoslovanskega zadrugarstva v Beogradu, na katerem so razpravljali o ekonomskem potencialu jugoslovanskega izseljenstva in izdelali načrt za organizacijo povratništva v sodelovanju z izseljenskimi podpornimi organizacijami v Ameriki. Konferenco so organizirali, da bi vlado opozorili na kočljivost problema, ta pa zaradi nujnejših prioritet predloga ni odobrila (Iseljenska nedelja, 1933).

S pozivi k ukrepanju za zavarovanje gospodarskih interesov izseljencev so se tudi v Sloveniji oglašali razni eksperti. Devizni kapital iz Amerike, s katerim se je pred vojno okoriščala Avstro-Ogrska, je bil sedaj na voljo novonastalim državam in končno namenjen narodom, katerih pripadniki so ga onkraj oceana ustvarjali. P. Valjavec je zato marca 1919 pozival, naj se Jugoslovani valutno čim hitreje ločijo od Avstrije in krone, da zaščitijo vrednost pošiljk.⁶ Povratniki so svoja denarna sredstva morali unovčiti in zamenjati preden so vstopili v domovino, ker v jugoslovanskih bankah dolgo časa to ni bilo možno. Menjalni tečaji in provizije so zato prihrankom odjedali 30 odstotkov vrednosti in več.⁷ Ker državni monopol nad tujo valuto sprva ni vključeval pošiljk iz izseljenstva, so te postale predmet špekulacije in zasebnih zaslužkov, namesto da bi kot devizne rezerve služile zunanjetrgovinskemu poslovanju.⁸ Poseben problem so predstavljale de-

diščine, zavarovalne odškodnine in hranilne vloge za pokojnimi izseljenci, ki jih je v ZDA zadrževal upravnik sovražnega premoženja. Kljub temu, da je Jugoslavija s priznanjem pridobila pravico razpolaganja s tem premoženjem, se do leta 1920 ni aktivirala, da bi ga upravičenci lahko unovčili. Zamuda pri urejevanju meddržavnih odnosov je povzročala še vrsto drugih nevšečnosti.⁹

Oglasil se je tudi Ivan Švegel, karierni diplomat z bogatimi izkušnjami na področju izseljenskega vprašanja, pridobljenimi med službovanjem na avstro-ogrskih zastopstvih v ZDA in Kanadi.¹⁰ Novembra 1920 je v *Slovenecu* posegel v srž problematike z razpravo o temeljnih smernicah zakonske ureditve izseljenskega vprašanja. Ključni organ pri upravljanju in nadzoru migracijskega procesa je videl v izseljenskemu komisariju. Ta naj bi nadomestil drage zasebne agencije pri urejanju birokratskih, organizacijskih in drugih postopkov. Konzularne urade naj bi razbremenil poslov, ki so terjali specifična poznavanja zakonodaje posameznih zveznih držav. Posredoval naj bi na trgu dela, zastopal interese izseljencev v odnosu do ameriških pravnih oseb in skrbel za varno pošiljanje denarja.¹¹ Kot poznavalec ameriških razmer je Švegel nakazoval možnosti uporabe finančnega premoženja izseljencev za posojila novi jugoslovanski domovini in samofinanciranja izseljenske službe. Ob gospodarski pa je izpostavljajal predvsem politično in moralno vrednost jugoslovanskega izseljenstva, s katerim je morala država vzpostaviti "čim ožje odnošaje".¹² Švegel je bil sicer za komisarsko funkcijo osebno zainteresiran. V sporazumu z ministrom za socialno politiko Đuro Šurminom bi jo moral nastopiti na poslaništvu v Washingtonu že julija istega leta, a se to ni zgodilo (Rahten, 2018, 160). S prizadevanji za to imenovanje si je najbrž treba razlagati tudi Šveglovo javno razpravljanje o tem specifičnem vidiku urejanja izseljenskega vprašanja.¹³

Uredba in zakon o izseljevanju sta v Sloveniji naletela na deljene odzive. Strankarska nasprotja in politična stališča v zvezi z ureditvijo nove države so se odražala tudi na področju izseljenskega

3 Slovenec, 5. 9. 1920: Zopet na delu; Slovenec, 30. 12. 1920: Najnovejša sredstva zoper izseljevanje; Slovenski narod, 30. 12. 1920: Izseljenski škandal.

4 Slovenec, 27. 4. 1920: Kako je z našim izseljevanjem.

5 Slovenec, 21. 3. 1919: Vrnitev naših izseljencev; 4. 4. 1919: Amerika naj nam vrne naše ljudi; 8. 5. 1919: Naši Amerikanci; Tabor, 12. 2. 1922: Izseljevanje v Ameriko.

6 Slovenec, 19. 3. 1919: Valuta in izseljenci (Valjavec, P.).

7 Slovenec, 22. 7. 1919: Amerikanski dolar (Predovič, V.).

8 Slovenec, 8. 6. 1920: Zakaj padajo tuje valute (Slokar, I.).

9 Slovenec, 27. 3. 1920: Dediščine v Ameriki (Černe, I.); Trgovski list, 23. 10. 1920: Naše izseljensko vprašanje (Černe, I.).

10 Leta 1903 je napisal tudi obsežno študijo o priseljevanju iz avstroogrške monarhije v ZDA (Schwegel, 1904).

11 Slovenec, 4. 11. 1920: Naše izseljensko vprašanje v Severni Ameriki (Švegel, I.); 5. 11. 1920: Osleparjeni izseljenci (Švegel, I.).

12 Slovenec, 9. 11. 1920: Izseljenski komisarijat v Ameriki (Švegel, I.).

13 Švegel je bil tudi poslovno vezan na »industrijo izseljevanja«, saj je bil pred vojno in od leta 1920 do diktature zastopnik železniško ladjarske družbe *Canadian Pacific Railway Company* za Jugoslavijo. Kot tak je bil soudeležnik pri konkurenčnih bojih ladjarskih prevoznikov za koncesije, kar je vplivalo na njegove odnose z nekaterimi jugoslovanskimi politikami (Rahten, 2018, 159, 164).

vprašanja. Provladni politiki in tisk so ureditev pozdravljali in kljub pomanjkljivostim naglašali njene prednosti. Poudarjali so narodno-politični pomen zakonodaje, ker je država jemala pod svoje okrilje ne le izseljence med potjo, ampak tudi med bivanjem v inozemstvu. Utemeljevali so jo z načelom, da je bila delovna sila izseljenca del narodnega bogastva in da ima država pravico z njo razpolagati, izseljenec pa se je bil kot državljan dolžan podrediti državnemu hotenju. Zakonska ureditev naj bi bila skratka inštrument za uravnavanje izseljevanja v korist domovine in njenega vse tesnejšega povezovanja z izseljenstvom.¹⁴

Opozicijske sile in časopisje pa niso skoparili s kritikami. *Slovenec* je že od njegove ustanovitve napadal "diletantsko delo" Odseka za izseljevanje pri Ministrstvu za socialno politiko in mu očital nepoznavanje svojih nalog.¹⁵ Uredbo je označil za socialno diskriminatorno policijski ukrep, vreden absolutističnega režima, ne pa socialne politike. S pogoji o potnih listih, načinu potovanja in finančnih obveznostih ladjarjev naj bi zavirala odhajanje najbolj potrebnim, ne da bi se jim doma ustvarjalo gospodarske pogoje za delo in obstoj.¹⁶ Pogosto so politične strani kot že pred vojno izseljensko vprašanje izkoriščale za medsebojne očitke in druga drugo krivile odgovornosti za pojav sam.¹⁷

Novi zakonodaji so pozornost seveda posvetili tudi izseljenski časopisi. V glavnem so jo pozdravljali, komentarjev in začudenja pa so bila deležna njena sporna določila, predvsem omejitev na fizične delavce in obveznost potovanja čez jugoslovanska pristanišča. Opozarjali so na tehnične in pravne zagate ter praktične nevednosti, ki so jih ti predpisi ustvarjali izseljencem in povratnikom. Mnenja so bila vsekakor pozitivna. Jugoslovanski državi so priznavali, da je v primerjavi s prejšnjima storila odločen korak naprej.¹⁸

SKLEP

Izseljenski zakon je bil temeljni akt urejanja izseljenskega vprašanja v novonastali jugoslovanski državi. Že ob njegovem izglasovanju pa je bilo jasno, da ga je bilo treba nadgrajevati v skladu z mnogimi vprašanji, ki jih je migracijska problematika narekovala. Sprejet je bil predvsem pod pritiskom potreb po zagotavljanju varstva izseljencem ter zaščiti njihovega premoženja. Zato je bil naravnano pretežno k temu cilju in za potrebe prekomorskega

izseljevanja, ki je bilo najštevilčnejše in gospodarsko ter politično najbolj relevantno. Jugoslovanska zakonodaja je nastala v fazi, ko se je nova država šele postavljala na noge in se soočala s težkimi notranje in zunanjepolitičnimi izzivi, integracijo pravnega reda in vzpostavitvijo upravnih sistemov. Izseljensko vprašanje je bilo tudi zaradi politično nacionalnega pomena pritegnjeno v konstitutivni zakonodajni proces, ni pa bilo deležno vse potrebne pozornosti.

Med nastajanjem zakonodaje se je prizorišče mednarodnih migracij korenito spremenilo. Restriktivna politika ZDA je sprevrnila položaj in predvidevanja, v skladu s katerimi je bila zakonodaja zasnovana. Kvotni sistem je znatno zmanjšal možnosti izseljevanja v ZDA, državi pa narekoval uravnavanje izseljevanja in iskanje ustreznih rešitev za prilagajanje sistema ameriškim predpisom. Kvantitativna in kvalitativna selekcija upravičencev za sprejem v ZDA, porazdelitev letne kvote po pokrajinah, razlikovanje med kvotnimi in izven kvotnimi upravičenci in dopolnitev letnih kvot so terjali veliko konceptualnega, proceduralnega in upravnoorganizacijskega dela. Predpostavljali so tudi ažurno poznavanje ameriških predpisov in strikten nadzor gibanja. Od srede leta 1921 se je tako država morala ukvarjati vse intenzivneje s problematiko izseljevanja in nadalje razvijati sistem, da je lahko reševala zagate, ki so se vseskozi pojavljale (prim. Đikanović, 2012, 171).

Od samih zametkov zakonodaje so bili opredeljeni tudi nastavki migracijske politike. Poleg zaščite in nadzora so to bili zaviranje izseljevanja »nacionalnega elementa«, olajšanje odhajanja pripadnikov ne konstitutivnih narodov, razvijanje domoljubja in širjenje kontrole nad jugoslovanskimi izseljenskimi skupnostmi. Smernice politike so našle mesto v nadaljnji zakonodaji, predvsem pa v tajnih navodilih oblastem, ki so jih prevajale v prakso. Tudi ta načela pa so se morala delno ukloniti ameriški politiki. Maloštevilna priseljenska kvota je narekovala privilegiranje upravičencev konstitutivnih narodov, ameriške oblasti pa so favorizirale priseljence, ki so imeli sorodnike v ZDA in naj bi bili motivirani za hitro amerikanizacijo, medtem ko bi jugoslovanske oblasti dale prednost takim, ki so se želeli izseliti zaradi dela in zaslužka ter ostati nanjo navezani (prim. Đikanović, 2012, 169). Študije ugotavljajo, da narodnopolitične smernice migracijske politike na začetku niso bile izdelane,

14 Trgovski list, 17. 9. 1921: Pomen izseljenske naredbe; Priloga Jutru, 9. 7. 1921: Država in emigracija; Njiva, 17. 6. 1921: Država in izseljevanje (Druškovič, A.).

15 Slovenec, 30. 12. 1920: Najnovejša sredstva zoper izseljevanje.

16 Slovenec, 20. 8. 1921: Kitajski zid.

17 Slovenec, 7. 6. 1921: Za naše obrtnike.

18 Glasilo KSKJ, 23. 8. 1922: Jugoslovanski zakon o izseljevanju; Proletarec, 27. 7. 1922: Jugoslovanski zakon o izseljevanju; Prosveta, 16. 9. 1922: Oskrba izseljencev v Jugoslaviji; Jugoslavija, 17. 9. 1922: Zakon o izseljevanju.

oblikovale so se sproti kot reakcije na porajajoče se probleme. Zaradi priseljske in asimilacijske politike ZDA in s časom tudi drugih držav pa se je začela bolj sistematično razvijati tudi jugoslovanska nacionalna politika v odnosu do svojega izseljenstva.

Glede političnega in operativnega izvajanja zakonodaje se je od samega začetka kazal dialektični odnos med Beogradom in Zagrebom. V Zagrebu so si v imenu svojih predvojnih izkušenj, geografskega položaja in najštevilčnejše diaspore prizadevali za vidno vlogo v sistemu. Odraž teh prizadevanj je bil Generalni izseljeniški komisariat v Zagrebu, ki je postal nevrvalgični center delovanja izseljenske službe, medtem ko je ministrski Odsek za izseljevanje v Beogradu ohranjal pristojnost usmerjanja migracijske politike. Kmalu pa se je izkazalo, da pristojnosti komisariata pri odločanju o svobodi izseljevanja presegajo izvršilne funkcije in slabijo centralizacijo službe ter politično težo ministrstva. Leta 1923 je zato prišlo do zamenjave Generalnega

z izseljenskim komisariatom in prenosa odločanja o izdajanju potnih listov na ministrski Odsek za izseljevanje. To je veljalo samo za izseljevanje v ZDA, reševanje prošenj za potne liste za druge države je bilo prepuščeno pokrajinskim vladam (prim. Đikanović, 2012, 157–158).

Že sredi dvajsetih let so se zaradi pomanjkljivosti zakonodaje začele pojavljati zahteve po novem zakonu. Vprašanje se nikoli ni uvrstilo v agendo "visoke" politike, ki je posluh za problematiko izkazovala le utilitaristično v trenutkih, ko je bilo treba strniti vrste in podpreti kohezivnost države. Izseljeniška služba in njej pridružene ustanove pa so krepile svoje socialno, kulturno in politično delo doma in širile svoj vpliv med izseljenci po svetu. V okviru teh aktivnosti so se začeli uveljavljati tudi slovenski akterji, ki so razvili specifična in vse bolj artikulirana stališča do izseljevanja in izseljenstva, bodisi z vidika jugoslovanskega nacionalnega konteksta, bodisi s stališča slovenskega narodnega interesa.

REGARDING THE INTRODUCTION OF THE EMIGRATION LAW IN THE KINGDOM OF
SERBS, CROATS AND SLOVENES*Aleksej KALC*ZRC SAZU, Slovenian Migration Institute, Novi trg 2, 1000 Ljubljana, Slovenia
e-mail: AKalc@zrc-sazu.si

SUMMARY

In December 1921 the parliament of the Kingdom of Serbs, Croats and Slovenes passed the Emigration Act. This gave a common emigration law to the territory that had fallen under different migration regimes before the war. The migration regime was considered a fundamental part of the legal order of the newly created state, an integral part of its administrative system and its concept of the national state. The law subordinated emigration and immigration to the government and control of the state, it introduced the Emigration Service – a centralized administrative and organizational system responsible for implementing migration legislation and migration policy. The law was tailored to overseas emigration, which was both the largest and the most economically and politically relevant. It was adopted out of the need to ensure the protection of emigrants and their property. However, the quota system in the USA completely overturned the scenario and assumptions under which the law was drafted. This had several implications for the implementation of the migration regime. As early as the mid-1920s, the inadequacies of the legislation began to give rise to calls for a new law, but these were never substantiated. Nevertheless, the Emigration service and the private agencies associated with it have developed intense social, cultural and political activities that have increased their influence among emigrants throughout the world.

Keywords: Kingdom of Serbs, Croats and Slovenes, international migrations, migration laws, migration policy, migration control

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RESEARCH ON MIGRATION IN SLOVENIAN MEDIA: THE “OTHER” IN THE PERIOD OF “CRISIS”

Rok SMRDELJ

University of Ljubljana, Faculty of Arts, Department of Sociology, Aškerčeva cesta 2, 1000 Ljubljana, Slovenia
e-mail: rok.smrdelj@ff.uni-lj.si

ABSTRACT

The article presents the results of the first systematic literature review on migration in Slovenian media from the perspective of the hybrid media system. The mass media coverage of refugees and migrants is determined by the process of construction of the “other” in the Slovenian society. Stereotypical negative reporting prevails, portraying refugees and migrants as a security and cultural threat. The social media research notes the prevalence of an extremely xenophobic and racist discourse tacitly supported by the political elite and serving as a legitimisation for the government’s security policy.

Keywords: refugees, migrants, mass media, social media, hybrid media system, crisis

IL TEMA DELLE MIGRAZIONI NEI MEDIA SLOVENI: «GLI ALTRI» NEL PERIODO DI «CRISI»

SINTESI

Il contributo presenta i risultati della prima disamina sistematica della letteratura sulla copertura informativa del tema delle migrazioni dal punto di vista del sistema mediale ibrido. La cronaca sui rifugiati e migranti determina il processo della costruzione de «l’altro» nella società slovena. Prevale la cronaca stereotipata e negativa che presenta i rifugiati e i migranti come una minaccia alla sicurezza e alla cultura. Le indagini sui social rilevano la prevalenza di un discorso altamente xenofobico e razzista, che gode del tacito sostegno dell’élite politica e funge da legittimatore delle misure securitarie del governo.

Parole chiave: rifugiati, migranti, mass media, social media, sistema mediale ibrido, crisi

INTRODUCTION

"Migration in the media" and "media in migration" are two research directions within the broader field of media and migration studies (Wood & King, 2001; Pogliano, 2017). While the field of "migration in the media" is generally characterised by the examination of media representations of refugees and migrants¹ in the mass media and social media, the field of "media in migration" mostly takes into consideration ethnographic and anthropological research on the use of new media technologies in the migration process (Pogliano, 2017). The first field is dominated by the finding that mass media most often portrays refugees and migrants as the "other", "criminals" and "undesirables" (Wood & King, 2001; Consterdine, 2018; Eberl et al., 2018). However, the fundamental contribution of the second field is that new media technologies are a significant factor in the integration of refugees and migrants into the environment of the destination country (Redecker et al., 2010; Laanpere et al., 2011). In addition, contemporary digital technologies (e.g., smartphones) have an ambivalent role in the migration process. On the one hand, they are an important means through which refugees and migrants obtain information on their way to destination countries, but on the other hand, they jeopardise their status by recording activities (e.g., stops, movements, communication with others) and thus exposing them to state surveillance (Zavratnik & Cukut Krilić, 2018, 2020).

In this article,² I do not discuss "media in migration",³ but "migration in the media" in the period 1991–2020 in Slovenia. Namely, I present the results of the first systematic literature review on migration in the Slovenian media from the "hybrid media system" perspective (Chadwick, 2013). I intend to shed light on a relatively well-established research field in Slovenia that has not yet been systematically and comprehensively reflected on.

The hybrid media system perspective, a framework I applied in the present research, is defined as the broadest empirical framework for understanding the contemporary media landscape. Its key element is the online digital context, which dictates the forms of intertwining "old" and "new" media institutions, practices, and content. In other words, the hybrid media system is defined by the interaction of mass media and social

media. Mass media refers to traditional mass media and their news content, while social media refers to "new" media platforms determined by user-generated content.⁴

Numerous studies in the field of "migration in the media" have confirmed that mass media and social media have a significant role in shaping citizens' attitudes towards refugees and migrants. Both types of media normalise and reproduce the selection and hierarchy of key issues in the public sphere and influence their understanding (Chauzy & Appave, 2014; Consterdine, 2018; Eberl et al., 2018).

The roles of mass media and social media in shaping citizens' attitudes towards refugees and migrants are also important because most European citizens are not in direct contact with refugees and migrants. Media representations of them are thus their primary sources of information about refugees and migrants. For example, in one of the first Slovenian studies on migration in the media (Doupona et al., 1998 [2001], 16), it was observed that although the presence of Bosnian refugees had been relatively strong in the Slovenian public consciousness in the 1990s, few citizens had had personal contacts with them. Furthermore, Kogovšek Šalamon & Bajt (2016, 9) noted, in the context of the 2015–2016 refugee crisis, that the majority of the Slovenian population would not have even known that refugees and migrants had come to Slovenia if they had not been reported on by the media.

The above observations confirm the significance of addressing migration through the analysis of media content. Although media discourse is not the only one and independent of other discourses that generate the context of political consensus in the public sphere, it is the leading creator of the general framework that determines attitudes towards marginalised groups (Jalušič, 2001 [2002], 14). In the contemporary social context, mediated reality matters much more than any other form of reality (Strömbäck, 2008, 239), especially in the case of deprived social groups with whom the dominant society is not usually in direct contact (Medica, 2017, 79). Due to the central role of the media in shaping public attitudes towards the migrant issues, the question also arises whether the media discourse represents the migrant issues autonomously or is it just a "mouthpiece of political parties or other powerful groups" (Wood & King, 2001, 2). Who controls the dominant public image of a refugee and migrant in a hybrid media system?

1 I do not distinguish between the terms "refugee" and "migrant". I use them interchangeably to refer to all persons traveling, regardless of the reason for departure or arrival. Introducing more neutral hypernym into the discussion, e.g., "people on the move" (King, 2010), seems awkward and unfitting, given the studies in focus use the terms "refugee" and "migrant". On the other hand, I reveal the implicit ideological assumptions of the established labels for travellers in the prevailing media discourse.

2 This research work was conducted as part of the research programme Problems of Autonomy and Identities at the Time of Globalisation P6-0194 (funded by the Slovenian Research Agency) and as part of the activities funded by the eng. Milan Lenarčič University Foundation. I express my gratitude to Roman Kuhar for his comments on an earlier version of this article.

3 For examples of Slovenian studies on "media in migration", see Erjavec, 2015; Zavratnik & Cukut Krilić, 2018; 2020; Perner & Zavratnik, 2019; Lenarčič, 2020.

4 When I use the term "media" without adjectives, I refer to both mass media and social media.

The article is divided into four sections. First, I focus on the general features of Slovenian research dynamics in the field of "migration in the media" in the period 1991–2020. I define the principal object of the analysis, the frequency of occurrence of the studies, the predominant sample and method, and some other peculiarities in the research dynamics. Although the Slovenian research context is in focus, in some cases, I highlight the similarities or differences with broader European research trends. In the second section, I address the constants and changes in the media representations of refugees and migrants in mass media, and in the third section, I do likewise in the area of social media. In both sections, I also answer the question of whose discourse is privileged by the contemporary media. In the concluding section, I reflect on the main findings and clarify further research perspectives.

GENERAL FEATURES OF THE FIELD

Object of analysis

The principal object of the analysis in the research field of "migration in the media" in Slovenia is one of the three mass arrivals of refugees and migrants in Slovenia in the periods 1992–1993, 1999–2001, and 2015–2016.⁵ In the prevailing media and political discourse, these arrivals were labelled by the ideological term "crisis" (Žagar, 2018, 103), which presupposes how to understand the mass arrival of refugees and migrants and how to act in such a situation: as in the case of an epidemic or natural disaster, which requires immediate emergency measures and the activation of the repressive state apparatus. The creation of a problem, a moral panic and a crisis (Jalušič, 2001 [2002]; Drolc, 2003; Erjavec, 2003; Kralj, 2008; Esses et al., 2013; Berry et al., 2016; Milharčič Hladnik, 2016), which in political practice leads to the tightening of the asylum legislation and the closure of Slovenia's state borders, is a constant prevailing political and media attitude in all three periods (Doupona et al., 1998 [2001]; Mihelj, 2004a; Kralj, 2008; Malešič, 2017; Pajnik, 2017; Vezovnik, 2018b; Žagar, 2018).

In the first period, as a result of the war on the territory of the former SFRY in the summer of 1991, Croatian refugees were the first to arrive (most of them from Vukovar and Osijek in eastern Croatia and some also from Karlovac and Krajina). They stayed in Slovenia for a brief time and did not attract much public attention. A massive influx of Bosnian refugees followed, which was the subject of media attention, mainly between April and June 1992 (Doupona et al., 1998 [2001], 14–15). The second period was dominated first by the arrival of Kosovo refugees in spring 1999 (Erjavec, 2003, 84) and later by migrants from the former Soviet republics, Asia,

Middle East, and Africa (Žagar, 2018, 103). They were reported in the media, mainly between autumn 2000 and the first three months of 2001 (Jalušič, 2001 [2002], 16–21). The third period encompasses the arrival of refugees and migrants from Syria, Afghanistan, and Iraq in the second half of 2015, especially in October and November, when the number of arrivals peaked, and were accompanied by an intense media coverage (Eurostat, 2019; Migracije v številkah, 2016).

It should be noted that while Bosnian refugees stayed longer in Slovenia, for most of the arriving refugees and migrants in the second and third periods, Slovenia was only one of the transit countries on the way to the destinations in the Western and Northern Europe. Furthermore, all three mass arrivals were shaped by different socio-historical contexts. While the first period is characterised by the immediate proximity of Slovenian independence and the disintegration of the SFRY, which led to wars and the arrival of Croatian and Bosnian refugees (Erjavec, 2003), the later migrations to Slovenia are coupled with broader global processes. Namely, in the second period, people migrated mainly due to the desolate economic situation in the countries of origin (Pajnik et al., 2001), while in the third period the emergence of the "Arab Spring" and the volatile military and social situation in the region dictated the pattern of migration dynamics around the world (Kogovšek Šalomon & Bajt, 2016; Zadnikar, 2017).

The third period is characterised by a radically different media landscape compared to the first and second periods, which were mainly covered by traditional mass media, while the third period was shaped by both mass media and social media (Wright, 2014, 461–462). In 1992 and 2000, most information was accessible through mass media, while in 2015, much of the information was also provided through social media, especially Facebook and Twitter (Žagar, 2018, 120). The change in the media landscape and the use of new media technologies affect not only the dominant media portrait of the contemporary refugee and migrant (Wright, 2014), but also a migration process that is not only tied to physical space, but also cyberspace (Lenarčič, 2020).

One of the three mass arrivals in Slovenia as the principal object of analysis in the research field of "migration in the media" requires a brief critical comment. A migration is a complex phenomenon consisting not only of the *arrival* of individuals, but also of their *departure* (Lukšič Hacin, 2017). It seems that the existing studies—by choosing the object of study in focus—implicitly reproduce the image of a refugee and migrant who comes to Slovenia and does not belong to the Slovenian ethnic national community. On the one hand, the studies mostly focus on the media representations of Bosnian refugees, migrants from Eastern European countries and refugees and migrants from the Middle

⁵ In the article, I call them the first, second and third periods.

Eastern countries. On the other hand, the studies do not tackle media representations of other travelling groups, e.g., "Slovenes from Sarajevo" (Šumi, 2001; Klavora, 2012) or "Slovenes from Argentina" (Lukšič Hacin, 2004), who also arrived to Slovenia but were recognised as part of the Slovene ethnic community and, therefore, did not have the status of foreigners. In other words, the studies focus on media representations of the "other", a foreigner excluded from the Slovene ethnic community and not welcome in Slovenia. Simultaneously, they do not address *the invited*, especially the members of the Slovenian ethnic diaspora, who after Slovenia's independence participated in the process of imagining the Slovenian nation, not through *exclusion*, as in the case of foreigners, but through *inclusion* in the Slovenian nation (Štiks, 2010), based on the idea of Slovenia as a country of all blood-related Slovenians and not as a country of all its inhabitants (Mihelj, 2004a). To understand more comprehensively the narratives of exclusion and inclusion in the prevailing media discourse in Slovenia, further research should also focus on refugees and migrants who do not have the status of the "other".

Frequency

The studies in focus were collected through the Slovenian national bibliographic system Cobiss under the keywords "refugees" and "migrants". Besides, I checked the volumes in the Peace Institute's book series MediaWatch, all issues of the Intolerance Monitor Report and the Monitor ISH, as well as some hits in the Google search engine. I focused on journal articles, chapters in monographs, and other scientific texts that chose media depictions of refugees and migrants as their object of study and appeared in the period 1991–2020 in Slovenia.

In terms of the number of studies, periods of continuity and discontinuity could be discerned. In the period 1991–1997, no studies appeared. Later, in the period 1998–2012, 19 studies were published, focusing mainly on the first and the second mass arrival.⁶ In the years 2013 and 2014, again no studies could be found. The turning point comes after 2015 when the number of studies increases rapidly. In the period

2015–2020, 24 studies were published, focusing mainly on the third mass arrival.⁷ However, the first period is the least researched, while the last received the most research attention.⁸

The same trend can be observed in the broader European research dynamics. The so-called 2015–2016 European refugee crisis, referred to in this article as the third period, represents the dominant research topic in the broader field of media and migration research in Europe, especially in 2017 and 2018, when most studies were published compared to previous years (Eberl et al., 2018, 208). The situation is similar in Slovenia, where most of the studies published in the last five years appeared in 2017 and 2018.

Sample, method and some other peculiarities

Most studies focus on mass media coverage, among which the daily or weekly newspapers dominate (e.g., Doupona et al., 1998 [2001]; Kuzmanić, 1998 [1999]; Jalušič, 2001 [2002]; Kuhar, 2001; Bassin et al., 2002; Erjavec, 2003; Mihelj, 2004a; 2004b; Pajnik, 2007; 2008; 2017; Kralj, 2008; Vezovnik, 2015a [2015b]; 2017b [2018a]; Jontes, 2017; Pušnik, 2017; Šaina & Turnšek, 2017). Research on television media coverage is also present in the field (e.g., Erjavec, 2003; Mihelj, 2004a; 2004b; Hrvatin, 2017; Luthar, 2017; Vezovnik, 2018b; Smrdelj & Vogrinc, 2020). The content of social media is less frequently analysed compared to mass media (e.g., Kuzmanić, 2001; Bajt, 2016; 2018; Malešič, 2017; Velikonja, 2017; Žagar, 2018; Vehovar et al., 2020). A similar situation is evident in the broader field of media and migration research in Europe. Traditional printed mass media are most frequently analysed, while social media content, online news, and interpersonal communication are covered less frequently, despite being an important segment of the contemporary media landscape (Eberl et al., 2018, 218).

Methodologically, approaches related to discourse analysis (e.g., Doupona et al., 1998 [2001]; Jalušič, 2001 [2002]; Kuhar, 2001; Pajnik, 2007; Kralj, 2008; Vezovnik, 2015a [2015b]; 2017b [2018a]; 2018b; Pajnik, 2017; Šaina & Turnšek, 2017) and frame analysis (e.g., Jontes, 2017; Malešič, 2017) predominate. On

6 These are: Doupona et al., 1998 [2001]; Kuzmanić, 1998 [1999]; Jalušič, 2001 [2002]; Kuhar, 2001; Kuzmanić, 2001; Bassin et al., 2002; Drolc, 2003; Erjavec, 2003; Mihelj, 2004a; 2004b; Mlekuž 2006; 2007 [2011]; 2008 [2009a; 2009b; 2016]; Pajnik, 2007; 2008; Kralj, 2008; Žagar, 2002a [2002b; 2004; 2006], 2009; Vidmar Horvat & Učakar, 2012 (N.b. identical studies—unchanged or slightly modified—republished elsewhere are listed in square brackets.)

7 These are: Vezovnik, 2015a [2015b]; 2017b [2018a]; 2018b; Bajt, 2016; 2018; Pajnik, 2016; 2017; 2018; Vidmar Horvat, 2016; 2017; 2020; Hrvatin, 2017; Jontes, 2017; Luthar, 2017; Malešič, 2017; Pušnik, 2017; Šaina & Turnšek, 2017; Velikonja, 2017; Arnejčič, 2018; Vezovnik & Šarič, 2018; Žagar, 2018; Jalušič & Bajt 2020; Smrdelj & Vogrinc, 2020; Vehovar et al., 2020 (N.b. identical studies—unchanged or slightly modified—republished elsewhere are listed in square brackets.)

8 The reasons for this situation are probably systemic and have nothing to do with research affinity. It is not that the third period is more relevant and interesting than the second or the first one. The crucial reason most likely lies in the fact that the conditions of production of academic work in the first and second periods were quite different from those in the third period, since they were not determined by the Sicris hyperproduction imperative that demands the quantitative accumulation of scientific texts. This could be one of the possible reasons which explains the low volume of studies in the first period and the large production in the third period.

the one hand, most studies focus on mass media and social media content separately. Although mass media and social media interact in the contemporary hybrid media system, they are very rarely studied in their hybridity. On the other hand, studies dealing with different media (e.g., Žagar, 2018) do not make theoretical and methodological distinctions in relation to different media content, as it is analysed with the same approach, regardless of the type of media that produced it. For example, the traditional mass media content is usually treated in the same way as the social media content without taking into account the specifics of the contemporary media landscape determined by the online digital context that influences the (re) production, circulation and reception of the media content (see Klinger & Svensson, 2015).

Most studies focus on the periods of most extensive media coverage coinciding with the periods of mass arrivals in Slovenia. The analysis of media portrayal of refugees and migrants is most interesting for researchers in the cases of the most extensive media coverage. Exceptions are Kuzmanič (1998 [1999]), Mlekuž (2006; 2007 [2011]; 2008 [2009a, 2009b, 2016]), Pajnik (2007), Vidmar Horvat & Učakar (2012), and Vezovnik (2015a [2015b]) who analyse a sample of media texts outside the periods of mass arrivals in Slovenia. Some of these studies also aimed at different objects of analysis. For example, Mlekuž (2006; 2007 [2011]; 2008 [2009a, 2009b, 2016]) analyses the media representations of immigrants and their descendants from the countries of the former Yugoslavia through the discourse on *burek*, a dish with a distinctly immigrant and "Balkan" connotation in Slovenian media and culture. On the other hand, Vidmar Horvat & Učakar (2012) and Vezovnik (2015a [2015b]) focus on the media representation of ex-Yugoslav immigrant workers, which attracts media attention mainly due to the events related to the 2009 economic crisis leading to bankruptcy of numerous enterprises, especially in the construction sector, where hundreds of immigrant workers lost their jobs and social security (see the author's studies).⁹

The research focus is on analysing media content, while the study of media effects on the audience is largely neglected. Such lack of study is also a specific feature of the broader field of media and migration research in Europe (Eberl et al., 2018, 215–217). An exception in Slovenia is Malešič (2017), who analyses media and political discourse from the perspective of securitisation in the third period. The author finds that the results of public opinion polls confirm the influence of media and political discourse on public opinion,

with print media being relatively neutral in portraying migrants as a security problem and even opposing excessive securitisation, while political representatives were biased. The most biased was the largest opposition party at the time, the right-wing SDS, which disseminated the discourse on migrant securitisation based on selective information, simplifications, and exaggerations.

In the broader field of media and migration research in Europe, comparative research between selected states is very rare, indicating a need for more comparative studies, as migration is an international issue and it is usually not confined only to one country (Lecheler et al., 2019, 698). Even when studies do involve a comparative approach, they are often limited to describing results, without the intention of clarifying differences between the countries (Eberl et al., 2018, 215–217). Although comparative studies are also rare in Slovenia, they can still be found. Mihelj (2004a) and Žagar (2018) deal comparatively with different periods of mass arrivals in Slovenia. Furthermore, Šaina & Turnšek (2017) present a discursive analysis of metaphors in dailies *Večernji list* in Croatia and *Slovenske novice* in Slovenia. Vezovnik & Šarič (2018) discuss visual representations of migrants on Slovenian and Croatian online public portals, and finally, Jalušič & Bajt (2020) discuss changes in attitudes towards refugees and migrants in public debates on migration and integration in Austria, Denmark, Poland, Slovenia, Spain, and the United Kingdom.

Although I argue below that negative stereotypical coverage predominates in the media, traces of positive media coverage can also be detected in some studies. In the case of the second arrival, Jalušič (2001 [2002]) and Mihelj (2004a) discuss the switch to a more positive media reporting, which came as a result of the condemnation of the public's xenophobic reaction by some politicians, non-governmental organisations (NGOs) and scholars. Based on the analysis of the Slovenian mainstream print media in the period 2003–2005, Pajnik (2007) notes the emergence of stories, albeit few, in which refugees speak of or report on their difficulties in finding work, housing, etc. However, as the author stresses, even the seemingly positive coverage has its pitfalls. For example, although a refugee voice is included in a particular media reporting, their stories are a prop for content that understands integration processes as the adaptation of "them" to "us". Also, a lack of reflection exists on the integration policy and approaches that do not shift responsibility for integration solely onto the refugees.

⁹ Although Komac (2005) does not directly address the refugee and migrant issue, as he discusses the role of the media from the perspective of the national minority, his contribution should also be mentioned here. The author focuses on the issue of the right of members of national minority communities to access the media and consequently to participate in cultural life. He develops a theoretical starting point for addressing three issues: 1) media in the language of the dominant ethnic group and minority issues; 2) media production by minorities themselves in their own language; and 3) access to media by members of national minorities from their "mother country". Although the author's paper was written before the emergence of social media, it can still be applied to research from the hybrid media system perspective.

MASS MEDIA

Based on the results of the collected studies appeared in the period 1991–2020, I find that the mass media coverage of refugees and migrants is initially determined by the process of construction of the "other" in Slovenian society, which is also a constitutive feature of the media coverage of marginalised social groups in post-socialist Slovenia (Pajnik, 2003; Petković et al., 2006; Vezovnik, 2017a). The "other" in the media coverage of refugees and migrants is built on a complex interweaving of nationalist discourse, security discourse, criminalisation discourse, and humanitarian discourse. These discourses have different manifestations in the first, second and third periods of mass arrivals, and they dictate a predominantly xenophobic and stereotypically negative media coverage. The position of the "other" in relation to media coverage of refugees and migrants manifests most explicitly at the level of 1) naming, 2) the dualism of "us" vs. "them" and the natural disaster metaphors, 3) the privileging of the voice of the parliamentary political elite, and 4) the marginalisation of the refugees' voice (see references below).

The nationalist discourse that was strongly present in the first period is related to the establishment of the new state and the idea of Slovenia as a country of all blood-related Slovenians and not as a country of all its inhabitants (Kuzmanić, 1998 [1999]; Mihelj, 2004a). Like other former Yugoslav republics, Slovenia built its national identity on ethnic antagonism that manifested not in bloody interethnic wars but the construction of moral panic or "crisis" related to incoming Bosnian refugees in the first period and migrants later in the second period (Erjavec, 2003). Both were presented as a cultural and security threat to the Slovenian nation (Jalušič, 2001 [2002]; Kuhar, 2001; Kralj, 2008). In the media coverage, they appeared as a distinct social group or as part of all "southerners" or "Balkans" (Kuzmanić, 1998 [1999]). In the first period, Bosnian refugees in particular were portrayed in a nationalistic manner as dirty, lazy, uncultured, nationalistic, non-European, Balkan, prone to violence and crime. Simultaneously, a positive self-image of the Slovenes was established. Implicit features of the media texts (e.g., specific categorisation of texts in newspapers or television reports within daily news broadcasts, selection of interviewees and use of metaphors and symbols) reinforced these negative images (Mihelj, 2004a, 432).

In the first period, an explicit association existed of the Bosnian refugees with the Balkans and of the Slovenes with Europe. The idea of the Balkans symbolised something backward and negative, associated with the former socialist Yugoslav regime, and opposed to the Western democracies that Slovenia was supposed to follow after its declaration of independence in 1991. Since the Bosnian refugees were part of the former common Yugoslav state, they were associated with the idea of the Balkans. In the second period, when migrants from Eastern European countries, Asia and elsewhere arrived, Slovenia was no longer located in Europe or the West, but was recognised as an area separating "West" and "East", that is, "wealth" and "poverty". Slovenia declared itself as the defender of Europe associated with the idea of "wealth". The restriction of migration was interpreted in the light of the defence of "wealth" against "poverty" (Mihelj, 2004a, 434–435). In the third period, Slovenia similarly took over the role of the guardian of the Schengen border on its own initiative. This role was, however, filtered through memories of the 20th century, especially the allegedly traumatic connection to the socialist Eastern Bloc (Vidmar Horvat, 2017).¹⁰

Parallely to the nationalist discourse, the security discourse and the criminalisation discourse also intensified. The security discourse combined with the rhetoric of exceptionalism, the criminalisation discourse and the idea of risk and imminent danger created the so-called securitisation of migration (Malešič, 2017; Šaina in Turnšek, 2017; Učakar, 2017; Vidmar Horvat, 2017; Vezovnik, 2018b; Smrdelj & Vogrinc, 2020).¹¹ In the first period, Bosnian refugees were presented as a threat to public order and security and as potential criminals (Doupona et al., 1998 [2001], 23). At the beginning of the second period, migrants were reported in the news related to crime, illegal crossing of the state border being the most commonly reported on. The media coverage was dominated by succinct police reports comprising information about the number and the place where migrants were apprehended. Later, in the second period of the mass arrivals, the topic expanded to other sections in the media but remained in the context of crime news (Bassin et al., 2002, 161; Erjavec, 2003, 88–89). Compared to Bosnian refugees, migrants in the second period were more often referred to as "illegal migrants" and the "illegals", which further emphasised their illegality and criminality. They were portrayed as exploiters of the asylum process justifying

10 Nationalist discourse is also closely linked to the media construction of the "border", which has different meanings in different periods and geographical regions. For example, Zavratnik (2003) analyses various forms of intolerance in the case of the media discourse at the Slovenian-Croatian state border. Moreover, using the example of media and political discourse at the Italian-Slovenian state border during the first wave of the SARS-CoV-2 epidemic, Jurić-Pahor (2020) shows that border discourse is associated with the fear of contagion, which on the one hand implies exclusion, but on the other hand it also establishes awareness of the need for empathic and cross-border European integration.

11 Trends related to the increasing intertwining of criminal and immigration proceedings are also defined as "crimmigration" (see Bajt & Frelj, 2019, and Kogovšek Šalamon, Frett & Stark Ketchum, 2020).

deportations and the tightening of the asylum legislation (Žagar, 2018, 105). Furthermore, the securitisation of migration was also present in the media discourse of the third period. It resulted in the implementation of many concrete political measures, such as the instalment of a razor wire fence along the border with Croatia, tightening of the asylum legislation, strict border controls, "militarisation" of the state border through conferring additional power upon the army, etc. (Malešič, 2017, 965; Vezovnik, 2018b).

Humanitarian discourse also plays an important role, referring to the dynamics between "here" and "there". When refugees are "there", far away from "our" country, they are recognised as victims of a humanitarian and war catastrophe, but when they are "here", they threaten "our" security and culture (Wright, 2014, 461). In Slovenia, the humanitarian discourse is documented on the example of Slovenian national television, where the coverage before the third mass arrival focused on tragic news about travelling refugees and migrants in overcrowded boats, rescuing them and collecting their bodies from the Mediterranean Sea between Libya and Italy. The coverage during this period is defined by the humanitarian discourse, which allowed the existence of the refugee and migrant voice and offered the media consumers the possibility of identification with their unfortunate fate. In Slovenia, the change occurred in September 2015, when the first larger group of refugees and migrants crossed the Croatian-Slovenian border by train to continue their journey to Germany. As long as the refugees were far from Slovenia, they were occasionally reported on as a humanitarian problem abroad. However, when Slovenia became their transitional country on their way to the West, the focus shifted from the prevailing humanitarian discourse to the prevailing security discourse (Smrdelj & Vogrinc, 2020, 293–294). Moreover, the discursive shift tied to the dynamics between "here" and "there" is not only a peculiarity of the Slovenian national television reports, but it is also a feature of the mass media in other European countries (Georgiou & Zaborowski, 2017; Consterdine, 2018).

Finally, Jalušič & Bajt (2020), discussing changes in the treatment of migration policy in political and media discourse, also noted a significant move from the previous proclamation of more liberal and democratic values that sought equal rights for refugees and immigrants to a stricter approach to immigration and integration.

Naming

The naming of refugees and migrants is usually determined by the distinction between "genuine refugees" and "economic migrants"—a constant feature of the media coverage in Slovenia and other European countries (see Kaye, 2001; Wood & King, 2001; Crawley, 2005; Nickels, 2007; Szczepanik, 2016; Consterdine, 2018). The distinction is very noticeable in the second period

when a distinction between Bosnian refugees from the first period and migrants from the second period was introduced. In the first period, the term "temporary refugees" prevailed, in the second one "illegal migrants". The former were recognised as having the desire to stay in Slovenia for some time, while the latter were assumed to be only crossing Slovenia because they were leaving their home country for economic reasons and, therefore, their lives were not in danger as was the case with Bosnian refugees (Žagar, 2018, 111–112). Labelling assuming the migrants came to Slovenia with the intention of remaining here for a long time was very rarely chosen (Mihelj, 2004a, 434).

The term "illegals"—explicitly defining foreigners as criminals—was also often used for migrants in the second period. This term reduced their status to mere violators of the law while obscuring the complexity and authenticity of the migratory experience (Žagar, 2018, 114). As a result, migrants in the second period were most often referred to as thugs and criminals associated with the police and criminal activity (e.g., drugs, prostitution). Besides, they were portrayed as dirty, unhygienic, and as potential carriers of communicable diseases (Bassin et al., 2002, 164; Erjavec, 2003, 86; Mihelj, 2004a, 436). Compared to Bosnian refugees, they were less often the object of sympathy (Mihelj, 2004a, 436).

Also in the third period, the goal of the Slovenian political elite was to categorise as many people as possible as economic migrants, i.e. as individuals who could be more easily rejected and deported (Velikonja, 2017, 112–113; Vezovnik, 2017b [2018a], 128–129; Žagar, 2018, 121). When politicians and the media wanted to emphasise the humanitarian dimension, they referred to them as refugees (especially women and children). But when border controls were tightened, they argued for a separation of refugees and supposedly undeserving economic migrants, especially young men, who should have stayed at home and defended their homeland. Later, when a new border regime with a razor wire fence was introduced, the supposedly undeserving economic migrants became potential terrorists (Pajnik, 2016, 67; Pajnik, 2018, 190–191). Moreover, Pušnik (2017) demonstrated that refugees were doubly degraded in the right-wing press: first, they were portrayed as economic migrants attacking the economy of "our" country, and then their status was further reduced to a Muslims assaulting not only the economic but also the cultural foundations of Slovenia.

The dualism of "us" vs. "them" and the natural disaster metaphors

The natural disaster metaphors illustrating the "amount" of arriving refugees (e.g., wave, river, flood) was another constant in the media coverage of refugees and migrants in Slovenia (Doupona et al., 1998 [2001]; Mihelj 2004a; Pajnik, 2017; Pušnik, 2017;

Arnejčič, 2018; Žagar 2018). In the broader European research dynamics, the representation of migrants as masses and hordes was also recognised as negative manner of reporting (Eberl et al., 2018, 213–214). The metaphor of natural phenomena implied that migrations are unpredictable, they could only be curbed by force and aggression, their causes were independent of human action, and the role of politics and social causes of migration were not reflected. Such a narrative was a prerequisite for the establishment of the "other", for its homogenisation and differentiation. Velikonja (2017) explains that homogenisation is about the lack of reflection of any intra-group heterogeneity and the representation of refugees and migrants as de-individualised, ahistorised and apolitical subjects. Homogenisation is complementary to differentiation, which is associated with the persistent emphasis on differences between "us", the members of the dominant society, and "them", the refugees and migrants. The dualism of "us" vs. "them" manifests itself in many different discursive contexts. Vezovnik (2017b [2018a]), for example, shows that tabloid news in the third period primarily creates binary dichotomies between "us" as those who embody victims, heroes, and heroized victims, and "them" who embody a cultural and security threat to the majority population.¹²

The privileging of the voice of the parliamentary political elite

The research notes the privileging of the voice of the parliamentary political elite (e.g., the government and ministry representatives, the MPs) and the marginalisation of other voices (e.g., NGO representatives, academics, refugees and migrants). Representatives of the political mainstream are given the most space in media coverage of refugees and migrants. Their voice appears not as one of the possible explanations, but as the central and most normal interpretation of what is happening. The mass media fail to distance themselves from the voice of the parliamentary political elite and establish their own perspective on the refugee issues by presenting the position of the political elite as one of many and not as the only and most self-evident one. Journalists uncritically adopt their discourse, which is evident at the level of word choice, selection of interviewees, categorisation of news, and quoting mainly official government sources while neglecting alternative sources (see references below).

The example of privileging the voice of the parliamentary political elite was already documented in the first period. Doupona et al. (1998 [2001], 20–23) argued that journalists were seriously concerned with

the maximum number of Bosnian refugees Slovenia could have accepted. The issue, initially launched by the political elite, was taken over by the journalists and presented as a legitimate national problem, rather than stressing that this was only one of the numerous possible ways of addressing the refugee topic and that it stemmed from the discourse of the parliamentary political elite. Consequently, the refugee "wave" metaphor prevailed, illustrating the number of Bosnian refugees arriving.

At the beginning of the second period, brief news reports appeared regularly in the media focusing on the migrants apprehended while crossing the state border. News releases provided to the media by police representatives were published or broadcast almost unaltered. Journalists normalised the government's xenophobic views by faithfully and uncritically mirroring the police definition of "illegal migrants" (Erjavec, 2003, 88–89). Later, in January and February 2001, two positions were established in the media—the "voice of the people" position and the position against xenophobia (Jalušič, 2001 [2002]; Erjavec 2003; Mihelj, 2004a). The "voice of the people" represented the views of residents and civic groups who spoke out against migrant accommodation centres in their respective neighbourhoods. Journalists normalised xenophobia by faithfully and uncritically mirroring their views (Erjavec, 2003). The victim statuses were attributed to locals rather than migrants (Jalušič, 2001 [2002], 23). In response to xenophobic rhetoric, appeals for more tolerant media coverage started to emerge, demanded by some intellectuals, NGOs and even politicians. Journalists were divided into two sides: the majority supported the "people" over the "state", while the minority labelled these protests as xenophobic (Mihelj, 2004a, 436). According to Jalušič (2001 [2002], 24), the position of the "voice of the people" redefined Slovenian national identity, which was no longer derived from the opposition Slovenia vs. the Balkans, but the "local community" vs. the "state". On the other hand, Mihelj (2004a, 436–437) argues that media support for the "people" and opposition to the "state" was based on the notion of Slovenia as a country of all blood-related Slovenes, and not as a country of all its inhabitants. According to the author, the call for less xenophobic media coverage could have shaken the dominant national imagination, but was met with general resistance as the media defended the "people". As a result, political representatives changed their tactics. They took into account some of the NGOs demands for a more liberal immigration policy, but simultaneously, they considered the will of the "people" and introduced more restrictive legislation (e.g., limiting the right to

12 Although in Slovenia, the dualism of "us" vs. "them" is predominant in the research field of "migration in the media", some authors, e.g. Jurić Pahor (2015), reveal an erosion of traditional binary (op)positions (e.g., whites/blacks, we/others, centre/periphery) through the examples from the arts (music and literature), which have emerged mainly in the multi-ethnic and border societies.

free movement). However, although some political representatives attempted to deny the "voice of the people", Erjavec (2003, 97) emphasises that they were primarily responsible for establishing xenophobia in the prevailing media discourse at the beginning of the second period when mirroring the police discourse.

In the third period, the privileging of the voice of the parliamentary political elite is documented in many cases. Pajnik (2016, 67–69) demonstrated how journalists did not reflect on the meanings of the terms they used. Just as politicians did not want to discuss the "razor wire", and preferred to use the "technical barrier" euphemism, so did the journalists. Similarly, the journalists uncritically adopted the definitions mentioned above of refugee and migrant rather than drawing attention to their implicit ideological assumptions. The voice of the parliamentary political elite also predominated in the *Odmevi*, the current affairs broadcast on the Slovenian national television. Although *Odmevi* allowed the topic to be examined from many angles, Luthar (2017) showed that the selection of guests in the interviews and their discursive treatment led to a narrowing of the debate to the perspective of the parliamentary political elite. Politicians appeared most frequently as guests in the studio or as the authors of statements in the news, most often from the right-wing political party SDS, while left-wing parties (ZL and SD) appeared less frequently. Furthermore, based on the analysis of the journalistic commentaries in *Delo* daily newspaper, Pajnik (2017) concluded that their content was placed in the prevailing political context. They addressed the European migration policy in the context of current political debates and omitted the NGO sources. Moreover, Jontes (2017) found that journalistic articles in the main Slovenian dailies (*Delo*, *Dnevnik* and *Večer*) most frequently cited official government sources, while representatives of the NGOs, volunteers, refugees and migrants rarely appeared as sources.

Marginalisation of the refugee voice

The marginalisation of the "refugee voice" (Sigona, 2014) refers to the neglect or absence of refugees and migrants in the prevailing media coverage at the verbal level (written or spoken text) and at the visual level (photos, videos). Such marginalisation has been documented both in Slovenia media representations (see references below) and in the print media of some other European countries (see Chouliaraki & Stolic, 2017; Georgiou & Zaborowski, 2017).

Hrvatina (2017) addresses the media representation of female refugees in Slovenian television coverage during the third period. The author finds that male refugees appeared most frequently (89%), while female refugees appeared very rarely (11%). The television news in which refugees appeared as interviewees included brief statements from multiple people or people

appeared in a group and complemented each other. However, when white individuals appeared in the news, the opportunity to speak was left only to them and was not fragmented as in the case of the refugees. Furthermore, in the case of the news programme *Dnevnik* broadcast on the Slovenian public television, Smrdelj & Vogrinc (2020) note that migrants were prevented from being one of the instances involved in the television communication process about them. Instead, they were reduced to a topic that others speak about (politicians, concerned villagers, police officers).

Bassin et al. (2002, 161–162) found that newspaper photographs from the second period depicted migrants at border crossings, in the basements of police stations, and in the private spaces of people who helped them cross the Slovenian border. Such locations in which migrants appeared emphasised their illegality. The migrants in the photographs squatted or lied on the ground, covering their faces or hiding them between their legs. The faceless representation reinforced their dehumanisation, undifferentiation, and loss of individual identity. Vezovnik & Šarić (2018)—using the example of Slovenian and Croatian public online portals in the third period—addressed a specific category of photographs dubbed "subjectless images" and depicting migrants and migrations, but not as subjects. Subjects were replaced by objects (e.g., fences, garbage, razor wires, vehicles, boundary fences) that stand metaphorically, metonymically, or symbolically behind migrants and migrations. There were photographs in which migrants were present but obscured, shown as a crowd or blurred, and photographs in which migrants were not shown at all.

SOCIAL MEDIA

Research on migration in social media uncovered a prevalence of an extremely xenophobic and racist discourse driven by the rapid flow of hostile and false information, where the opinions of (anonymous) individuals acquire a public character (Vogrinc, 2019, 145–147). Moreover, the highly negative stereotypical discourse on social media has the tacit support of the parliamentary political elite and consequently serves to legitimise the government security policy (see references below).

Although most studies focus on the third period, the first analysis appeared already in the second period. Kuzmanić (2001) discussed the so-called hate-page that was active at <http://bojkot.muba-bk.si/begunci> and published approximately 900 hateful graffiti during its existence. The webpage was introduced with the rhetorical question "How to get rid of refugees and asylum seekers?" followed by the answer "Give vent to your anger!". Anonymous users posted comments under pseudonyms calling migrants thugs, sloths, shirkers, criminals, stalkers, rapists, etc. The

comments also contained references to Hitler and Nazism. There were explicit tendencies to exterminate migrants and open concentration camps.

Fifteen years later, the same rhetoric was present in social media. Žagar (2018, 120–123) identified extremely explicit racist and xenophobic hate speech. As at the beginning of the millennium, there were incredibly dehumanising terms for refugees and migrants in the third period, and many allusions to Hitler and Nazism reappeared. Also, Vehovar et al. (2020) revealed a relatively high and stable proportion of online comments on the Facebook pages of selected Slovenian news portals containing the elements of the so-called "socially unacceptable discourse (SUD)".

The most comprehensive analysis of social media was conducted by Bajt (2016; 2018). The author notes that in the third period, several *pro et contra* groups were formed on Facebook, as action against those who spread hate speech was not taken by Facebook. When public condemnations of hate speech emerged (e.g., Zlovenia, *ibid.*, 56), a subtler articulation of the same views appeared. In the case of Twitter, the author highlighted the post by Sebastian Erlah, which called for the shooting of all arriving refugees and migrants. In addition to the highly inappropriate content of this post, a lack of response from the Slovenian political elite, police, and prosecutors was notable. Many organisations (e.g., the Alternative Academy [*Društvo alternativna akademija*] and the Slovenian Association of Journalists [*Društvo novinarjev Slovenije*]) spoke out and warned that online hate speech could lead to actual anti-migrant actions and hate crimes. Bajt (*ibid.*) argued that the lack of political condemnation in this and similar cases led to tacit support to the inappropriate content on social media, which simultaneously represented support to restrictive anti-migration securitisation measures. The author concluded that political actors and representatives at local, national and European levels were most responsible for the rise of hate speech about migration on social media. Similarly, Velikonja (2017) found that the hate speech and exclusionary activities of Slovenian politicians are no different from those of right-wing extremists, expressed in graffiti, at protests and rallies.

DISCUSSION AND CONCLUSION

I present the research field of "migration in the media" in Slovenia from the hybrid media system perspective. The object of analysis of most studies was one of the three periods of the mass arrival of refugees and migrants in Slovenia. A large part of the existing studies focuses on mass media, among which daily or weekly newspapers dominate. In addition, research on television coverage also appeared. Social media are

analysed less frequently than mass media. Methodologically, approaches related to discourse analysis and frame analysis predominate.

Media coverage of refugees and migrants is determined by the process of constructing the "other" in Slovenian society, which is established on a complex interweaving of nationalist discourse, security discourse, criminalisation discourse and humanitarian discourse. These discourses have different manifestations in the first, second and third periods of mass arrivals, and they dictate a predominantly xenophobic and stereotypically negative coverage. Moreover, refugees and migrants are often portrayed in the mass media as a security and cultural threat.

Research on social media reveals an extraordinarily xenophobic and racist discourse driven by the rapid flow of hostile and false information. Moreover, the extremely negative stereotypical discourse on social media has the tacit support of the parliamentary political elite and consequently serves to legitimise government security policy.

The social media content seems to be driven by hostile reactions to incoming refugees and migrants, which have support in the prevailing political rhetoric, which also guides mass media reporting. From this perspective, social media reinforces the prevailing mass media discourse privileging the voice of the parliamentary political elite and marginalising all other voices.

The central finding of the studies in focus—namely, a predominantly negative, stereotypical media discourse determined by the dominance of the voice of the parliamentary political elite—is in accordance with broader European research trends (see Pogliano, 2017; Consterdine, 2018; Eberl et al., 2018). But how should this key finding be contextualised in the research field of "migration in the media" in Slovenia? One possible explanation, however, could be in the fact that Slovenian studies mostly focus on the periods of most intense media coverage of refugees and migrants, which coincide with the periods of their mass arrivals. When the refugee and migrant issues are the central media topic, they are also interesting for researchers, but otherwise, they are not. It is rare that the object of an analysis are the periods of media coverage when the refugee and migrant issues are not the most exposed media topic (for exceptions see Kuzmanič, 1998 [1999]; Mlekuž (2006; 2007 [2011]; 2008 [2009a, 2009b, 2016]); Pajnik, 2007; Vidmar Horvat & Učakar, 2012; Vezovnik, 2015a [2015b]). In addition, Pajnik (2007; 2008) argues that in the media, a particular topic appears depending on the current social relevance and the occurrence of events related to it (e.g., the mass arrivals of refugees and migrants influence the fact that refugees and migrants are the most exposed media topic). It seems that the research dynamics in the field of "migration in the media" in Slovenia depends on a similar principle, as

the analysis of media representations of refugees and migrants focus on the periods of the greatest media exposure. However, it is important to note that the most intense media coverage is usually characterised by the most negative reporting. Drolc (2003, 164) explains that intense media coverage turns the issues of refugees and migrants into a "problem", "scandal", "crisis", etc. This influences the reaction of politicians and other involved, which is why the issue needs to be reported again. The so-called panic circle (van Dijk, 1991, 88) is created, which negatively affects the image of the group reported on in the media (van Dijk, 1991, 113). Therefore, since the predominant object of the analysis are the periods of the most intense media reporting of refugees and migrants in Slovenia, the finding of negative media coverage consequently prevails.

To ensure more diverse and representative contributions in the research field of "migration in the media" in Slovenia, it is necessary to study media representations of refugees and migrants more continuously in the future and not only during periods of the greatest media exposure when the reporting is the most negative. Moreover, the prevailing definition of refugee and migrant, which is mostly equated with a foreigner and the "other" in Slovenian society, needs to be broadened. Instead, the focus must also be placed on other groups of refugees and migrants.

Although the contemporary media landscape is defined by the online digital context, print mass media are still most frequently discussed, while online media content (online news, social media and interpersonal communication) is less frequently addressed. Considering that contemporary reality is highly mediated (see Couldry & Hepp, 2017), the still predominant preoccupation with traditional media does not seem to be a productive choice for further research. All types of media should be considered, and different media should be treated with different theoretical and methodological approaches.

Furthermore, in the studies in focus, mass media and social media are usually studied separately, although they are intertwined in the contemporary hybrid media system. The emergence of the Internet and new media technologies is responsible not only for the emergence and rapid penetration of social media, but also for the fundamental transformation of traditional mass media, whose content is available not only through traditional newspapers, radio and television but also through new media technologies. The transformation of the functioning of traditional mass media, the emergence of new media and communication technologies and their interaction is

made possible by the online digital context, which determines the hybrid character of the contemporary media. The latter are hybrid media (see Chadwick, 2013). Therefore, they should be addressed in their interaction and not separately.

The next research step is to examine mass media and social media together from the perspective of the (re)production, circulation, and reception of their contents. Wright (2014, 462) argues that social media has the potential to subvert the hierarchy of traditional mass media and allow refugees and migrants to create and control their own media image. But why does existing research on "migration in the media" in Slovenia find the opposite? How does the mass media in the hybrid media system still maintain the dominance of the voice of the political parliamentary elite? Why are refugees and migrants unable to establish an autonomous position in the public space through social media, from which they can speak for themselves, on their own behalf? It seems that despite earlier overly optimistic predictions about their democratic potential (Vehovar et al., 2020, 622–624), social media cannot shake the existing media hierarchy. I argue that the reasons for the hegemony of the political parliamentary elite should be addressed in research, which should be based on the interaction of different types of media, i.e., both mass and social media, in relation to the (re)production, circulation and reception of media content (see Klinger & Svensson, 2015).

In addition to the above research proposal, any gaps identified in this article should be addressed in further research. For example, the first mass arrival of refugees in Slovenia, namely Bosnian refugees, is subject of the least research attention, so it should be included in future analysis. Moreover, there is a lack of systematic and comprehensive comparative research between the first, second and third periods of most mass arrivals of refugees and migrants in Slovenia that should be conducted in the future. On the other hand, further research should focus on periods that do not coincide with mass arrivals and focus not only on foreigners but also on other people, such as "Slovenes from Sarajevo" and "Slovenes from Argentina". Research can also examine journalistic routine practices and their influence on obtaining official and alternative sources. Finally, there is also a lack of comparative research between the prevailing media discourse in Slovenia and other countries. The inclusion of the Slovenian case in comparative foreign studies would shed additional light on the similarities and its peculiarities compared to broader trends worldwide.

RAZISKOVANJE MIGRACIJ V SLOVENSkih MEDIJIH: "DRUGI" V OBDOBJU "KRIZE"

Rok SMRDELJ

Univerza v Ljubljani, Filozofska fakulteta, Oddelek za sociologijo, Aškerčeva cesta 2, 1000 Ljubljana, Slovenija
e-mail: rok.smrdelj@ff.uni-lj.si

POVZETEK

V članku predstavim rezultate prvega sistematičnega pregleda literature na temo migracij v slovenskih medijih z vidika hibridnega medijskega sistema. Predmet analize večine raziskav je eno od treh obdobij množičnih prihodov beguncev in migrantov v Slovenijo v letih 1992–1993, 1999–2001 in 2015–2016. Raziskave običajno tematizirajo množične medije, med katerimi prevladujejo dnevni ali tedenski časopisi, nekoliko manj pa je prisotno raziskovanje televizijskega poročanja. Družbeni mediji so v primerjavi z množičnimi mediji obravnavani redkeje. Metodološko prevladujejo pristopi, povezani z analizo diskurza in analizo okvirov. Poročanje množičnih medijev o beguncih in migrantih določa proces konstrukcije "drugega" v slovenski družbi, ki se vzpostavlja na kompleksnem prepletu nacionalističnega diskurza, varnostnega diskurza, diskurza kriminalizacije in humanitarnega diskurza. Ti diskurzi imajo v obdobju posameznih množičnih prihodov različne izrazne oblike, ki določajo pretežno ksenofobno in stereotipno negativno medijsko poročanje. Raziskave na temo družbenih medijev ugotavljajo prevlado zelo ksenofobnega in rasističnega diskurza, ki uživa tiho podporo politične elite in nastopa v funkciji legitimacije sekuritizacijskih vladnih ukrepov.

Ključne besede: begunci, migranti, množični mediji, družbeni mediji, hibridni medijski sistem, kriza

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COOPERATION BETWEEN LOCAL COMMUNITIES AND THE CIVIL
PROTECTION IN OVERCOMING THE COVID-19 CRISIS:
AD OMNIA PARATI SUMUS

Vladimir PREBILIČ

University of Ljubljana, Faculty of Social Sciences, Kardeljeva ploščad 5, 1000 Ljubljana, Slovenia
Municipality of Kočevje, Ljubljanska cesta 26, 1330 Kočevje, Slovenia
e-mail: vladimir.prebilic@fdv.uni-lj.si

Simona KUKOVIČ

University of Ljubljana, Faculty of Social Sciences, Kardeljeva ploščad 5, 1000 Ljubljana, Slovenia
e-mail: simona.kukovic@fdv.uni-lj.si

ABSTRACT

The unprecedented strike of the COVID-19 pandemic and the resulting aftermath pose profound challenges for local governments, from managing responses, to an unknown crisis, to ensuring the safety of citizens in the midst of extreme uncertainty. The paper discusses the management of the COVID-19 crisis, focusing on the cooperation between Slovenian municipalities and the established civil protection system. Civil protection and emergency preparedness to cope with natural, technological and other disasters is a key component of any local community. The authors examine the normative framework of the civil protection system in the Republic of Slovenia and offer insights into the results of the first empirical study to evaluate civil protection regulations, emergency response, and operations at the municipal level during the response to the COVID-19 crisis.

Keywords: local community, civil protection, emergency response, COVID-19, Slovenia

COOPERAZIONE TRA LE COMUNITÀ LOCALI E LA PROTEZIONE CIVILE PER
SUPERARE LA CRISI RELATIVA AL COVID-19:
AD OMNIA PARATI SUMUS

SINTESI

Il colpo senza precedenti della pandemia relativa al COVID-19 e le conseguenze che ne derivano pongono profonde sfide ai governi locali: dalla gestione delle risposte, a una crisi sconosciuta, per garantire la sicurezza dei cittadini che si trovano in una situazione di estrema incertezza. Il documento discute la gestione della crisi relativa al COVID-19, concentrandosi sulla cooperazione tra i comuni sloveni e il sistema di protezione civile esistente. La protezione civile e la preparazione alle emergenze per far fronte a disastri naturali, tecnologici e di altro tipo è una componente chiave di qualsiasi comunità locale. Gli autori esaminano il quadro normativo del sistema di protezione civile nella Repubblica di Slovenia e offrono approfondimenti sui risultati del primo studio empirico per valutare le normative di protezione civile, la risposta alle emergenze e le operazioni a livello comunale durante la reazione alla crisi relativa al COVID-19.

Parole chiave: comunità locale, protezione civile, reazione all'emergenza, COVID-19, Slovenia

INTRODUCTION¹

People have always tried to understand and explain natural processes. With the development of science, mankind is no longer content to understand these phenomena, but takes on the role of predictor and manager. Despite advanced science and technology enabling humanity to anticipate changes, challenges and – not least – threats, the dimensions and consequences of natural, technological and other disasters can still surprise us. In modern societies, non-military security risks represent the most common form of security challenges. The latter could also be observed in the Republic of Slovenia, which has been put to the test of managing natural and other disasters several times during the thirty years of its independence. Thus, Slovenian newspapers have reported on earthquakes, floods, landslides, hailstorms and devastating storms, ice disasters with sleet and other environmental disasters related to (self-)ignition of chemical factories and landfills. Even though the territory of the Republic of Slovenia is not equally vulnerable to the listed natural disasters due to its geographical location and spatial diversity, crisis situations endangering human life and/or health cannot be avoided, as (especially recently) natural disasters (such as sewage sludge disposal and pollution of (drinking) water) occur far too frequently because of reckless human behaviour. The consequences of such disasters are felt most strongly in local communities, and it seems that Slovenian communities are somehow used to managing and resolving crisis situations. Moreover, the protocols of the civil protection and rescue system are well established.

Nevertheless, 2020 brought a significant challenge of a magnitude that could not have been foreseen on March 4, when the first infection was detected in Slovenia, even considering the scenes from abroad that we followed via the Internet and television. The coronavirus disease SARS-CoV-2 posed at least a triple challenge, namely 1) it was a completely new phenomenon, unknown to the medical profession; 2) the disease spread throughout the entire population, which meant that – unlike natural and other disasters – its effects were not spatially limited and therefore required simultaneous activation of protection and relief forces throughout the country; and 3) the lack of experience with the disease and the rapid changes in lifestyles triggered various emotional reactions in people – from fear and anxiety to anger and loss of trust in the “crisis managers”, which undoubtedly included representatives of local communities and civil protection.²

Municipalities reacted quite quickly to the emerging situation and took a place-based approach to response

policies;³ at the same time, they also implemented national measures in response to the crisis COVID-19 (such as mandatory use of face masks and other protective equipment, restrictions on movement, lockdowns, etc.), with protective and auxiliary forces playing an important role, especially the Civil Protection. The paper discusses the management of the COVID-19 crisis, focusing on cooperation between Slovenian municipalities and the Civil Protection. Civil protection and emergency preparedness to cope with natural, technological and other disasters is a key component of any local community. In the first part of the paper, we analyse the normative framework for protection against natural and other disasters in the Republic of Slovenia using a descriptive method, focusing on the civil protection system. In the second part of the paper, we present the qualitative and quantitative data from the first post-crisis research, which deals with the evaluation of the cooperation of local municipalities with Civil Protection in dealing with the COVID-19 crisis. Based on the responses of mayors and participatory observation, we conclude the paper with reflections on how to improve the existing system of (cooperation) between local communities and the protection and rescue forces.

THEORETICAL AND NORMATIVE FRAMEWORK FOR THE REGULATION OF THE CIVIL PROTECTION SYSTEM IN THE REPUBLIC OF SLOVENIA

The term “civil protection” is used worldwide to describe activities to protect civilians from incidents and disasters (Mauro, 1996). This phenomenon has evolved from the earlier philosophy of civil defence, which represented control over the civilian population in the event of actual or potential aggression and, similar to all situations where operations were conducted under wartime pressure or hostility, placed great emphasis on authoritarian techniques of governing and restricting personal freedom. In contrast, civil protection has moved away from the methods of command and control and relies on cooperation and information sharing (Masri & Moore, 1995), which is one of the main differentiators between civil protection and civil defence concepts (Alexander, 2002). Today, civil protection is primarily seen as an umbrella under which various emergency services find their shelter; an organisational tool for coordinating emergency services, public enterprises, and institutions at the state and local levels; and an umbrella that still represents the international legal protection for those concerned with the protection of civilians due to military operations. Under this umbrella, the title “(system of) protection and rescue” was introduced, in

1 The study was created as part of the following two projects: “Response to the COVID-19 pandemic in a comparative perspective: organization, coordination and improvisation”, Defence Science programme group, ARRS code P5-0206, and “Climate Related Natural Disasters and the Response of the Protection, Rescue and Assistance System in the Republic of Slovenia”, ARRS code V5-2150.

2 Substantive explanation: in the study we use the term “civil protection” with the two following meanings. Written with a lowercase letters the term is understood as a general concept of protection of the population, while capitalised “Civil Protection” indicates the name of organised forces for rescue, protection and relief.

3 More on the place-based approach in Hambleton (2011); Brezovšek and Kukovič (2014); Kukovič (2015).

contrast to the system of protection from natural and other disasters, which is a somewhat broader concept (Jeraj, 2014, 106).

According to European Union (Council of the European Union, 2021), civil protection includes preventive measures to reduce the impact of future emergencies or disasters and the assistance that a government provides to the population in need after an emergency or natural disaster. Countries hit by major disasters are often overwhelmed and their response capacity is limited. A coordinated response at EU level is therefore essential to ensure that aid reaches where it is needed and to avoid duplication of relief efforts. The Union Civil Protection Mechanism coordinates the response to natural and man-made disasters at EU level. The Mechanism has three objectives: a) to foster cooperation between national civil protection authorities, b) to raise public awareness and improve preparedness, and c) to enable rapid, effective and coordinated assistance to the affected population. The Mechanism was first established in 2001 and reformed in 2013 to focus on disaster prevention and preparedness.

In Slovenia, civil protection is a special part of the system of protection against natural and other disasters, which includes administrative bodies, forces, services and facilities for rescue, protection and assistance (Protection against Natural and Other Disasters Act, 1994). Thus, Civil Protection belongs to the rescue, protection and relief forces provided in the event of natural or other disasters, which are the available capacities of the state, local communities, enterprises, institutions or other organisations for protection, rescue and relief. These forces are designed to provide first aid and emergency medical care, assist vulnerable and affected populations, provide first veterinary aid, extinguish and rescue fires, rescue from debris, landslides and snow avalanches, assist in floods and other weather disasters, as well as ecological and other disasters at sea, in rivers and lakes, etc. As far as the participation and involvement of citizens is concerned, rescue, protection and relief forces are voluntary (e.g. volunteer fire brigades, Red Cross, Caritas), professional (fire brigades, ambulance services) and mandatory, which includes the Civil Protection forces of the Republic of Slovenia and first aid forces; otherwise they can function as a combination of professional and voluntary members (Government of the Republic of Slovenia, 2021). In the event of natural and other disasters, these forces are activated in stages: first, forces are mobilised at the municipal level, then forces from neighbouring municipalities, and finally forces operating at the national level, depending on the scale and nature of the disaster.

The system of protection, rescue and assistance falls within the competence of the Government of the Republic of Slovenia, more specifically the Ministry of Defence, where administrative and professional tasks are performed by the Administration of the Republic of Slovenia for Civil Protection and Disaster Relief, which operates as an institution within the Ministry and performs administrative and professional tasks of protection, rescue

and assistance. The coordination of work is carried out within an operational structure of 13 regional information centres with 13 offices, which operate in the form of a 24-hour on-call service and represent an efficient service for assistance, rescue and support in the event of natural or other disasters (Prebilič, 2022).

If we analyse the system of protection against natural and other disasters in the Republic of Slovenia in a somewhat broader context, we find that it is a unified and comprehensive system managed by the state and local communities, which, within the framework of a specific subsystem of national security, ensure the protection of people, animals, property, cultural heritage and the environment with the main objective of reducing and preventing disasters and, above all, the occurrence of victims. The legal basis is found in the Protection against Natural and Other Disasters Act (1994), which defines protection against natural and other disasters as a right and duty that falls within the competence of the state, municipalities, citizens and other residents of Slovenia, public emergency services, companies, institutes and organisations, as well as volunteers organised in associations, professional bodies and non-governmental organisations engaged in activities relevant to protection against natural and other disasters. The basic principles of the system are aimed at taking preventive protective measures and ensuring mutual and international assistance and responsibility. The legal framework provides for a general responsibility of the state and local communities to provide publicity and inform the population about disasters and, in the case of natural and other disasters, provides for a phased approach that defines the deployment of forces and resources hierarchically.

In addition to the Protection against Natural and Other Disasters Act (1994), uniform principles and approaches to the protection and safety system are also set out in other normative documents. For example, The Doctrine on Protection, Rescue and Relief (2002) stipulates that the primary responsibility of the state is focused on regulating the system and planning development and research work, preparing protection and rescue plans, and implementing monitoring, information and warning systems. According to the Doctrine and for the purpose of efficient management, planning and implementation of the basic tasks of the system, the state is divided into regions within which are organised professional services, management, rescue and relief bodies, units, services and Civil Protection facilities, logistics centres and other operational structures that play a key role in the protection and rescue system (The Doctrine on Protection, Rescue and Relief, 2002). In addition, the Resolution on the National Programme for Protection against Natural and Other Disasters 2016–2022 (2016), based on the Resolution on the National Security Strategy of the Republic of Slovenia (2010), represents a strategic programme that focuses primarily on prevention as a more effective and, in the long term, also less costly form of protection from natural and other disasters. The resolution promotes system improvements such as the development of infrastructure sy-

stems, especially information and communication systems, and the improvement of conditions for the functioning of services, departments and other formations organised by associations and other non-governmental organisations for rescue, protection and assistance.⁴

Another important document is National Protection and Rescue Plan in the event of a communicable disease epidemic or pandemic with humans (2016), which describes the action protocols for the prevention and management of infectious diseases, the system of organisation, activation, management and control of rescue, protection and assistance forces, the method of observation, information, alerting and the implementation of protective measures and rescue, protection and assistance tasks. The national plan constitutes a basic plan for protection and relief measures in the event of an epidemic or pandemic of a communicable disease and is intended for use in the event of the declaration of an epidemic or pandemic of a specific communicable disease in humans. According to the provisions of the Communicable Diseases Act (1995), an epidemic in the Republic of Slovenia is declared by the Minister of Health or the Government of the Republic of Slovenia if the infected or endangered area is the size of the entire Republic of Slovenia. The preparation and coordination of the plan is the exclusive responsibility of the state or the Ministry of Health, which is reflected in the fundamental responsibility of the state for the normative regulation of the protection and assistance system. In addition to the Ministry, the National Institute of Public Health the Republic of Slovenia and regional health care institutions play an important role. In the event of natural and other disasters, the Act also provides for the participation of the army and the bodies and units for protection, rescue and assistance as duty bearers.⁵ This plan is activated on the proposal of the Minister of Health when additional forces, protection and relief resources need to be requested in addition to the health services. The plan is activated by the Civil Protection Commander of the Republic of Slovenia, and with it other regional and partly municipal plans are activated if the epidemic affects the whole country.

The Civil Protection of the Republic of Slovenia is therefore an important factor in the protection and rescue of the population in the event of natural disasters and outbreaks of communicable diseases. The Doctrine on Protection,

Rescue and Relief (2002) states that Civil Protection acts as a complementary force of the rescue, protection and relief system at the level of the state, municipalities and enterprises, institutions and organisations in accordance with threat assessments and uniform rules for organisation, equipment and training. Civil Protection is organised as an independent unit at the level of the state, regions, municipalities, sectors or locations and enterprises, institutions and other organisations. The governing body of the Civil Protection is the commander, who is appointed at the national level by a decision of the Government of the Republic of Slovenia and at the level of municipalities by a decision of the mayor. The main task of the commander is the appointment of the Central Civil Protection, which acts as a specialised service and supports the commander in the management and implementation of operational and professional tasks of protection and assistance (Jeraj, 2018).

We have clearly demonstrated that the concept of civil protection is firmly embedded in the protection and rescue system and that Civil Protection forces are an important part of any local community. Since the critical element in dealing with crisis situations is response time, effective activation and coordination of forces, as well as coordinated action of the actors involved are of crucial importance. In the Slovenian history, cooperation between local communities and civil protection forces has repeatedly proven to be synchronous and successful. In the next chapter, we put an emphasis on the mitigation, management and response to an unprecedented crisis caused by the global SARS-CoV-2 virus pandemic.

EVALUATION OF THE COOPERATION OF LOCAL COMMUNITIES AND CIVIL PROTECTION IN OVERCOMING THE COVID-19 CRISIS

The first suspected case of SARS-CoV-2 coronavirus infection was detected in Slovenia on 4 March 2020 and officially confirmed on the same day. In accordance with the protocol of National Protection and Rescue Plan in the event of a communicable disease epidemic or pandemic with humans (2020), the competent services searched for contacts of the infected person and informed the public about the occurrence of this new, then unknown disease. Due to the unstoppable spread of the virus among the po-

4 Further development of protection and rescue forces should be based primarily on volunteering, modular organisation and adaptability to the actual situation, while promoting awareness-raising and training of the population for personal and mutual assistance. The state is striving to ensure that the development of the protection and rescue system in the future would focus at more efficient and better organisation of the Civil Protection services. With this Resolution, the state also ensures the supply of material for the public services involved in the protection and aid system. See Resolution on the National Programme for Protection against Natural and Other Disasters 2016–2022 (2016) and Prebilič (2022).

5 Version 1.0 of this plan was created because of the Risk assessment of the Republic of Slovenia in the event of communicable diseases with humans (2016), which is designed for cases of outbreaks or occurrence of epidemics or pandemics of communicable diseases with humans and the possibility of spreading across national borders. The amendment to the National Protection and Rescue Plan in the event of a communicable disease epidemic or pandemic with humans was created in 2020 as a response to the experience in coping with the epidemic of the coronavirus disease with humans during the first wave. Version 2.0 defines that an epidemic is not only a significant public health issue, but also a broader social problem, as its magnitude jeopardises human health and life (see National Protection and Rescue Plan in the event of a communicable disease epidemic or pandemic with humans, version 2.0, 2020). Ministry of Health prepared the Health preparedness plan for the epidemic/pandemic of a communicable disease (2020), which describes the phases and scenarios of the epidemic, key stakeholders and their roles in curbing the epidemic and the epidemic management system while touching the primary, secondary and tertiary levels of healthcare. See also Prebilič (2022).

pulation, eight days later, on 12 March 2020, the Minister of Health⁶ declared an epidemic of a contagious disease on the entire territory of the Republic of Slovenia. The next day (13 March 2020), the Commander of the Civil Protection Headquarters of the Republic of Slovenia activated the National Protection and Rescue Plan in the event of a communicable disease epidemic or pandemic with humans (2020), activating regional and (partly) municipal protection and rescue plans. The first wave of the COVID-19 epidemic broke out very quickly in Slovenian municipalities, partly due to an unfortunate timing that coincided with the return of (COVID-19 infected) citizens from abroad after the winter holidays, which led to the local spread of the disease, especially in kindergartens, primary and secondary schools and among medical staff; later, the virus also entered nursing homes for the elderly. In the absence of a unified response to the (crisis) situation, communities had to adopt improvised measures and responses, leading to many paradoxes and corresponding actions.

The COVID-19 crisis is extremely demanding, causing deaths and endangering lives. Moreover, the disease leaves long-term consequences on the mental and physical health of people and affects the lifestyle of individuals, disrupts education, the arts, restricts human rights, alters social discourse, and has a massive impact on interpersonal relationships affecting the psychological state of individuals and society. As these are universal threats that cross physical, temporal and social boundaries, they require a joint response from countries, international institutions and non-governmental organisations. Nevertheless, Malešič (2021, 67) notes that we have witnessed the nationalisation of various policies and the erosion of crisis management tools, which leads to various paradoxes. The European Union, for which the COVID-19 crisis is the third crisis in the last decade, was also late with a common, unified response. Brglez et al. (2021, 82) describe that it took the EU more than three years after the last economic crisis to develop a unified response to possible future economic crises, while common solutions to the migrant crisis are still not fully resolved. In fact, the EU did not address the COVID-19 health crisis strategically, but focused on day-to-day measures to contain the crisis, disappointing (again) the people and member states who depended on their own innovation.

As our analysis focuses on the cooperation between Slovenian municipalities and the established civil protection system regarding COVID-19 crisis, we should devote some attention also to the local government itself, being the level of authority closest to the citizens. Its role is to represent the meaning and views of the local community. The exercise

of local self-government is a demanding task that primarily relates to the division of competences between the state and the municipality as the only local government unit in Slovenia (Kukovič et al., 2016, 303–306). According to the Local Self-Government Act (2007, Article 21), the municipality is responsible for organising rescue and relief operations in the event of natural and other disasters with a view to protection and rescue, as well as for managing all local matters of public importance.⁷ Based on the aforementioned responsibilities, local governments responded to the COVID-19 crisis in different ways, intervening on the basis of ordinances and measures in many areas, such as closing schools, restricting movement, prohibiting visits to nursing homes, prohibiting the use of public inventory and land, to name only the most common measures. Regardless of the different responses and measures, the activation, presence and work of regional and local Civil Protection headquarters have been a constant feature in ensuring protection and assistance in local communities.

Research methods

The main research method was the survey among the mayors of Slovenian municipalities, conducted between 15 June and 15 July 2021. The invitation to the survey was sent to all mayors (212), of which 76 mayors decided to participate, representing 36 percent of the mayoral population (more on the survey in Kukovič, 2021).⁸ The time frame of the analysis referred specifically to the first (spring 2020) and in smaller part also for the second (autumn and winter 2020–21) waves of the COVID-19 epidemic. The survey was divided into two parts. The first part contained closed-ended questions and the second part contained open-ended questions. While all 76 mayors answered the first part of the survey, some chose not to answer the second part, while others answered this part in particular detail. Prior to the survey, we conducted a smaller number of interviews with selected mayors to test the validity and meaningfulness of the questions. We also used a qualitative research method of participant observation, where authors were not only observers of the research participants but were also actively engaged in the activities of the research participants.⁹

Analysis

According to mayors, municipal management teams met with representatives of health facilities and civil protection headquarters to discuss and decide on measures aimed primarily at raising awareness and educating staff in

6 The Order on the declaration of the COVID-19 epidemic in the territory of the Republic of Slovenia (2020) was signed in compliance with Article 7 of the Communicable Diseases Act (1995).

7 Haček (2020, 87–88) explains that Slovenian municipalities are not responsible for performing all public functions in their territory, unlike e.g., in Germany, but only for matters of local importance. In this respect, Slovenian legislation is similar to the French arrangement.

8 We would like to thank all the participating mayors for sharing their experiences, which significantly contributed to the understanding of the studied topic.

9 In terms of full transparency, we should reveal that one of the authors is not only academic, but also long-term mayor of large Slovenian municipality, that was actively engaged in analysed crisis.

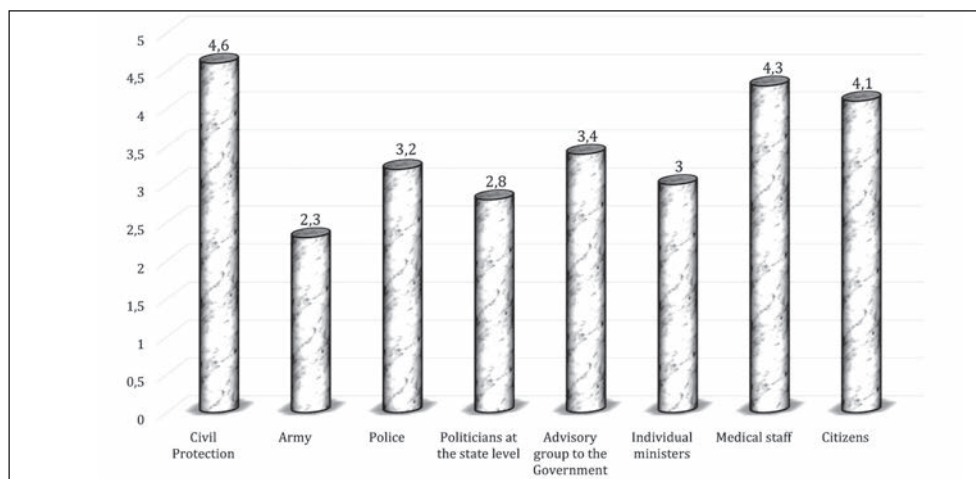


Figure 1: The most helpful stakeholder to municipalities during the COVID-19 crisis.

critical infrastructures, as well as citizens and the public. The Civil Protection Headquarters played an important role at this point, as (in addition to the internal organisation and structure of the individual units) it also developed clear guidelines for action and response in the event of the occurrence of the disease in the local environment, which is crucial for a rapid response and activation of all stakeholders in crisis situations.

Therefore, we asked mayors who was most helpful to municipalities during the SARS-CoV-2 coronavirus epidemic. Using a rating scale, mayors rated eight stakeholders involved,¹⁰ of which Civil Protection received the highest rating. No less than 92 percent of respondents rated the use of Civil Protection as a 4 or 5 (latter being the highest rating), while the average rating was 4.6.

In a next step, we asked the mayors to rate the municipality's collaboration with the forces of Civil Protection during the COVID-19 crisis for each of the hierarchical levels (national, regional and local), using a rating scale from 1 to 5, where 1 meant a negative and 5 meant an excellent. The results in Table 1 show that cooperation with Civil Protection is encouraging according to mayors at all three levels, as the average rating was above arithmetic mean at all three levels.

Mayors rated cooperation with the national Slovenian headquarters Civil Protection with an average score of 4, while cooperation with the regional forces of Civil Protection was rated even higher (average score 4.5); 91 percent of mayors rated the cooperation as excellent or very good. Mayors gave the highest score (average score 4.9) to cooperation with the municipal forces of Civil Protection, which was rated as excellent in 93 percent

of cases. At this point, we add another conclusion of our survey, namely that we also perceived a high level of trust on the part of the mayors in the representatives of Civil Protection.¹¹ The information presented by the representatives of Civil Protection was perceived as credible and, as such, was used as a basis for decision-making on certain actions. We were thus able to establish encouraging relations between the municipal administration and the Civil Protection forces, which indicates a coordinated and synchronous cooperation: a crucial condition for solving and managing crisis situations.

In the analysis of the normative framework, we already mentioned the established protocols and the order of activation of the Civil Protection forces, noting that, on the one hand, it is a hierarchical system, as the Civil Protection forces are activated gradually at different levels from the local to the national level; at the same time, the Civil Protection system is also centralised, as the administration and delegation is also carried out by the Civil Protection Headquarters of the Republic of Slovenia. Based on the experience of responding to the COVID-19 crisis, we asked the mayors whether, in their opinion, the current normative framework for the relationship between Civil Protection and the municipalities is adequate. From their responses, we were able to conclude that mayors were generally supportive of the existing regulation of the relationship between Civil Protection and municipalities, as 98 percent of the responses were positive. Nevertheless, some individuals added that the normative framework for relations between Civil Protection and the municipalities needs to be modernised in certain segments, especially so that both institutions can respond more effectively

¹⁰ The mayors rated individual actors using a scale of 1 to 5, where a value of 1 meant "not helpful" and a value of 5 meant "very helpful". In addition to the Civil Protection, the following stakeholders were assessed: the Army (2.3), the Police (3.2), politicians at the state level (2.8), the advisory group to the Government of the Republic of Slovenia (3.4), individual ministers of the Government of the Republic of Slovenia (3.0), medical staff (4.3) and citizens (4.1). Average rating values are provided in parentheses.

¹¹ Haček and Brezovšek (2014, 3) explain that the trust people have in the representatives of a certain institution generates trust in the entire institution.

Table 1: The municipality's collaboration with the forces of Civil Protection during the COVID-19 crisis.

		EXCELLENT	VERY GOOD	GOOD	SATISFACTORY	NEGATIVE	AVERAGE
		5	4	3	2	1	
1	Slovenian headquarters Civil Protection	45 %	20 %	29 %	3 %	3 %	4
2	Regional forces of Civil Protection	57 %	34 %	7 %	2 %	/	4.5
3	Municipal forces of Civil Protection	93 %	2 %	5 %	/	/	4.9

to upcoming challenges and crises, when less improvisation is required compared to the situation during the epidemic. Indeed, the mayors pointed out that we have a well-developed system for crisis management during natural disasters, with everything running smoothly; in contrast, the protocol for health crises was not sufficiently developed and there was no scenario for such cases. One of the mayors described the situation as follows:

An epidemic of this magnitude was not expected in our country and therefore there were no preventive measures and no advance planning. Many municipal administrations did not even know who was responsible for what and how to deal with the crisis situation; some did not even know what the responsibilities of the Civil Protection were and what the responsibilities of the mayor and the municipal administration were. At the beginning of the crisis, some even competed with each other as to who would propose the "more attractive measures" that would attract more sympathy. Time has shown that such measures were neither useful nor harmful, but if the consequences of the epidemic were more severe, such as long-term disruption of supplies and the like, such "posturing" could pose a serious threat to the work of members of Civil Protection and other important economic and public services. Fortunately, there were still relatively few patients, life was largely paralysed, and the supply of essentials and public goods was not interrupted. (see Kukovič, 2021)

Because the COVID-19 crisis is specific and more challenging than natural disasters and other localised disasters due to its health component, scale, and other factors, some mayors consider the current role of the local Civil Protection chief commander somewhat inappropriate. Normally, only veterinarians are part of the Civil Protection forces, but in the spirit of classical medicine, it was necessary to activate medical personnel and involve health professionals as much as possible in the crisis units to effectively design and plan mitigation measures for the COVID-19 crisis.

In practise, it has been shown that the current system of civil protection, according to which the commander of the Civil Protection at the municipal level is supposed to be responsible for protection and rescue and take appropriate measures, is somewhat problematic. The commander of Civil Protection at the municipal level can implement tasks and take care of their coordination on the ground; however, more specific formalised cooperation between the mayor and the municipal administration is clearly needed when planning actions. During the epidemic COVID-19 the mayor appointed a municipal crisis team (as an advisory body to the mayor) to monitor the situation and help plan actions; actions were then decided jointly by the mayor and the commander of Civil Protection. The commander of Civil Protection and the mayor can hardly take measures alone; therefore, a joint body is needed where all necessary actors meet regularly and prepare the necessary measures. (see Kukovič, 2021)

From this point of view, according to the mayors, the Civil Protection and its commander cannot take full responsibility for managing such a crisis, but they can indeed provide the necessary logistical and informational support. According to the mayors, the key feature of the Civil Protection forces was to ensure communication, as they provided the communities with the necessary information in the first phase and later also played an important role in the purchase and distribution of protective equipment. One of the mayors described the role of Civil Protection as follows:

We would like to mention their first action, when all municipalities in Slovenia were informed about the disease and the possible role of municipalities in solving a possible epidemic even before the first infection. In this way, municipalities were able to review their resources and means of protection and rescue and prepare initial preventive measures for the population. (see Kukovič, 2021)

To this we would like to add that several mayors highlighted as an example of excellent practise during the COVID-19 crisis the exemplary and effective cooperation of municipalities with municipal (local) and regional Civil Protection headquarters and with the Civil Protection headquarters of the Republic of Slovenia; this applies to the period of preparation for the crisis and later in the provision of protective materials, the organisation and implementation of rapid tests, mass vaccination of employees in the (local) economy and citizens. According to the mayors, the forces of Civil Protection quickly adjusted to the scale of the new, unknown crisis and addressed it – with some improvisation – in accordance with the doctrine of protection and assistance to civilians in local communities.

DISCUSSION AND CONCLUSIONS

Despite efforts to improve our understanding and prediction, natural disasters and other catastrophes still manage to take us by surprise. The more unprepared we are for these events, the greater devastation and more serious consequences we are left with. One such example was (and still is) the public health COVID-19 crisis that required improvisation and ingenuity despite elaborate plans, adopted doctrines, and clear protocols for activating protective and relief forces. The unprecedented blow of the COVID-19 pandemic, particularly during the first wave, presented profound challenges to Slovenian local governments, from managing responses to an unfamiliar crisis situation to ensuring the safety of citizens in the midst of extreme uncertainty. Local communities, usually accustomed to responding quickly to natural disasters and other spatially limited disasters, once again organised themselves quite quickly by establishing crisis teams and activating the Civil Protection forces. In the present study we have dealt precisely with the former, namely with the involvement of Slovenian municipalities and Civil Protection forces. In the first part, we analysed the normative framework of the Civil Protection regulation in the Republic of Slovenia; in the second part, on the other hand, we presented the results of the first survey among the mayors of Slovenian municipalities to combat the coronavirus pandemic.

Based on the conducted research as well as participant observation, we found that the mayors evaluate the cooperation of the municipalities with the Civil Protection Headquarters at the local and regional level as well as with the national Civil Protection Headquarters of the Republic of Slovenia as both positive and effective. Furthermore, they emphasise the key role of Civil Protection forces in providing information and

communication during preparations for the crisis and later in providing protective equipment, organising and conducting rapid tests and mass vaccinations. At the same time, the mayors agree that this crisis has also revealed several shortcomings that provide an opportunity to improve the existing system of (co-)operation of local communities and protection and rescue forces.

Based on a specific crisis we conclude the study by considering possible policy adaptation and upgrades in the protection and rescue system in at least the following segments:

- To unify the organisational system of Civil Protection forces at the municipal level by defining the responsibilities between the different levels of government more precisely.
- redefine the role and responsibilities (of management) of the Civil Protection in (especially in) a health crisis and establish closer formal cooperation between the mayor, the commander of the Civil Protection and other key actors in the management of a crisis.
- develop an action plan and scenario simulations for larger scale (health) crises that are not spatially limited.
- involve local communities in the development and simulation of action plans by establishing a community crisis team and clarifying and dividing responsibilities in advance in the event of crisis situations.
- strengthen the role and involvement of Civil Protection in communication channels and modernise and improve the flow of information.
- review the HR and financial aspects of crisis management affecting local municipalities, as (especially smaller) municipalities are unable to provide sufficient resources.

The analysis of historical sources shows that mankind has had to deal with various crisis situations from the very beginning, while the earlier crisis situations rarely pose a (serious) threat in today's world. This will probably continue to be the case in the future, but we must not overlook the fact that crisis situations are becoming increasingly complex, comprehensive and formidable; both most recent crises, economic and the coronavirus SARS-CoV-2 health crisis, were (and still are) very much of global nature. Therefore, it is particularly important to transform the experience gained in the crisis into knowledge and improve the protection and rescue system. So, according to the doctrine of civil protection, we will *ad omnia parati sumus* (be prepared for everything).

SODELOVANJE LOKALNIH SKUPNOSTI IN CIVILNE ZAŠČITE V PREMAGOVANJU
COVID-19 KRIZE: *AD OMNIA PARATI SUMUS**Vladimir PREBILIČ*

Univerza v Ljubljani, Fakulteta za družbene vede, Kardeljeva ploščad 5, 1000 Ljubljana, Slovenija
Občina Kočevje, Ljubljanska cesta 26, 1330 Kočevje, Slovenija
e-mail: vladimir.prebilic@fdv.uni-lj.si

Simona KUKOVIČ

Univerza v Ljubljani, Fakulteta za družbene vede, Kardeljeva ploščad 5, 1000 Ljubljana, Slovenija
e-mail: simona.kukovic@fdv.uni-lj.si

POVZETEK

Kljub napredni znanosti in tehnologiji, ki človeštvu omogoča predvidevanje sprememb, izzivov in nenazadnje groženj, nas razsežnosti in posledice naravnih, tehnoloških in drugih nesreč še vedno presenečajo. Tudi leto 2020 je prineslo velik izziv, katerega razsežnosti ob zaznavi prve okužbe ni bilo mogoče povsem predvideti. Udarec neprecedenčne pandemije COVID-19 in posledice, ki so sledile, tako predstavljajo lokalnim skupnostim velike izzive, od obvladovanja odzivov na neznano krizno situacijo do zagotavljanja varnosti občanov v času skrajne negotovosti. Članek obravnava premagovanje COVID-19 krize z vidika sodelovanja slovenskih občin in vzpostavljenega sistema civilne zaščite. Civilna zaščita in pripravljenost na izredne razmere, ki nastanejo kot posledica naravnih, tehnoloških in drugih nesreč, je namreč ključna komponenta vsake lokalne skupnosti. Avtorja v članku analizirata normativni okvir ureditve sistema civilne zaščite v Republiki Sloveniji ter ponujata vpogled v rezultate prve empirične raziskave o oceni ureditve, odziva v sili in delovanja sistema civilne zaščite na lokalni ravni v boju s COVID-19 krizo. Pri tem ugotavljata, da župani sodelovanje občin s štabi Civilne zaščite na lokalni, regionalni, pa tudi z nacionalnim Štabom Civilne zaščite Republike Slovenije, ocenjujejo kot pozitivno in učinkovito. Pri tem posebej izpostavljajo ključno vlogo enot Civilne zaščite pri informiranju in komuniciranju v času priprav na krizo, kasneje pa pri dobavljanju zaščitne opreme, organizaciji in izvedbi hitrega testiranja ter tudi pri izvedbi množičnega cepljenja. Hkrati pa je ta kriza pokazala tudi nekaj pomanjkljivosti, kar ponuja priložnost za nadgradnjo obstoječega sistema (so)delovanja lokalnih skupnosti ter sil zaščite in reševanja.

Ključne besede: lokalna skupnost, civilna zaščita, odziv v sili, COVID-19, Slovenija

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KAZALO K SLIKAM NA OVITKU

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INDEX TO IMAGES ON THE COVER

FRONT COVER: "A Confined Place" collection of artworks and photos created in times of pandemic confinement by students of La Salle School of Architecture and Nova University of Lisbon, 2020 (A-Place project, Creative Europe, <https://www.a-place.eu/>) (Photo: Irene de la Garza).

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