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T E M A T S K I   S K L O P

LIFESTYLE MIGRATION  
ŽIVLJENJSKO-STILSKE MIGRACIJE

T H E M A T I C   S E C T I O N





## EDITORIAL

Michaela BENSON<sup>I</sup>, Nataša ROGELJA<sup>II</sup>

This thematic section is focused on lifestyle migration, a social phenomenon that foregrounds the role of lifestyle considerations within migration (Benson and O'Reilly 2009; Knowles and Harper 2009). For the large part, this theoretical and conceptual framework has been used to explain the migration of the relatively affluent and is part of a more general shift within migration studies to increase the visibility of the migration of the more privileged, a population flow that, as Amit (2007) has argued, is poorly understood and collectively conceptualized. It has precursors—international retirement migration, leisure migration, counterurbanization, second-home ownership, amenity migration—within migration research, but these rarely captured the full complexity of this phenomenon, delimited around concerns such as aging, and privileging place to the exclusion of subjectivities (for an overview of this discussion see Benson and O'Reilly 2009). The development of the concept of lifestyle migration, primarily identified through rich ethnographic research (see for example Hoey 2005, 2006; Knowles and Harper 2009), sought to “examine both the similarities and differences within this growing trend as well as to begin to draw attention to its location in wider structural and historical forces and its local and global impacts” (Benson and O'Reilly 2009), with lifestyle migration defined “as a spatial mobility of relatively affluent individuals of all ages, moving either part-time or full-time to places that are meaningful because, for various reasons, they offer the potential of a better quality of life” (ibid).

The contributions to this thematic section emerged from discussions taking place at the latest meeting of scholars working on lifestyle migration, a workshop entitled “The Future of Lifestyle Migration Research”, that took place October 2014 at Goldsmiths, University of London. This event provided opportunities to reflect on the state of the art in this field of research, for people to share and discuss new empirical data, develop new research synergies between different scholars from around the globe, but also to consider the possible lacunae in this field of research and how it might develop as a field in the future. The discussions were attentive not only to the migrants themselves, but broadened to consider the wider structural contexts that facilitate migration and, in turn, the impact of such migration on both migrant lives and the destination. Crucially, the discussions highlighted the social and political circumstances of lifestyle migration for people and places. This is a theme that is particularly prominent in the papers in this section. Discussions also highlighted how the intersections of culture

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and migration that lifestyle migration inherently observes offer a specific contribution to wider studies of migration.

The six contributions to this thematic section build on these discussions, reflecting on new directions—theoretically, conceptually, and methodologically—in which the field might progress, but also considering bringing other fields of research, particularly their approaches to understanding social transformation, into discussions about lifestyle migration, how this structured within particular contexts, but also how in-migration of the relatively affluent might impact on destinations and populations. In this way, they raise important questions about the future of the field and its intersections with and value for other areas of research.

As the guest editors of this thematic section, we would like to thank everyone involved in the process: the authors of the articles, reviewers and editors, as well as the coordinators of the *Lifestyle Migration Hub*, of which most authors are members and from which the initial idea for the event in London came.

# LIFESTYLE MIGRATION: FROM THE STATE OF THE ART TO THE FUTURE OF THE FIELD

Michaela BENSON<sup>1</sup>

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## ABSTRACT

### **Lifestyle Migration: From the State of the Art to the Future of the Field**

This introductory article provides an overview of the predominant themes that have been explored within the field of lifestyle migration research. In this way, it seeks to locate the contributions to this special section within a wider field, showcasing their innovation. It highlights longstanding interests in migrant subjectivities, cultural narratives of place and migration, alongside a consistent focus on understanding the structural conditions that promote and facilitate lifestyle migration. This overview introduces the field of research to a non-specialist audience and organizes existing theoretical and conceptual concerns within the field.

**KEY WORDS:** lifestyle migration, migrant subjectivities, cultural imaginaries, migration and social transformation

## IZVLEČEK

### **Življenjsko-stilske migracije: od trenutnega stanja k prihodnosti področja raziskovanja**

Uvodni članek prinaša pregled najpomembnejših tem, s katerimi se ukvarjajo raziskave življenjsko-stilskih migracij, in tako prispevke v pričujoči posebni številki umešča v širše področje in dokazuje njihovo inovativnost. Osvetljuje tudi dolgotrajno zanimanje za migrantske subjektivitete, kulturne naracije kraja in migracije, in to skupaj s konsistentnim fokusom na razumevanje strukturnih pogojev, ki promovirajo in olajšujejo življenjsko-stilsko migracijo. Pregled omenjene raziskave predstavlja nestrokovnemu bralstvu in organizira teoretska in konceptualna vprašanja, ki se ob tem pojavljajo.

**KLJUČNE BESEDE:** življenjsko-stilske migracije, migrantske subjektivitete, kulturni imaginariji, migracije in družbena transformacija

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## INTRODUCTION

The definition of lifestyle migration *as a social phenomenon* is intended to capture the movement and (re)settlement of relatively affluent and privileged populations in search of a better way of life. Rather than a focus on production and the involuntary nature of many migrations, lifestyle migration appears to be driven by consumption and is optional and voluntary, privileging cultural imaginings of destinations and mobilities. (Benson and Osbaldiston 2014: 2-3; emphasis added)

To date, the central focus of the field of research into lifestyle migration has been in working through conceptual and theoretical framings, identifying lifestyle migration as a distinct social phenomenon made possible by particular structural and material conditions (Benson and O'Reilly 2009; O'Reilly and Benson 2009; Benson and Osbaldiston 2014). While this is undoubtedly an exercise that has helped to establish and develop the field, this introductory article argues that there is an urgent need to consider how lifestyle migration research might intersect with other areas of social science research. This is both necessary as an exercise in extending the relevance of the field, and developing the analytical purchase of the research conducted in this area. The articles in this special issue play an important role in opening up these conversations.

The articles all hold in common reflections on the cultural significance of place within lifestyle migration, innovating in relation to this well-established theme within lifestyle migration research in one of two ways: (1) their consideration of destinations that have not so readily been the focus of lifestyle migration research—urban (Zaban, this issue), rural locations in Northern Europe (Eimermann, this issue)—or (2) locating the cultural significance of these landscapes within the *longue durée* (Osbaldiston, this issue; Rogelja, this issue; Weidinger and Kordel, this issue). The cultural significance of place additionally serves as an anchor from which each contribution explores the intersections of lifestyle migration research alongside other social science concerns. Across several of the contributions, the relationship between lifestyle migration and social and economic restructuring within destinations is particularly prominent (Weidinger and Kordel, this issue; Eimermann, this issue; Zaban, this issue). Creating a firmer dialogue between lifestyle migration research and cultural sociology is the ambition of Osbaldiston's (this issue) contribution, while Rogelja (this issue) presents a methodological intervention that argues for biographical narrative methods in the study of lifestyle migration. These contributions represent the state of the art in lifestyle migration research, each uniquely challenging predominant themes and conceptualizations that have characterized the study in this area. Read together they lay down the gauntlet for future understandings of this social phenomenon.

In the article below, I provide a brief overview of recent theoretical and conceptual framings of lifestyle migration research. This is by no means comprehensive, but intends to highlight the key directions that research in this area has taken. In particular, it highlights longstanding interests in migrant subjectivities, cultural narratives of place and migration, alongside a consistent focus on understanding the structural conditions that promote and facilitate lifestyle migration. It is set up in this way to showcase the contributions of the articles in this special issue, laying the groundwork for their innovations. However, it also, at times, gives a sense of the possible lacunae in this field of research—the need for a more sustained focus on the impacts of these migration flows, for the recognition of its location within wider global processes of social and economic transformation—and its need to develop better intersections with other areas of research, namely, the broader literatures on migration and social transformation.

## UNDERSTANDING LIFESTYLE MIGRANTS

Lifestyle migrants are relatively affluent individuals of all ages, moving either part-time or full-time to places that, for various reasons, signify, for the migrant, a better quality of life. Ethnographic accounts especially have revealed a narrative of escape permeating migrants' accounts of the decision to migrate, further emphasised by their negative presentations of life before migration ... Lifestyle migration is thus a search, a project, rather than an act, and it encompasses diverse destinations, desires and dreams (Benson and O'Reilly 2009: 609–10)

The theoretical and conceptual framings of lifestyle migration research, such as that presented in the quotation above, have, for the large part, been derived through the analysis of ethnographic research. Often bound around the migrant experience, scholarship derived from these methodological framings has largely focussed on providing description and explanation of (lifestyle) migrant subjectivities (see for example O'Reilly 2000; Hoey 2005, 2006, 2014; Oliver 2008; Oliver and O'Reilly 2010; Benson 2011, 2013b; Korpela 2009, 2010; Osbaldiston 2012). In this respect, publications in this area of the field have been focussed on how the decision to migrate and the location selected reframes lives, with lives led within destinations often defined in contrast to the lives left behind. The lifestyles sought gain their significance through this opposition but are also intrinsic to the ways that social identities are (continually) remade following migration. Central to understanding these migrant subjectivities are the relationships between consumption and identity, privilege and precarity as I outline below.

### Consumption and identity

The link between consumption and migration that lies at the core of conceptualisations of lifestyle migration (see for example Benson and O'Reilly 2009; Knowles and Harper 2009), leads to its common misrecognition as a form of tourism; in an era when most migration is presented as a form of production, phenomena which seem to be best characterised as consumption—with destinations (and imaginings thereof) consumed through the act of migration and everyday lives—do not fit the mould. This dualism between tourism and migration, consumption and production breaks down however, if it is acknowledged that migration often contains some elements of consumption and tourism, production (Bell and Ward 2000; Williams and Hall 2000, 2002).

In the case of lifestyle migrants, *the decision to migrate is predominantly presented and understood as a lifestyle choice* but one that is part of an ongoing lifestyle trajectory stretching from before migration and into settlement (Knowles and Harper 2009; Benson and O'Reilly 2009; Benson 2011). It thus reflects the sense of migrant subjectivities as '*in process*, neither fixed nor straightforwardly transformed through migration' (Benson and Osbaldiston 2014: 17; original italics; see also Halfacree and Boyle 1993). However, this image of linear progression is complicated somewhat by Rogelja's contribution to this issue. Her longitudinal ethnographic study of 'liveaboards', families living on board boats that traverse and moor in the Mediterranean, renders visible the possible turbulence of this process. Different sites and living conditions are devalued and reevaluated for what they can offer over the life course. At times, living aboard is not sustainable; while it once offered the promise of a better way of life, this imagining is ruptured in response to particular family circumstances. Indeed, what she reveals is how, while living aboard might once have represented lifestyle, people find themselves in a position where they might fall in and out of being a lifestyle migrant. Lifestyle migration thus denotes an ongoing process, in which consumption, migration and identity are thoroughly intertwined and in which nothing is fixed and which can also be disturbed or interrupted as personal circumstances and places change.

The relationship between consumption and identity within lifestyle migration has at times been interpreted as the quintessential project of the self (Hoey 2005, 2006) or exemplar of the individualism of late modernity:

Lifestyle migration is often described as an individual's search for a better way of life abroad and lifestyle migrants often present themselves as active agents who have improved their lives by way of their own unmediated choice; they have taken their destiny into their own hands by escaping unsatisfactory circumstances and do not expect others (or societies) to act on their behalf. (Korpela 2014: 27)

Indeed, on the surface, and as the quotation above evokes, such understandings of lifestyle migration appear to resonate with theories of individualisation. However, as in other migration flows these choices and lives sought/led take place and are made possible by structural contexts—social, economic, political—operating at different scales—local, national, global, transnational (O'Reilly 2012). Getting below the surface of migrant accounts makes these structures visible, demonstrating the constraints on the migrants' agency. This recognition of the intersections of structure and agency is central to making sense of lifestyle migration (Benson and Osbaldiston 2014); among others, it helps to explain how different locations become destinations for lifestyle migration, the decision to migrate to particular locations, at specific points in time, the experience of life within the destination, the position taken by migrants in the local community but also their reception into and impact on this community and the destination more broadly.

While the recognition of consumption within migration has been one of the unique contributions of lifestyle migration research to the broader field of migration studies, it is important not to overlook the possibility that consumption narratives might co-exist with or be made possible by production. This is most clear in Eimermann's contribution to this issue in his argument that the lifestyles sought are not only consumed but also produced by lifestyle migrants. He demonstrates how this needs to be understood within the context of wider patterns of rural development; in the lagging Swedish countryside, one solution has been to attract incomers to the area to diversify both the population but also the potential production of the Swedish countryside. Such incomers he presents as lifestyle migrants, and yet to live in the Swedish countryside requires that they have an income. Many turn towards rural tourism activities as a way of making a living, a considerable break from the lives and careers led before migration. In other words, in order to live in the Swedish countryside in the way that they imagine, they have to engage in production. Lifestyle might lie at the root of their decision to migrate, but they then have to find ways to maintain it within their everyday lives, with the result that their migrations also resemble forms of labour migration. It is also clear that they are crucial actors in the move towards the post-productivist countryside, aiding in the diversification of otherwise struggling rural economies. This case further complicates the presentation of lifestyle within migration, demonstrating that it is important to understand how this might intersect with other considerations within the migration decision.

## For migration

The presentation of lifestyle alongside migration is a significant and important innovation within migration research; there are several reasons why lifestyle is paired with migration—as opposed to tourism or, as I relate below, mobilities. The first of these derives precisely from the way that research subjects often articulate their actions, adamantly stating the fact that they were not tourists and actively demonstrating the ways in which they differ from the, albeit idealised, image of the tourist (Waldren 1996; O'Reilly 2003). The second of these is the political point intended by the use of migration here; it serves a between as and way of naming privilege, which often goes unremarked and is depoliticised (Knowles 2006), and serves as a reminder of the breadth of contemporary global migrations and indeed, the inequalities that mark these flows. As Skeggs (2004) highlights, the pursuit of lifestyle is only available to the privileged. This is privilege, as I explain in more detail in the following section, understood both as the choice of how to live but also the migrants' ability to cross borders with ease, their privilege thus ren-

dered both through relative affluence (vis-à-vis that of those within the destination) and their citizenship of powerful nation-states (Benson and O'Reilly 2009; Croucher 2009, 2012; Benson 2013a).

Such privilege similarly lies at the core of the phenomena described as 'lifestyle mobilities', '... on-going semi-permanent moves of varying duration ... a lens into more complex forms of corporeal mobility and may involve multiple 'home', 'belongings' and sustained mobility throughout the life course' (Cohen, Duncan and Thulemark 2015: 159; see also Duncan, Cohen and Thulemark 2014). These authors innovate by demonstrating how for some privileged subjects, belonging and home are not tied to notions of residence and return, as they are in much of the migration literature, but are instead intrinsic to the meaning and significance of mobility in their lives. The choice to pursue mobility as a way of life destabilises the singularity that otherwise characterises concepts of home and belonging. Within the broader mobilities paradigm—which also recognises challenges to mobilities, and consequent immobilities (see for example Sheller 2011; Salazar and Smart 2011)—this approach privileges understanding the significance of mobility for identity-making.

In many ways, lifestyle mobilities is a complementary approach to lifestyle migration, as Cohen, Duncan and Thulemark (2015) acknowledge. The agenda focuses on understanding the intersections of lifestyle, mobilities and identity, an ambition not dissimilar to that of lifestyle migration. However, the inclusion of mobility within this framework does a lot of work in distinguishing the concept of lifestyle mobilities. Similarly, migration is not an empty signifier in the concept of lifestyle migration, although it is clear that the work this does should be better elaborated. Rather than a descriptive term that recounts the physical movement across borders, the use of migration carries a political point, bringing to attention migrant populations that are often treated as a case apart or are invisible in wider discourses about migration. Rather than an exercise in categorisation, which would aim to determine who is and who isn't a lifestyle migrant such conceptualisations aim to provide an explanatory framework, a tool to be used, but also developed and manipulated in future understandings of migrant subjectivities (Benson and O'Reilly 2009; Benson and Osbaldiston 2014).

### Privilege (and precarity) in lifestyle migration

As I stated previously, another significant characteristic of lifestyle migrants is the recognition of the privilege that often underpins their migration (see also Benson 2013, 2014). To be clear, this recognition of privilege derives from documented research revealing cases of lifestyle migration and should not preclude the possibility of lifestyle as a component of migration being possible even in the perceived absence of privilege. The privilege presented here is relational, rather than absolute; it should always be understood as *relative privilege*. What this means is that migrants may indeed not be from a position of outright privilege in their country of origin; their privilege derives from the various structural conditions—notably global inequality and the geometries of power between sending and receiving contexts—that facilitate their movement in pursuit of particular lifestyles, that structure their position in social hierarchies within the destination (Croucher 2012; Benson 2013a; Hayes 2014a & b; see also Amit 2007) and through which, as Hayes reminds us, 'existing inequalities of caste and class' (2014b: 2) may be reproduced. It becomes clear that while relative privilege may facilitate migration, is between it and also a significant characteristic of these migrants' lives.

It is also clear that such privilege may coexist with precarity in these migrants' lives. In one respect, such precarity may relate to the lives led within the country of origin. As Hayes' (2015) account of North American migration to Ecuador outlines, this precarity may be read through the economic motivations—what he refers to elsewhere as geoarbitrage, the strategic deployment of accumulated capitals, assets and resources to facilitate lifestyles in countries with lower daily expenses (Hayes 2014a)—particularly the drive to escape financial insecurity in their place of origin. In this way, he stresses the conditions of social and economic transformation in North America and how this has impacted on

those currently entering retirement. As their ambitions for retirement can no longer be met in their country of origin, retirement abroad becomes for some a response to these shifting circumstances. Economic forces thus play a significant role in structuring lifestyle migration.

Precarity may also be evident in the daily lives of these migrant populations and is highly context-specific. While the research on intra-European migration that has predominated lifestyle migration research rests on, *inter alia*, reciprocal welfare arrangements and freedom of movement, these conditions are not replicated in other locations. Indeed, even within the European Union these can be quite difficult to navigate, as has been documented time and again in lifestyle migration research (see for example O'Reilly 2007; Benson 2011; see also Ackers and Dwyer 2004). O'Reilly (2000) and Oliver's (2008) early work on the British in Spain, demonstrates this clearly as they reveal how precarity coincides with ageing, ailing bodies causing migrants to reevaluate their residence abroad and the lives they can lead. As the migrants experience healthcare provision, the distance from friends and family, and often economic difficulties, they find themselves in a doubly vulnerable and precarious position (see also Hall and Hardill forthcoming).

Beyond Europe, the structural conditions relating to border-crossing and residence, both as determined by the country of origin and the destination, bring as a replacement for the deleted as privilege and precarity are brought coevally into view. Botterill (forthcoming) highlights these intersections in the case of the British residents of Thailand. She highlights the multiple contexts in which precarity may be felt: finance, health and rights. Pension freezes and exchange rate changes bring about financial insecurity; a lack of affordable basic healthcare results in these migrants taking individual responsibility for their ageing bodies; and despite their elevated status—the result of particular postcolonial histories—these migrants have few rights within Thailand. This case clearly illustrates the need to be attentive the multiple modalities of precarity within lifestyle migration, but also how these intersect with privilege.

As these examples demonstrate, the recognition of privilege and/or precarity among such populations is revealing of the intersections of structure and agency within the decision to migrate, but also in the migrant experience. It also demonstrates the quality of privilege not just as an outward measure of wealth or affluence, but as a relational concept that captures its symbolic construction of privilege.

## RE-EXAMINING CULTURAL NARRATIVES

The focus on lifestyle migrants has resulted in the development of theoretical and conceptual tools that explain the construction of migrant subjectivities in migration and settlement. However, as I demonstrate below, this cannot be viewed in isolation. A longstanding feature of this field of research has been the interest in cultural narratives or imaginings about particular locations and to a lesser degree, migration. These feature strongly in the decision to migrate, but also expectations of how to live following migration, inherently connected to how place and migration are understood and enacted. This focus of lifestyle migration research on the cultural significance of destinations and migration is unique within migration research more generally. Amenity migration, a correlate field of research, similarly highlights how perceptions of particular landscapes (mountains) and their populations interplay with migration: 'it is the migration to places that people perceive as having greater environmental quality and differentiated culture ...' (Moss 2006: 3; see also Gosnell and Abrams (2009) for a review of this body of literature). Yet, where these accounts differ is in the fact that their subject is often the destination—its advantages vis-à-vis life in other locales, the planned development of these, the impact on the local community and environment, the relationship between migration and rural restructuring—leading to the neglect of the wider significance of migration for social identities. In contrast, in the field of lifestyle migration the subject of research has often been the migrant population, their lives, migration stories and identities. This has led to questions about the cultural significance of destinations, but from the point of view of questioning what they mean to the migrants, what they do for them, and how they interplay with migrant identities.



## The workings of cultural imaginings

Cultural narratives both of place and migration operate powerfully within accounts of the decision to migrate, presenting an explanation of migration that makes sense to a wider audience. The cultural construction of particular places as offering 'the good life' makes evident that this is not an intrinsic quality of certain landscapes. In our early accounts of lifestyle migration, Karen O'Reilly and I identified three representations of place that commonly featured in accounts of destinations: the rural idyll, the coastal retreat, and cultural or spiritual attractions (Benson and O'Reilly 2009; O'Reilly and Benson 2009). These are imaginaries, underpinned by collective imaginings.

As I have argued elsewhere (Benson 2012), these representations, emplaced onto diverse landscapes, are the product of particular cultural frameworks. Some locations become represented through tropes that might seem at odds with the physical and built environment; a prime example of this is Griffiths and Maile's (2014) research on Britons in Berlin. Prominent within their respondents' account was once again, '[T]he rural/urban dichotomy in the lifestyle migration literature with its theme of 'escape from the city' ... reproduced but in this case in the context of Berlin ... Berlin's empty spaces and dirt appeared to represent a slower, almost 'rural' way of life' (Griffiths and Maile 2014: 154). The mapping of this 'rural' imagining onto a European city, provides further strength to our understandings of cultural narratives of place and how they operate within lifestyle migration discourses. It illustrates that rather than being valued for their particular amenities, places become valued because of what they are perceived as offering to the migrants, and how the migrants envisage remaking their lives and identities within these imagined landscapes.

Central to these representations is their presentation as authentic and the possibilities that they allow for self-realization. This is most clearly articulated in Osbaldiston's works, where he spells out clearly the dichotomous relationship between the coast and the city and its role in promoting migration to the coast (2010), highlighting how the 'authenticity' of place is curated, preserved and promoted within the place-marketing of particular destinations (2011). Beyond this, however, he is also clear on how these cultural imaginings and valorisations of place intersect with subjective understandings of the self, allowing for the possibility of the transformation of self through and in particular locations (Osbaldiston 2012). This is made possible in part by the fact that these representations have long histories as cultural narratives (see for example Osbaldiston 2010, 2011, 2012).

To understand the work of these cultural narratives, we can turn towards theories concerning the social imaginary. The social imaginary has its structural origins in how we understand the world around us and our particular place within it (see Gaonkar 2002 for an overview of this literature), and thus reflects particular cultural and historical contexts (Castoriadis 1987; Taylor 2004). Through the social imaginary society and its moral order is reproduced, shaping the behaviours and actions of individuals (Castoriadis 1987; Taylor 2002, 2004). It is also clear however, that imagination has the capacity to do more than just reproduce social structure; as Appadurai (2002) argues, it inspires action, bringing with it the possibility of transforming the social structure of society (not only recreating it). In this rendering, imaginings become one site for the recognition of structure within lifestyle migration, both reproducing and innovating pre-existing structural conditions (Benson 2012); as action undertaken on the basis of imagination, lifestyle migration thus has the capacity both to reproduce and refract social structure, while also, because of the wider valuation of such imaginaries (and indeed, their *longue durée* as imaginings), legitimating the actions of the individual.

## The *longue durée* of cultural imaginings

While representations invariably engage well-known themes of urban escape and rural retreat, rarely do we ask where these imaginings come from, let alone locate them within wider historical and

philosophical narratives (Osaldiston 2014). This is one area where the contributions to this special issue innovate. Cultural narratives about the destination feature powerfully within each of the papers, from the Jewish homecoming to Israel (Zaban, this issue)—a nationalist imagining that underpins privileged migration to Jerusalem—to the lagging Swedish countryside, marketed as a rural idyll (Eimermann, this issue). Although they approach this theme quite differently, Osaldiston, Rogelja and Weidinger and Kordel's contributions to this issue highlight the value of thinking about the *longue durée* of cultural imaginings. Rogelja's (this issue) unique focus on the sea as a destination draws on literary and historical accounts to position the contemporary imaginaries of the sea through which 'liveaboards' narrate their decisions about how to live. Weidinger and Kordel (this issue), in their account of retirement to German spa towns, revisit the idea of place as therapeutic and how this might feature in lifestyle migration research (see also Hoey 2009). Osaldiston (this issue), through his account of what a cultural sociology approach might contribute to understandings of lifestyle migration, reminds us that the 'good life' is a cultural text, part of a longstanding trend towards self-authenticity inspired by disenchantment in modern life. The significance of these locations is therefore presented not as unique, but as part of wider cultural trends in the valuation of place.

The exercise in historicism reinvigorates the relationship between place, movement and identity. To demonstrate this, I want to return briefly to the discussion of Osaldiston's contribution. Osaldiston positions lifestyle migration within a wider cultural trend responding to the disenchantment of modern life, as people seek authentic lives and selves (see also Osaldiston 2012; Benson 2011, 2013b). What this presentation makes clear is *the value of moving to particular places in search of (self-)authenticity*, once again making clear that the relationship between migration and identity is also central to understanding lifestyle migration. Other studies demonstrate clearly how lifestyle migration offers a blank slate through which to renegotiate identities (Oliver and O'Reilly 2010), focused on, for example, positive ageing (Oliver 2008). In such accounts, the relationship between migration, place and identity is paramount: *migration to a particular place offers the possibility of remaking the self*. Understanding this relationship between migration, place and identity within lifestyle is another way of intervening in wider discussions within in migration studies, where home, belonging and social identities have been recurrent and powerful themes.

This exercise in historicism may also lay the foundations for a considered account of how to analyse lifestyle migration, and the tools that we can put to work to do this. Recognising the *longue durée* of the cultural narratives so readily adopted by lifestyle migrants adds another dimension to our analyses. Indeed, understood in one light, the recognition of the history of these narratives links contemporary cases of lifestyle migration to earlier phenomena where, disenchanted with modern life, people seek the sublime (Osaldiston, this issue; see also Osaldiston 2012). Repositioning the cultural narratives behind lifestyle migration might open up the discussion about whether it is a phenomenon distinct to late-/liquid modernity, or whether there are precedents that might throw these interpretations into sharp relief. What this demonstrates clearly is that by recognising the *longue durée* of these imaginings, predominant analytical framings are called into question, opening up the dialogue once again about how to understand and interpret this contemporary phenomenon (see also Benson and Osaldiston 2014).

One of the problems within the foci on imaginings of place and movement can be that it displaces attention from the structures, in particular the privileges, that bring about migration. In other words, the cultural valuation of particular geographies does not in itself explain how migration is brought about. Rather, to understand this fully we need to be attentive to how these are placed within the context of people's lives, experiences, and capabilities, alongside wider historical and material conditions (Benson and O'Reilly 2009) accounting for the processes by which people are able to act on the basis of imagination, to recognize the various contingencies that bring about migration (Benson 2012). Rather than lifestyle migration being a phenomenon specific to late-/liquid modernity, certain historical and material contingencies are in play that mean that through migration, certain populations—those

with the appropriate levels of relative capital (social, economic and cultural)—may attempt to seek ‘the good life’, a narrative which has deep, historical roots. It may then be seen as one current articulation of a longer-standing cultural narrative.

## **LIFESTYLE MIGRATION, SOCIAL AND ECONOMIC RESTRUCTURING**

Relative economic privilege and ease of movement are undoubtedly part of the wider structural context that makes lifestyle migration possible (Benson and O’Reilly 2009: 618; see also O’Reilly and Benson 2009; Benson 2012). Featured prominently in the literature on International Retirement Migration (King et al. 2000; Casado-Díaz et al. 2004), the baby boomer is the figurative representation of such economic privilege. There is a danger, however, that this figuration does not fully convey the changing social and economic conditions following the post-war reconstruction of many Western and European nation-states that led to the increased affluence of the baby boomer generation, in particular their peak levels of expendable wealth and the significant assets accumulated through property ownership. Undoubtedly, these contexts form part of the backdrop to how trends such as lifestyle migration have become possible. However, what I want to highlight here is that recognizing the wider context is the first step in demonstrating how lifestyle migration might be linked to social and economic restructuring. While the example of the baby boomers emphasizes a long-term social and economic restructuring in the place of origin and how this plays a role within lifestyle migration, more immediate experiences of restructuring might shape the decision to migrate, so too social and economic transformation taking place within the destination. Finally, the scale of these transformations—whether these are local, national, global—is important to bear in mind.

### **Migration as a response to economic and social transformation**

Migration as a response to restructuring—what I present above as immediate experiences of restructuring—is not uncommon. Indeed, this is often articulated in migrants’ own accounts of their migration as they present the wider context in which they chose to leave their country of origin. Among some of my interlocutors in rural France, changing social, economic and political contexts in Britain in the late 1980s and early 1990s had provided the conditions for their migration, in particular their experiences of being made redundant from public sector jobs. Expressed as watershed moments or turning points (Benson 2011; see also Hoey 2005, 2006), these experiences are foundational to the presentation of their migrations as transformative; in this way, they become integrated into the identity-making projects of which these migration stories are a fundamental part.

However, what I want to draw attention to here is how migration, even when presented in these personalized narratives, is a response to wider structural transformation (Benson 2010; Benson and O’Reilly 2009). It is perhaps more tangible when expressed, as in the case of Hayes’ (2014, 2015) participants, in outright economic terms—the erosion in the value of pensions, stagnation of housing assets—and the impact of these on financial security. These, as Hayes (2015) explicitly states, are the consequences of widespread social and economic transformation. But there is a need to be attentive to other hidden clues that might reveal wider structural changes in the place of origin and how these might interplay with migration. Indeed, it is precisely the retreat to lifestyle and consumption that can, at times, mask the role of such structural change (and individual responses to and experience of) within migration; as individuals present their decision to migrate as innovative, brave, adventurous and pioneering, structure is neglected.

## Destinations as a product of social and economic restructuring

Social and economic restructuring might also account for how and when new destinations are promoted and established to receive lifestyle migrant populations. Place marketing and the construction and maintenance of place myths (Shields 1991), particularly as these are targeted towards international property investment, are an important part of the landscape through which destinations are made into attractive to potential lifestyle migrants. Promotional materials reproduce representations of place that emphasize authenticity (Osbaldiston 2012) and its therapeutic qualities (Hoey 2009; see also Weidinger and Kordel, this issue), all representations that imply the 'better way of life' can be led there. This has been noted time and again in the case of lifestyle migration research in Latin America, first in Panama and Belize (McWatters 2009; Jackiewicz and Crane 2010) and most recently in Ecuador (Hayes 2015). In Panama, the case with which I am most familiar from my own work, the promotion of certain locations coincided with significant neoliberal land reform in Panama (Horton 2006; Velasquez Runk 2012) and the perceived need for rural development. The recognition of the role played by this place-marketing helps to explain the decision to migrate to a particular destination, but leaves lots of other questions unanswered. In this case, what are the conditions under which any destination might suddenly ascend into the international property investment market? This question challenges us to rethink destinations in terms of social and economic restructuring; in other words, *how are destinations made through structural transformation?*

This question lies at the core of both Weidinger and Kordel's contribution on German Spa towns as a lifestyle migration destination and Eimermann's paper on Dutch migration to the Swedish countryside. In both cases, there is a resonance with the wider shift to understanding rural landscapes through a post-productivist lens and policy change aimed at planning for rural development beyond agriculture. As both papers demonstrate, encouraging the in-migration of these more affluent populations is an element of strategies aimed at diversifying rural economies. Establishing a firmer link between lifestyle migration research, and amenity migration which has examined rural transformation in considerable detail (Gosnell and Abrams 2009) might furnish the literature on lifestyle migration with conceptual models that are more attuned to capturing these structural changes that create particular destinations for property investment and lifestyle migration (see for example Zoomers 2010; Barrantes-Reynolds 2011).

In particular, as Weidinger and Kordel (this issue) make particularly clear, the turn towards this literature might also facilitate the integration of migrants' and locals perspectives on lifestyle migration, displacing the focus on individual migrants that is a regular feature of this research. As they demonstrate, although markets have been established to encourage further tourism interest in the area—with correlate services—the unplanned in-migration of retirees seeking permanent dwellings has brought demographic change which local services are not equipped for, and has also had an impact on the availability of permanent dwellings within the area. This demonstrates that although tourism and indeed some migration may be sought as a way of diversifying and sustaining local and regional economies, this may also come with unanticipated consequences, in this case the lack of family homes.

Zaban's contribution gives a somewhat different entry point into the consideration of the relationship between lifestyle migration and structural transformation. Her account of how incoming English- and French-speaking Jewish populations have brought about gentrification in Jerusalem shows a perhaps unusual state intervention that has deep nationalist motivations. The state encourages and facilitates the migration of high-status immigrants to the country, demonstrating a state intervention focused on immigration that shares some of the traits of contemporary state-led gentrification elsewhere—particularly in the encouragement of 'foreign' property investment—but which, in the context of wider spatial politics in the area, has quite significant political consequences. This contribution is thus unique within this collection of articles, as it focuses on the complex intersections of migration policies and ongoing gentrification in a particularly fraught political and territorial context. In relation

to the literature on lifestyle migration, it also demonstrates how homecoming, spiritual and religious life might be part of the 'better way of life' sought by these high-status Jewish migrants.

As I have outlined above, the articles in this issue go some way towards addressing the relationship between such privileged migration and wider structural issues; indeed, this is most clear in Zaban's contribution, with its focus on 'the spatial politics of privileged migration and its impact on cities, neighbourhoods and housing markets ... This case-study is also special in the sense that this is an ethnic (as well as ideological and religious) migration which is interconnected with class habits'. This contribution carefully addresses the different scales in which lifestyle migration is caught up and the consequences of this; she artfully draws on other bodies of literature that might shed light on her particular case, illustrating the value and importance of considering how these issues have been addressed elsewhere. I argue here that in establishing these points of dialogue, lifestyle migration research might be coaxed out of its silo but, beyond this, it might demonstrate the wider value of research in this area for understanding projects of urban (and rural) development, as this is evidently a part of this wider landscape. What these brief examples make clear is that the destinations that lifestyle migrants seek are often framed and shaped by wider structural transformations. An approach focused on the impacts of lifestyle migration on destinations suggests a rather one-directional frame for understanding. I argue instead that there is a need to consider both how lifestyle migration is structured through social and economic transformation at different spatial and temporal scales and locations, while also recognizing that lifestyle migration might be part of the way that different locales are restructured. This approach recognizes that lifestyle migration might be part of quite complicated contexts, part of the landscape undergoing structural transformation that might be quite easily overlooked if simply reduced to their impacts on places and populations.

## CONCLUSION

The aim of this brief introduction has been to demonstrate both how the contributions to this volume move the discussion about lifestyle migration forward, but also to highlight points of dialogue with other literatures and fields of research. In (re)presenting the conceptual and theoretical framing of lifestyle migration, it has sought to demonstrate that while this is a trend that is underpinned by consumption and identity, the labelling of this phenomenon as migration is both a deliberate and political point that positions it within migration as a whole. In other words, it is important that these relatively privileged subjects are recognized as migrants rather than rendered invisible in discussions about migration. Beyond this however, through the re-examination of the cultural narratives underpinning these migrations, the contributions to this collection throw into sharp relief the need to reconsider the theoretical framing of lifestyle migration as a product of late-/liquid modernity, by demonstrating the deep historical precedents of the quest for a better way of life. Similarly, the consideration of the relationships between lifestyle migration and wider social and economic transformations demonstrates the need to consider how lifestyle migration contributes to and is framed by wider social and economic transformations on a range of geographical and temporal scales.

The conceptualization of these population movements as lifestyle migration has really taken root within a relatively short period of time; it is undoubtedly a framework that scholars find valuable in terms of making sense of the populations that they study. However, the broader ambitions of these conceptualizations for dialogue need to be made more explicit, particularly in relation to migration studies and research on urban and rural development.

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## POVZETEK

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### ŽIVLJENJSKO-STILSKE MIGRACIJE: OD TRENUTNEGA STANJA K PRIHODNOSTI PODROČJA RAZISKOVANJA

Michaela BENSON

Uvodni članek prinaša pregled najpomembnejših tem, s katerimi se ukvarjajo raziskave življenjsko-stilskih migracij in s tem prispevke v pričujočem tematskem sklopu umešča v širši kontekst in poudarja njihovo inovativnost. S poudarkom na razumevanju strukturnih pogojev, ki promovirajo in lajšajo življenjsko-stilsko migracijo, osvetljuje tudi dolgoletno zanimanje za subjektivitete migrantov, kulturne naracije kraja in migracije. Pregled tovrstnih raziskav namenja laičnim bralcem in organizira teoretska in konceptualna vprašanja. Osrednji cilj članka je promovirati potrebo po strokovnem preučevanju prekrivanja raziskovanja življenjsko-stilskih migracij z raziskovanjem drugih družbenih ved. Raziskave so nujne tako za širjenje relevantnosti polja kot tudi za razvoj analitičnega dometa raziskav. Članki v tem sklopu osvetljujejo dve področji (migracijske študije in razvoj podeželja) in prikazujejo, kako lahko upoštevanje njunih prekrivanj pripomore k razvoju področja, hkrati pa prispeva k prenovi razumevanja omenjenih širših področij.

V povezavi s študijami migracij članek v ospredje postavlja potrebo po razumevanju subjektivitete migrantov, prepoznavanju kompleksnih ciklov potrošnje in proizvodnje, v katerih se znajdejo migranti in s pomočjo katerih se (re)konstruirajo njihove identitete. Članek prispeva tudi k prepoznavanju migrantov kot privilegiranih subjektov in širitvi pokrajine migracij, s čimer izziva nekatere od dominantnih okvirov migracij. Razprava o razvoju podeželja osvetljuje potrebo po upoštevanju različnih načinov prestrukturiranja družbene in ekonomske transformacije na različnih prostorskih in časovnih lestvicah in lokacijah, pri čemer hkrati upošteva, da je življenjsko-stilska migracija lahko del načina prestrukturiranja različnih krajev. Potreba po raziskovanju življenjsko-stilskih migracij se pokaže prav pri ustvarjanju teh točk dialoga.



# A CULTURAL SOCIOLOGICAL READING OF LIFESTYLE MIGRATION

Nick OSBALDISTON<sup>1</sup>

COBISS 1.01

## ABSTRACT

### **A Cultural Sociological Reading of Lifestyle Migration**

One of the fundamental issues in lifestyle migration is that the ideals behind it, a quest for a better way of life, are not homogenous across groups and contexts. Unlike other conceptual frameworks within migration, lifestyle migration is embedded in a cultural framing where participants draw from a variety of cultural structures to make sense of their experiences. In this paper, I examine narratives from participants in lifestyle migration in Australia. Buried in these narratives are three broad themes: anti-consumerism, nostalgia and boundary maintenance. Using a cultural sociological lens, I propose that this demonstrates the flexibility of the concept of lifestyle migration but also reflects the usefulness of cultural sociology in unpacking this phenomenon further. **KEY WORDS:** cultural sociology, lifestyle migration, time, nostalgia, cultural boundaries

## IZVLEČEK

### **Sociološkokulturni pogled na življenjsko-stilske migracije**

Temeljna premisa življenjsko-stilskih migracij je, da ideali, ki jih motivirajo, torej iskanje boljšega življenja, niso homogeni za vse skupine in kontekste. V nasprotju z drugimi raziskovanji migracij, so življenjsko-stilske migracije proučevane skozi kontekst kulture; udeleženci izhajajo pri osmišljanju svoje izkušnje iz različnih kulturnih struktur. Članek proučuje pripovedi udeležencev življenjsko-stilske migracije v Avstraliji. Pripovedi zajemajo tri širše teme: kritiko potrošništva, nostalgijo in vzdrževanje meja. Gledano skozi sociološko lečo to izkazuje fleksibilnost koncepta življenjsko-stilskih migracij in uporabnost sociologije kulture pri nadaljnji razlagi tega pojava.

**KLJUČNE BESEDE:** sociologija kulture, življenjsko-stilske migracije, čas, nostalgija, kulturne meje

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## INTRODUCTION

One of the major difficulties in conceptualising a term such as lifestyle migration lies in the problem of interpreting lifestyle as a generic quest for a better way of life. While ethnographic and qualitative accounts provide us with rich narratives from participants about their migration stories, their unpacking requires deeper theoretical knowledge about how lifestyles are consumed in modernity. The first illustrations of this emerge from both Karen O'Reilly (2000; Oliver, O'Reilly 2010) and Michaela Benson's (2011) work that tracks the pre and post migration experience through class lines using Bourdieusian analysis. Others have traced the development of the lifestyle migrant identity to structural shifts that privilege agency and the postmodern need to develop one's path to happiness in everyday life (Korpela 2013). However, in this paper I seek to explore lifestyle migration further by examining the meanings provided by migrants about their experiences from a cultural sociological viewpoint. In doing so, I do not seek to enter into debates about which style of theoretically unpacking lifestyle migration is best. Rather, this approach invites us to consider a raft of cultural repertoires that people draw upon to make sense of their story in both pre and post migration settings.

O'Reilly and Benson (2009: 2, *italics added*) indicate clearly that the term lifestyle migration itself is certainly open for debate and not a closed system inviting only one form of theoretical reflection. They write that lifestyle migration is

[a] *conceptual framework*, through which to examine both the similarities and differences within this growing trend as well as to begin to draw attention to its location in wider structural and historical forces and its local and global impacts...which remains *open to amendment* in the light of new empirical data, lifestyle migration is the spatial mobility of relatively affluent individuals of all ages, moving either part-time or full-time to places that are meaningful because, for various reasons, they offer the potential of a better quality of life. (O'Reilly, Benson 2009: 2)

In some ways, this approach appears similar to another concept, amenity migration, which has been part of literature since Edward Ullman (1954) coined the phrase in order to empirically identify migration for climate reasons. It is certainly possible to read amenity and lifestyle migration as comparable concepts. However, by using a cultural sociological approach we can begin to tease out some of the fundamental differences between amenity migration and lifestyle migration. Using empirical data and exploring this further using cultural sociology, I propose later in this paper that lifestyle migration might be best read as a tool that cannot necessarily be pinned down empirically but which is instead a sensitising concept that holds heuristic value. Underpinning the concept is an understanding that cultural life is messy, complex and particularly difficult to quantify. The value of lifestyle migration as a conceptual type is the ability it has to incorporate and relate to other concepts, such as class and race, while admitting internal differences according to contexts such as place, culture and identity. In other words, lifestyle migration is a flexible framework which allows broad themes to be identified while acknowledging that lifestyle and the ideal of a "better life" is non-homogenous according to different group memberships.

## STRONG CULTURAL SOCIOLOGY: A BRIEF OVERVIEW

Before progressing it is worth discussing the style of cultural sociology that I am proposing to use in this paper. Cultural sociology's recent return to the Durkheimian lens, especially in America, provides an opportunity to revisit the focus of the subdiscipline by turning attention to culture as an independent rather than dependent variable in social phenomena. The framing of social change, for instance, through a lens of cultural power is articulated most profoundly in the "Strong Cultural Sociology" paradigm of

Alexander and Smith (2006). Set out initially as a challenge to 'weak' programmes in the sociology of culture (where culture becomes a dependent variable rather than an autonomous actor), the paradigm attempts to provide a 'textual understanding of social life' (Alexander, Smith 2006: 146). It is worth citing Alexander and Smith (2006: 146) at length here:

The appeal of this theory (narrative and genre theory) lies partially in its affinity for a textual understanding of social life. The emphasis on teleology carries with it some of the interpretive power of the classical hermeneutical model. This impulse to reading culture as a text is complemented, in such narrative work, by an interest in developing formal models that can be applied across different comparative and historical cases. In other words, narrative forms such as the morality play or melodrama, tragedy, and comedy can be understood as "types" that carry with them particular implications for social life.

The proposal to place culture at the forefront of analysis draws the theorist and researcher away from individualism towards broader cultural frames that individuals use to make sense of their lives. Reflective of Geertz's (1973) thick description, culture here is deemed deeply rich with meaning which individuals understand through various cultural structures. Unlike Geertz (1973) however, the strong programme advocates for the connection of local stories to broader social theory. As Alexander (1998: 30) advocates, "the world is meaningful" and as such we need to "describe the world's inner life or we will fail to describe it at all".

By advocating for a cultural focus, the relationship of identity (for instance) cannot be tied simply to factors such as class divisions. This is potentially a pitfall for advocating for a Bourdieusian lens, as Oliver and O'Reilly (2010) and Benson and O'Reilly (2009) attempt to do with lifestyle migration (see also Benson 2011). Rather, what Alexander and Smith (2006) advocate is to examine a host of hermeneutical structures that provide impetus for and perhaps define how people live their lives post-migration. In some ways, lifestyle migration literature is beginning to identify this through race and ethnicity (Benson 2014; Croucher 2009, Hayes 2014). However, at a deeper level, understanding cultural narratives that are developed within groups that people negotiate, for instance national identities, are important to conceptualising the cultural codes that are imprinted on people's motivations for and which remain as watermarks in their lived experiences of lifestyle migration.

Of course, this approach has its limitations. Importantly, there is a potential naivety that is associated with taking culture as an "autonomous agent" that has influence on rather than is influenced by heavy structural elements. Gartman (2007: 383) for instance argues that

[the] problem of Alexander's demand for 'analytical autonomy' is that it assumes what it hopes to demonstrate. By initially bracketing out the influence of economic and utilitarian relation in its formal analysis of culture, it assumes that cultural forms are not themselves affected by these constitutionally, from the inside. The only relation between culture and economy that this method allows is an external, fortuitous intersection of preformed forces.

Culture has been shown not only through Bourdieu (1984) but several others to be "inextricably and internally constituted by the economic organization of society" (Gartman 2007: 383-384). In other words, culture does not exist in a vacuum but is developed by and constituted through class, race and other strong structural boundaries (cf. Lamont 2006).

This criticism could also extend to the way Alexander and Smith (2006) dismiss other useful concepts such as governmentality, charisma and rationality in cultural study. However, in response to this, Smith (2008: 180) has argued that any analysis of this type can at times be "an analytical possibility rather than an empirical reality", suggesting that the strong approach is merely one way of understanding phenomenon and not necessarily the only way. In lifestyle migration there are perhaps "bottomless

layers of meaning" (Smith 2008: 180) requiring several different types of approaches to provide what O'Reilly (2012: 37) describes not as "irresponsible eclecticism" but as a diversity in understanding.

## METHODS AND PROJECT DESIGN

The paper aims to illustrate the effectiveness of a cultural sociological approach in unpacking the different narratives and themes people draw on to make sense of their lives by re-examining data gathered in 2006. The fieldwork reported on here was conducted with an emphasis on exploring risks in shifting to rural places. Reopening this data set, however, presents an opportunity to reflect on the cultural dimensions of lifestyle migration in the Australian setting. The participants in the study were divided into two groups. The first (n=10) were those who had already migrated into their new locations across Australia. The second group (n=5) were a group of individuals who were urban residents who had considered migrating to smaller lifestyle communities.

Participants went through semi-structured interviews, sometimes in person in their homes or over the phone due to geographical distance. Migrants were questioned about motivations for leaving, experiences of their lives in their new communities, about urban lifestyles and risks associated with living in regional/rural societies (most had shifted to these locations). Urban residents conversely were asked about their desires to leave the city (if they had them), what they thought of counter-urban life, what risks they saw living in the city and how they imagined life outside of it. The interviews were recorded, transcribed and then analysed using Strauss' (1999) open coding strategies for interrogating qualitative research.

While the initial study examined the participant's relationship to risk, the present paper re-examines the data using the literary theory and methods of Northrop Frye (1976). In particular the concept of "themes of descent" is used as a conceptual framework. Denoted by narratives of "growing confusion of identity and of restrictions in action" followed by "descent into a lower world", "isolation and immobility" and where humans are "made more mechanical in behaviour", this approach allows us to see how migrants reflect on their previous lives and how cultural narratives guided their desire to escape (Osbaldiston (2012: 17-27). Conversely, Frye's (1976: 129) "themes of ascent", denoted by narratives of "escape, remembrance, or discovery of one's real identity, growing freedom and the breaking of enchantment" is used to demonstrate how people understand their life after migrating away from the city. Often, as illustrated below in the discussion section, participants use these binaries between good and evil as imaginative templates on which to organise and make meaning of their lifestyles (Osbaldiston 2012; Smith 2008). This enables us to place cultural narrative at the forefront of analysis and produce reflection on how people determine, negotiate and understand contemporary life through different cultural narratives.

## THE CULTURAL THEMES EMBEDDED IN LIFESTYLE MIGRATION STORIES

### Theme one: From consumerism to freedom

I begin the exploration of the themes from this study with a broader push towards critically engaging with consumerism. In recent times there has been a broad cultural reflection on the manner in which we consume and a gentle push back against unfettered consumption (Parkins, Craig 2006). Slow Food for instance has emerged as a counter-discourse to the fast-food industry not just for environmental reasons but for existential concerns over how we spend our time. Embedded in these discourses is a wider cultural concern with authenticity which is, as demonstrated eloquently by Lindholm and

Zúquete (2010), not confined to how we cook our food. Rather, authenticity remains integral to negotiation of the self, including how we consume right through to what social movements we participate in (Lindholm, Zúquete 2010).

The claim here is that there is a broader cultural narrative and concern with inauthenticity that perhaps has linear connections back to earlier discourses in history on how to be true to thy self. Within this study, the evidence of this discourse is seen scattered throughout discussions from participants in relation to consumption. For Jennifer and Chris (names of participants changed), a younger couple about to shift to a rural township in Queensland, the problems of materialism within the city were a major concern. When asked about what sparked their decision to leave, Jennifer strongly asserts that, "I think that [...] the risk of living so close to a lot of other people *is comparing yourself with other people* and you know that whole need to get ahead...and you know to be like the people off the TV and to *be like the people down the street from you*". With a young child at their feet playing, Chris agrees with his partner and pushes the discussion further, arguing that without proper reflective skills, "your mind is focussed on how you are going to pay that off (consumer products), not on you know, saving your money and *having a bit of freedom to do what you want*".

Similar to Chris and Jennifer, Lauren, who had recently moved to a coastal hamlet at the time of the study, viewed her previous place of residence in Sydney as inauthentic. When approached about her motivations for shifting she responds with an air of disdain that, "I got sick of the *fake lifestyle* really, you know no community mindedness, everybody is so, so solitary so, you know *encapsulated in their own sort of space* and just seem to be about just achieving money and not caring about the planet". While in her past she suggests she was 'in danger of not connecting with people' (theme of descent) due to the isolation of Sydney, her new life amongst a smaller community encourages her to be "busy doing stuff [...] fighting with the community to not put high rises up" (theme of ascent) illustrating a triumph over individualism and a re-emergence into spending time achieving meaningful tasks.

What is interesting about these two cases is that the first couple would strongly identify with a middle class background whereas Lauren identifies herself more from the working class, a former sole parent who worked in labour industries and had little money. She reflects on migration as "where the class system comes in" whereby those who "do have the money" are able to purchase large properties ahead of time, attract local labour to manage land and shift later in life with their "pensions and be fine". Whereas for her and her new partner, the migration experience remains difficult in that they have little money and are dependent on welfare for subsistence. Nevertheless, her reflections are countered by a reaffirmation that her new town reminds her of the "good ol' days" where people never "lock up" and care for one another.

This reflection on urban life as narrated by a preoccupation with materialism, individualism and resulting isolation is repeated again through participant narratives such as that of Kristin, a middle aged woman who had shifted from Sydney to a rural farming community. While she initially identifies her belief in the country as a better place to live in her decision to shift, she later reflects on urban life in similar themes as above,

I think there is more of a focus on *self-preoccupation* [...] citizens that are a bit preoccupied and fascinated with their own stuff and that alienates them further really [...] it just seems to me like it's almost, it sounds dramatic to say this, but nearly the *death of the souls of the people or the essence of the people* [...] I sort of hesitate to use the word soul as such but a lot of people are just becoming flaky.

Her identification of this trend in urban culture leads her to make boundaries between how urban people experience the rural versus how others do (see below). In a comparative discourse, Joelene, a single woman who shifted from urban Melbourne to rural Victoria, argues that "[a] lot of people are working for the wrong reasons. They are *working to buy more things to try and make themselves happy* and the reasons that they need to stay in these jobs is that they can earn the money that can buy them

the things, and the things are not buying them happiness". She reflects that through migration, "I have got a lot less things now, but I don't need things anymore".

For both Joelene and Kristin, the shift to rural/regional parts of Australia has enabled a theme of ascent, where life is not just more peaceful and stress-free, but also existentially freer and more meaningful. Joelene for instance defines herself as an "adventurer", making her new way of life more satisfying and enabling a greater sense of self. Kristin on the other hand states that she cannot relate to the city anymore. Not only is materialism and people an issue, but also "traffic jams", "pollution", "anonymity", and "crime", whereas in regional areas there is more of a "sense of tribe" and time is far less constrained. She suggests for instance that

[t]ime was more linear in the city, far more structured and because of what the environment is [...] you couldn't function very well so again you have to adapt to that [...] here it's, yeah *it's almost like cosmos time rather than linear time*, you can blend the two together. It's *a lot freer* cause the people have sort of wound down and it's not the same tempo.

Kristin's comments are important for us to begin to tease out because to date we have found it difficult to consider times as a concept important for lifestyle migration research. By times here we cannot simply consider clock-time but we need to acknowledge, as Barbara Adam (1990) argues, the different timescapes that operate across areas such as age, rhythms of nature, development of infrastructure, politics, and so on. Nevertheless, the conceptual point I am trying to establish in this section is that there is a cultural cringe amongst these participant stories that are not necessarily tied to class (though that needs further investigation) which tracks as a theme of descent into a personalised theme of ascent. Participants experience shifting from places defined by consumerism through to new lives of postmaterialism (see Schor (1998) for discussions of people who experience this through 'downshifting' rather than migration).

## Theme two: Romanticisation of the past in place

Part of the timescape that we need to explore further is the way in which the past negotiates with how people experience the present and how they set up for themselves a dichotomy between authentic and inauthentic experiences of times. Williams (1973) explores this sentiment through how the British middle classes envisage the English countryside as a type of bourgeois relation to the way life used to be. Place here is defined more by its imagined timescape wherein slowness and simplicity abound (cf. Osbaldiston 2012). However, there is something more to this relationship to time that is embedded in the collective and experienced at an individual level.

One way to conceptualise this is again through a dichotomy between themes of descent and themes of ascent which appear throughout participant narratives. In particular, the present (as highlighted in the previous section) is thought of as producing lifestyles that are meaningless. Simmel (1997 [1903]) describes this further as the massification of objective culture that is actually neither meaningless nor meaningful. Rather, the enormity and diversity of things and institutions that surround people require engaging with. The difficulty for Simmel is that there is no capacity for us to be able to accumulate, understand and process everything individually so that they are meaningful to us. But at the same time, rational modernity determines that we cannot ignore them all, whether it be art, law, economics, politics or consumerism.

Simmel's thoughts also resonate with what the participants in this study feel. Chris and Jennifer for instance talk eloquently about how today's modern attitude takes the form of individualism because "everyone has only got so much time and so much RAM in their head to be able to do stuff". In other words, our lives are so busy and cluttered that there is not enough time to be able to process all that we need to. This concern leads Chris in particular to hope that his new life in regional Queensland will offer him opportunities to "slow down" and do things such as play sport, take music lessons and enjoy



other arts. This imagined new life emerges partially as a response to the way in which his own brother experienced his shift to regional Australia.

This response from Chris and Jennifer however is painted by an imagination of the way life could be. Other participants who were already in place in their migration experience recurrently reflect on time in other interesting ways. Firstly, there is a tendency to seek out a lifestyle that was lost to urbanisation. For some, including middle-aged migrant Pamela who had shifted from Sydney down to the Huon Valley in the small island state of Tasmania, migration was not simply a reflection of her attitude towards materialism and urban life. Rather it was founded on a deeply personal relationship to place within place itself. She reflects on her decision to move in this way:

[Our move] wasn't entirely based on how hectic our lifestyle is, we probably took that into consideration but it wasn't a major reason [...] we've lived in the one place for 33 years and it's become a *very busy area* as in population, you know, just everyday living I guess. So we were looking to, *I guess go back to what we had thirty years ago*, peace and quiet.

The theme of descent here is not as culturally significant as perhaps the rejection of consumerism noted in the earlier discussions with others. Rather, Pamela on the surface appears to be motivated by a personally experienced loss of place through overpopulation and a transition of her area into a fast place. While she had originally shifted to what used to be a small beachside location just on the northern beaches of Sydney, it had transitioned over three decades into a bustling and crowded community, which for her was a negative.

Her family's decision to shift to the Huon Valley was embedded in the dichotomy of fast places versus slow places. She continues on her move further that it is like "taking a step back in time if you like, 'cause it is [...] just so much quieter [...] we were looking for something really a lot quieter and *I guess a step back into how life used to be*". As a consequence, the decision to move was guided less by a need to connect to community and more by a desire to avoid a place that would be "commercialised" in the near future; a place that was not only beautiful and pristine but also less likely to attract attention from future developers. Thus in an interesting contradiction to other lifestyle migrants, Pamela exhibits a tendency to seek some isolation and even comments later that she and her husband can survive with their "own company", which she thinks distinguishes them a little from other people.

However, what we might also suggest is that what Pamela seeks is what she believes is a more authentic place. Arguably, her personal story reflects a theme of descent where her peaceful Sydney beach residence had been taken from her through overpopulation. Her response to this is to find somewhere to step back, largely determined by a nostalgia for the way "life used to be". This sort of sentiment is reflected further in other lifestyle migrants. For Tim and Hannah, who moved to Tasmania from Brisbane, the experience of life in a slower community was made valuable to them through their childhood experiences. Hannah in particular, who was initially a transnational migrant from New Zealand as a child, says that

[o]ne of the big things I've noticed is the pace down here [...] it seems to move a bit slower just that little bit [...] it reminds me a bit of growing up in New Zealand, still progressing like the rest of the country, but you're still confident to let your kids walk, and you still go the corner shops [...] there are just things around that are *reminiscent of our childhood and you have a slice of that for your kids*.

Tim on the other hand sees more of a contrast between the way that Brisbane was heading and the way they live their lives now when he suggests that it "looked to me that everything was getting bigger and faster" which pushed him to consider further "how you want to conduct your life". While dissimilar to others in this study in that they sought for refuge in what is essentially suburbia, the coding of their decision making remains well-embedded in a timescape. While Hannah looks back at the way life used

to be with a certain level of romanticisation, Tim looks forward at the future of the bigger city with a degree of fear, arguing that in order to have a more authentic life where he can focus his energy on things that matter such as rearing their children, they needed to migrate.

For these participants, life is now enriched through place which is informed by a particular temporal feel. For others, however, nostalgia for past experiences leads them to question whether they would want to migrate away for lifestyle reasons. This is true of Robert, who was at the time of this project completing his university degree and nearing his thirties. Originally from the country, Robert admits to feeling a certain pull to the country as it provides “soul enriching” experiences such as “sunsets” and glorious “night skies”. However, he contends that part of his motivation to go to university is to escape having to return back to the bush to take over the family business. Nevertheless, his dream is in some ways to have the best of both worlds:

I often think that if I get to where I want to go, I would have a consultancy where I would have some little village in central France, where I can have international clients that *I would travel to and work out of my little cottage*, yeah I love the idea of having some kind of *rural base which you can go back to which you don't have in the city*.

Unlike some of the participants above, Robert’s past experiences and familial circumstances lead him to have an ambivalent relationship to the idea of migrating back to the country. His narrative here is one which is reflective of his own personal circumstances where he is beginning his career, is single and has already experienced life outside the city. Nevertheless as the above quotation suggests, he still romanticises and perhaps accentuates some of the positive dimensions of rural life that lead him to dream and imagine a life where he can regularly escape city life.

### Theme three: Boundary maintenance

One of the features of lifestyle migration research has been the exploration of boundaries and the exploration of how migrants experience place after moving and how communities respond to them (Waldren 1996; Benson 2011, 2014; O’Reilly 2003, 2012). For Benson (2011: 131) in particular, views of migrants towards others exhibits an attitude of distinction where they seek to “distance themselves” from stereotypes “used to describe tourists and other Britons living abroad”. The theoretical link for this proceeds through Bourdieu (1984) amongst others where the battle over what is authentic remains embedded especially amongst the middle classes. Benson and O’Reilly (2009) for instance thread these narratives through the concept of habitus, focussing on the idea that the middle class is more likely in a late/postmodern culture to be self-reflexive and critical of everyday lifestyles.

Throughout the study, a thread is described that runs similar to what Benson (2011), amongst others, discovers in her work. However, as already mentioned some of the participants from this study do not readily identify as middle class. Yet, these participants were quick to establish boundaries and seek for distinction away from others. A good illustration of this is Kirsten, who after critiquing the urban attitude (see above) turns her attention to incoming migrants from the city. She argues:

There are a lot of urban people coming out into regional areas and their bringing that philosophy, that urban conditioning with them and they are actually trying to apply it to regional areas so that they might buy one hundred acres [...] and say ok I’m going to have this lifestyle but they don’t adapt [...] They’re so fearful [...] they just can’t adapt to the idea that it’s ok to be spontaneous and interact with people and say g’day to people [...] *they’re horrified by that*.

In contrast to this, Kirsten argues that she is well embedded in the community, working with locals, sharing food and working in an atmosphere of “reciprocation”. Kirsten’s establishment of these binaries

is similar to that of others. However, in this instance it is other urban escapees who are unable to escape from what she identifies as their habitus (though not in her words). Theoretically, it is interesting to view this, and the manner in which she pushes others into categories in order to protect her own, as an act of identification of a particular group. While Bourdieu (1984) offers us an angle which would relate to class positioning of the habitus and associated capitals, I would argue here that because class is less visible as a contributing factor we ought, as Lamont (2006: 172) argues, to open a nuanced discussion of the structures and “cultural repertoires” through which people like Kirsten construct “group boundaries”. Not only do we therefore examine shared collective imaginations amongst nations but also we need to be able to explore the smaller ones which lie fractured amongst social lines of division (such as class, race, gender, urban/rural backgrounds, etc). The point here is to be able to pick apart “patterns of boundary work not as essentialised individual or national characteristics, but as cultural structures, that is, institutionalised cultural repertoires or publicly available categorization systems” (Lamont 2006: 176).

Kirsten’s attitude towards urban people is not isolated in history or context. Rural researchers from the 60s and 70s demonstrate fully the manner in which rural people feel threatened by middle class escapees and thus lay blame on them for issues of economic inequality and gentrification (cf. Newby 1977). Other lay researchers in migration in Australia have also noted through their interviews that rural people are hostile towards outsiders and strangers (Dowling 2004). It is therefore not surprising to hear that in order to attach herself to the community, Kirsten attempts to provide such a dichotomy between the newcomers and herself. One of the most important factors to consider in boundary work, as Lamont (2006: 182) suggests, is context. In regional Australia in places of high cultural and environmental value, there is a growing unease amongst community members about issues of overdevelopment, loss of place and environmental damage (Osbaldiston 2012). Such a broad cultural narrative speaks to the potential tragic irony of lifestyle migration for people like Kirsten. The very same values people speak of which attract them to the non-metropolitan setting are the same they could be destroying through migration.

As noted earlier, some of these themes are replicated in other stories in which urban culture is almost demonised as individualistic, alienating and anonymous. This sort of boundary-making enables participants to reaffirm their authentic status amongst places and communities that are real and lifestyles the way they ‘ought to be’. However, not all described boundaries in this manner. Returning back to the couple we began this discussion with, Chris and Jennifer, their group identification reveals some stereotyping of rural people. When asked if they felt worried about their impending move to regional Queensland, Jennifer reflects on her distance from the family, while Chris worries about

[f]eeling superior to the rednecks, and I’m deadly serious. I worry about that myself cause I can be *quite elitist* and going out to the country, if I’m bloomin’ walking into a pub and there is some guy called Earl with three teeth and six inches of butt crack, I’m automatically going to go *I’m so much more intelligent than you*, and I’m so that I’m not that skilful that it doesn’t come across [...] and I’m going to end up getting my ass kicked.

Here Chris reflects the counter to the rural/urban disdain proffered by Kirsten. Here he demonstrates an air of confidence in his intellect derived from university education and a stereotyping of rural people. The group membership to which he attaches himself here to be perhaps the high intellectual classes but which also draws heavily on stereotypes to solidify his position. It would be interesting to do a follow up interview with Chris to ascertain how he now feels about his group membership and whether there is room for renegotiation of boundaries or whether he maintains strong allegiances to former social groupings. The point here, however, is that amongst these narratives there is a strong categorisation of groups that are not always strung along authentic/inauthentic lines. As Dowling (2004) demonstrates in her work, political alignment can sometimes create friction for migrants in post-migration experiences if they maintain allegiances to pre-migration group identification.

## CONCLUSION

The point of this paper was to investigate and explore the manner in which cultural sociology provides an alternative approach to understanding lifestyle migration that expands the idea of lifestyle. Using the Strong Cultural Sociology approach in particular positions the researcher in a way that seeks to identify different cultural repertoires that lifestyle migrants use to make sense of and reflect on their migration experience. Through the study revisited above, I was able to trace three specific themes: anti-consumerism, nostalgia for the past and boundary maintenance. In each of these themes, migrants were able to make sense of what they were experiencing and how they understood their lives previously through a variety of cultural repertoires. Some reflected a broad narrative of counter-urbanisation whereas others were more specific and related to capturing moments previously lost in their own lifetime. In each theme, however, the term lifestyle was unpacked through various narratives indicating that lifestyle migration as a concept is flexible and no homogenous meaning can be attributed across groups.

As a final departing remark, I would argue that this point is one where we can begin to distinguish between amenity migration and lifestyle migration. At a broad generalised level, amenity migration as a concept appears to be more driven to empirical relevance. In other words, the clarifying term “amenity” focuses the researcher on place and causes reflection on attractions within place and quantifying the movement (Gosnell, Abrams 2011; Moss 2006; Nelson, Nelson 2010). Amenity is a fixed term that, while informed by different place identities, warrants comparison of one place to another. What this paper suggests, using a cultural sociological lens, is that lifestyle migration is far vaguer and requires exploration of what people think is a quest for a better way of life. Indeed, we have seen that the concept of lifestyle read through culture is fractured amongst the above groups. Though the themes can be drawn together tentatively, the manner in which each participant understood their relationship to for instance the past is dependent on their cultural toolkits and how these structured their experiences. From this perspective, lifestyle migration suggests a quite different approach to amenity migration in that it requires a deeper ethnographic account along with rich theoretical exploration (Benson, Osbaldiston 2014). Cultural sociology enables us to dip our toes into these different theoretical explanations to piece together an understanding of migrant stories and perhaps align them with broader themes and theories found in our culture.

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## POVZETEK

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### SOCIOLOŠKOKULTURNI POGLED NA ŽIVLJENJSKO-STILSKE MIGRACIJE

Nick OSBALDISTON

V pričujočem članku avtor v raziskavo koncepta življenjsko-stilskih migracij vpelje sociologijo kulture oziroma za razumevanje pripovedi življenjsko-stilskih migrantov v Avstralijo uporabi Alexandrovo in Smithovo paradigmo (2006). Medtem ko drugi poskusi razumevanja pojava izhajajo iz Bourdieuevske optike (na primer Benson in O'Reilly 2009), ta pristop za pojasnjevanje lastnih migrantskih izkušenj poskuša predstaviti različne kulturne okvire. Kot v svojem delu o raziskovanju kulturnega življenja pokažeta Alexander in Smith (2006), je to mogoče doseči z analizo, v kateri kultura ni obravnavana kot odvisna, ampak kot neodvisna spremenljivka. S te perspektive je mogoče še zlasti kulturo brati kot besedilo, in tako, sledeč Smithovemu (1999) delu, pričujoči članek na podlagi Fryevih (1976) tematskih okvirov »teme vzponov/spustov« razloži, kako življenjsko-stilski migranti svojo migracijsko izkušnjo tipično predstavijo tako, da poudarijo binarno razliko med življenjem pred selitvijo in po njej. V članku obravnavane tri glavne teme ilustrirajo teorija in empirični podatki iz pripovedi samih migrantov; glavne teme so kritika potrošništva, nostalgija in vzdrževanje meja. V vseh primerih so udeleženci za pripovedovanje svojih migracijskih zgodb uporabili svoj lastni kulturni repertoar in svoja minula življenja v mestu uokvirili s »temo propada«: kot individualizirana, nevarna in nezadovoljujoča. Po drugi strani pa so njihova nova življenja v izbranem kraju uokvirjena s »temami vzpona«: družabna, svobodna in zadovoljujoča. Tak pristop omogoči premagovanje nekaterih omejitev kulturnih analiz po Bourdieuju, predvsem tistih, povezanih z razredno določenostjo. Čeprav je tak pogled kulturne sociologije morda naiven in ignorira strukture kapitala, nam vendar omogoča, da odpremo celo vrsto kulturnih repertoarjev, iz katerih izhajajo ljudje, kakor trdi Lamont (2006). Poleg tega takšen pogled omogoča razumevanje konceptualnih razlik med življenjsko-stilskimi in drugimi migracijami. Ali natančneje, priseljevanje lahko zaradi 'privlačnosti območja' (*amenity migration*), ki je po empiričnih lastnostih podoben življenjsko-stilski migraciji, beremo kot koncept, ki se nanaša na razliko med kraji. Življenjsko-stilska migracija pa je lahko in mora biti razumljena kot sociološki termin, ki se zanaša na razkrivanje kulturnih naracij, ki jih ljudje uporabljajo, da bi pojasnili svojo izkušnjo. Uporaba kulturnih naracij je lahko razdrobljena med skupine, ljudi in posameznike ter zahteva poglobljeno etnografsko raziskavo življenjskih slogov in njihovo razlago s pomočjo sociološke teorije. Na tak pristop naletimo v raziskavah življenjsko-stilskih migracij, sociologija kulture pa nam omogoča, da razvijemo popolnejše razumevanje kulture kot strukture z mnogimi vidiki, ne le razrednimi.

# GERMAN SPA TOWNS AS RETIREMENT DESTINATIONS: HOW (PRE)RETIRES NEGOTIATE RELOCATION AND LOCALS ASSESS IN-MIGRATION

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## ABSTRACT

### German Spa Towns as Retirement Destinations: How (Pre)Retirees Negotiate Relocation and Locals Assess In-migration

The current generation of senior citizens strives for a self-determined way of life and frequently materialises this through relocation to tourist destinations. Based on this premise, this paper analyses German (pre)retirees who are planning or have realised inter-regional lifestyle migration to Bad Fuessing, a spa town in Southern Germany. While recent studies have focused on lifestyle migrants' perspectives in pre- and post-migration lives, this article adds local stakeholders' assessments of age-selective in-migration. It is proposed that locals view the latter ambivalently against the backdrop of demographic change and transformations in health tourism. The article opens up lifestyle migration research to applied questions by considering the economic and social implications for destinations, i.e. it takes into account the structures that frame migration. **KEYWORDS:** tourism, lifestyle migration, ageing, regional development, Germany

## IZVLEČEK

### Nemška zdraviliška mesta kot zeleni kraji upokojitve: kako se (pred)upokojnenci soočajo s preselitvijo in kako jo ocenjuje lokalno prebivalstvo

Trenutna generacija starejših prizadevanja za samostojen način življenja pogosto izraža s selitvijo na turistične destinacije. Na teh premisah članek analizira nemške (pred)upokojnence, ki načrtujejo ali pa so že uresničili medregionalno življenjsko-stilsko migracijo v Bad Fuessing, zdraviliško mesto v južni Nemčiji. Medtem ko so se nedavne študije osredotočale na perspektive življenjsko-stilskih migrantov in njihova življenja pred migracijo in po njej, pričujoči članek dodaja ocene lokalnih prebivalcev, ki nanj gledajo ambivalentno, skozi optiko demografskih sprememb in transformacij zdravstvenega turizma. Članek pri raziskovanju življenjsko-stilskih migracij upošteva ekonomske in družbene implikacije posameznih destinacij, kar pomeni, da upošteva strukture, ki uokvirjajo migracijo.

**KLJUČNE BESEDE:** turizem, življenjsko-stilske migracije, staranje, regionalni razvoj, Nemčija

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## INTRODUCTION

Structural conditions and individual desires at a specific stage of life often result in a change of residence. While younger people relocate in search of better educational opportunities or child-friendly neighbourhoods, (pre)retirees aged 50+ often migrate in order to fulfil a self-determined way of ageing. Accordingly, they plan or even have realised relocation to places considered to be better and thereby follow what Polèse (2009) calls the hedonic imperative, encompassing, for instance, happiness, comfort or beautiful environments (*ibid.* 153).

Research on lifestyle migration discusses extensively the individual's quest for a better way of life in various spatial contexts and with regard to different socio-demographic groups (Benson, O'Reilly 2009; Janoschka, Haas 2014). While research focuses thereby on individual perspectives of the migrants themselves, the insights of the receiving community, i.e. the local inhabitants' views, are rarely considered (except for Balkir, Kirkulak 2009). At destinations, however, various stakeholders create specific structural conditions and (local) political discourses that subsequently may encourage or inhibit migration processes. Furthermore, local inhabitants interact with newcomers to a certain extent and thus co-construct the better way of life (*cf.* Benson 2011). Giving a voice to local inhabitants could thus enrich lifestyle migration research on the implications for destinations.

Lifestyle migration in Europe initially focused on favourable regions affected by mass tourism, e.g. Spain (O'Reilly 2003; Huete 2009; Janoschka 2009a; Kordel 2014a), while recently more peripheral areas, e.g. rural France, have come into play (Benson 2011). Central Europe, however, has not been at the core of interest to date. In Germany, for instance, preferences for tourism-informed regions among lifestyle movers in general and the growing cohort of (pre)retirees in particular are significant. This article discusses inter-regional migration of pre(retirees) to spa towns, i.e. mostly small towns in a rural setting. Spa towns are considered firstly as places where the nexus of tourism and in-migration is observable, because mainly former regular guests decide to relocate (Kordel 2014b). Secondly, socially constructed place-related characteristics such as leisure and health are structural preconditions underpinning migration decisions. Thirdly, these towns show a population gain, which is in marked contrast to an overall trend of rural to urban migration and age-selective out-migration. Besides well-known patterns that frame lifestyle migration, spa towns can be considered as laboratories for both the socio-demographic composition of a population that is projected for large parts of Central Europe in the future, and for processes for coping with the implications of demographic change.

This paper aims to integrate migrants' and locals' perspectives on lifestyle migration and therefore asks how (pre)retirees plan and realise relocation to the German spa town of Bad Fuessing, how they reproduce or alter tourist experiences in their post-migration lives, and finally, how local stakeholders view and react to the in-migration of the elderly.

The article is organised in five parts. Following this introduction, the second part explains the need for integrating local inhabitants' perspectives in order to understand structures and discourses affecting migration, and provides an overview of research on tourism-informed lifestyle migration with special emphasis on health tourism. General implications of demographic change and particular consequences of migration of the elderly are also discussed. The third part focuses on the site of the study, the spa town of Bad Fuessing, considering especially its significance with regard to inter-regional migration patterns, and explains the research methods applied. Fourthly, empirical results are presented from both migrants' and local inhabitants' perspectives, i.e. discussing planning efforts to relocate, post-migration lives and issues of the governance of migration. Finally, implications for future research prospects on applied questions of lifestyle migration are discussed.



## CURRENT SITUATION

### Lifestyle migration research in need of locals' perspectives

In considering relatively affluent individuals moving to places that signify a better quality of life (Benson, O'Reilly 2009), lifestyle migration research has recently focused on representations of a better life and how such images have been altered or reproduced in post-migration lives in manifold ways. With regard to the decision to move, Benson (2012) suggests that it "is reached through a combination of individualised biographies, trajectories and actions, as well as wider cultural contexts and structural conditions" (ibid., 1681). While cultural contexts have been the focus of interest in lifestyle migration research, political framings and discourses have barely been taken into account. Greater focus on the latter may result in establishing certain representations and images of receiving destinations, which subsequently may encourage or prevent further in-migration. This is especially important for regions which do not project a marketable image, but are considered to be peripheral and in need of support, such as Central European rural areas.

Specific structural conditions, both at sites of origin and destinations, affect migration processes. The right to free movement and settlement is a peculiarity of the European Union (Ackers, Dwyer 2004), while structures framing the tourism-migration nexus have been discussed in various spatial contexts (for Spain cf. Rodríguez 2001; Huete 2009; for Latin America cf. Janoschka 2009b). Real estate properties initially planned for recreation purposes have been adapted as permanent dwellings, and leisure infrastructures are extensively used in post-migration lives in order to reproduce a leisure-oriented way of life (Kordel 2014a).

Political discourses about in-migration and specific structures on site not only affect the migration decision, but also shape how local people think about newcomers. It is assumed that political framings and structural conditions are reflected in local inhabitants' opinions about the existence and practices of lifestyle migrants (Janoschka, Haas 2014: 7). While some studies have focused on how local inhabitants resist newcomers and discussed gentrification processes as a consequence of lifestyle migration / residential tourism (Janoschka 2009a; Janoschka 2009b; Bastos 2014), this contribution takes into account the planning process of migrants and local authorities as well as the implications of lifestyle migration for destinations. The assessment of existing and possible newcomers is central to this contribution. For this purpose, the article firstly considers overall political discourses on demographic change as well as its concrete political implementation in a spa town in Central Europe. Secondly, transformations in key local industries, e.g. health tourism, are of focal interest when analysing local responses to in-migration of a specific socio-demographic group, e.g. (pre)retirees.

### Encountering lifestyle migration through health tourism

In Western societies, good health and wellbeing are now considered as core values (Pforr et al. 2014: 100). So it is not surprising that places labelled as "healthy" are discovered by lifestyle migrants. An impressive example of the search for a life considered better or in contrast to the life left behind (Benson, O'Reilly 2009) is the mountain village of Vilcabamba in the Andes of South Ecuador, which maintains the myth of being located in the "Valley of Longevity". Here, lifestyle migrants pursue practices associated with a physically and mentally healthy way of life, e.g. cultivating organic food or doing yoga (Kordel, Pohle 2013). Certain structures of health tourism that commodify the increasing consciousness and demand for health proliferate.

Health tourism becomes impressively manifest in spa towns, which have a long-standing history throughout Europe. Based on water-induced treatments, the Romans built sophisticated baths and travelled to spas for therapeutic purposes; balneotherapy as a medical treatment was promoted during

the Renaissance, and the town of Spa, in Belgium, developed as a popular place for European aristocracy in the 18<sup>th</sup> century (Smith, Puczkó 2013). Amidst the saline baths of Bad Reichenhall, Germany, for instance, a spa culture was developed which combined “the pleasant and the useful, a unique blend of modern medicine, urbane entertainment, and Alpine views that catered to both middle-class and elite tastes” (Rosenbaum 2014: 41).

To date, there are more than 250 officially registered spas and health resorts in Germany. Based on the (natural) source of their curative effects, e.g. climate, water, therapeutic philosophy, they are classified in six categories (Deutscher Heilbäderverband 2011).<sup>1</sup> *Kur*<sup>2</sup> treatments encompass tourist stays of three or more weeks’ duration and represent an important pillar for tourism. Yet, from the 1990s on, a structural crisis based on cutbacks in social security for cures formerly financed by health insurance companies was recognised in spa towns (Pforr, Locher 2012). As a consequence, tourists had to pay for their stays mostly from their own pockets. Regressive durations of stay result in a need for attracting more visitors in order to maintain the existing infrastructure.

While there are no adequate studies of German spa towns, Michalkó and Rátz (2010) discussed tourism-induced migration for spa towns in Hungary: “Tourists, who wish to regularly benefit from the medical qualities of the waters and the associated medical treatments, may decrease their costs of stay [...] by buying their own property” (ibid., 131). Already existing in the socialist era, spa towns were considered as favourable sites for purchasing second homes and subsequent retirement retreats (ibid., 139). Even nowadays, the latter contribute to a more sustainable development, as their use is less seasonal.

Individuals who purchase holiday homes “with an eye on retirement” (Polèse 2009: 170) show planning efforts to relocate at an early stage. Accordingly, lifestyle migration to spa towns confirms the widespread assumption that migration cannot be separated from tourism (Rodríguez 2001).<sup>3</sup>

## Ageing in Central Europe: coping with demographic change, consequences for migration patterns and political discourses

Since the late 1990s, debates about demographic change and implications on various spatial scales have come to the fore in Central Europe (Steinführer et al. 2014). Addressed as a quantitative shift of the age structure of a population, i.e. ageing and population decline, structurally weak areas are particularly affected by this process. Peripheral rural municipalities subsequently face a downward spiral (ibid., 347f.). Shrinking populations result in lower tax revenue, and the provision of public services and infrastructure is thus endangered as costs of maintaining infrastructure increase. Accordingly, the provision of medical facilities, for instance, is challenged, firstly when public hospitals can no longer be maintained, or secondly when doctors are unwilling to settle in rural areas (Swiaczny 2010: 200). Demographic decline and ageing result in the loss of various forms of capital that is proved necessary for successful coping and adaptation (Steinführer et al. 2014: 346). Commonly, “an increase in population is in a way seen as an indicator of success, where the media designate ‘winner’ and ‘loser’ municipalities and the politicians are cheered or blamed, respectively” (Niedomyśl 2004: 1992).

- 1 Mineral, thermal and mud spa resorts; healing climate health resorts; seaside spas and resorts; health resorts with healing caves and radon therapy; aerotherapy health resorts; Kneipp spas and health resorts (Deutscher Heilbäderverband 2011).
- 2 *Kur* treatments are considered as “specific medical prevention, convalescence and rehabilitation program or treatment for particular chronic diseases” (Pforr et al. 2014: 105). They have been funded by the various German health insurance funds when recommended and prescribed by a general practitioner (ibid.).
- 3 Considering interdependencies of tourism and retirement migration with regard to structural preconditions, the concept of tourism area evolution suggests that amenities foster the development of leisure infrastructure (Butler 2006). Brown et al. (2001) argued that retirees are already attracted in the development stage and “retirement grows alongside tourism” (ibid., 51), as visitors form various links to the destination.

As a consequence, the need for political intervention was recently raised among political leaders. Measures that enable people to age in place, for instance mobility solutions, the provision of age-appropriate infrastructure in terms of local supply and health, were initiated for the elderly (Wytrzens et al. 2014). Other fields of action encompass attraction policies for enterprises and repopulation initiatives (Schmied 2005; Eimermann 2014). The latter, for instance, comprise financial incentives for young families, e.g. reduced real estate costs (Steinführer et al. 2014: 357). Since initiatives for repopulation were undertaken as strategies to cope with the implications of demographic change, it has to be noted that in-migration of the elderly is discussed controversially, as both a boon and a burden (Haas 1990). Various studies, mainly carried out in the United States, have highlighted the implications of retired migrants on destinations (Skelley 2004), stressing positive impacts on the real estate market and in the construction sector (Vollet et al. 2005: 56). Retirement migrants spend money (which was earned elsewhere) in the community – on real estate, food, entertainment and health services (ibid.; Polèse 2009: 163f.). However, in-migration of (pre)retirees may result in rising real estate prices, which can displace young families (Brown et al. 2011: 70). Subsequently, land use conflicts may arise between retirees and economic activities at destinations, e.g. farming and industry (Vollet et al. 2005: 66).

Migrants can also be an important social resource for communities as they are mostly considered to be relatively better educated and skilled. Moreover, they are more likely to be involved in civic engagement. As a consequence, various stakeholders, for instance civic organisations or local governments, can benefit from the knowledge of newcomers (Skelley 2004: 213). Newcomers may also stimulate the arts and cultural scene (Brown et al. 2011: 70). However, senior citizens “who become active in civic and cultural affairs can be insensitive to the needs and preferences of longer-term residents” (ibid.).

## PAVING THE WAY – SITE OF STUDY AND METHODS

### Spatial patterns of inter-regional retirement migration in Germany

Friedrich (2008) pointed out that ageing in place predominates in Germany (ibid., 192). Those (pre)retirees who actually decide to relocate within Germany,<sup>4</sup> crossing borders of municipalities, mostly move within the same *Bundesland* (state) at a short distance. About 30% cross state borders, while some are “short-distance moves in urbanised regions” (Friedrich, Warnes 2000: 110), e.g. between federal city states of Hamburg or Berlin and the surrounding states.<sup>5</sup>

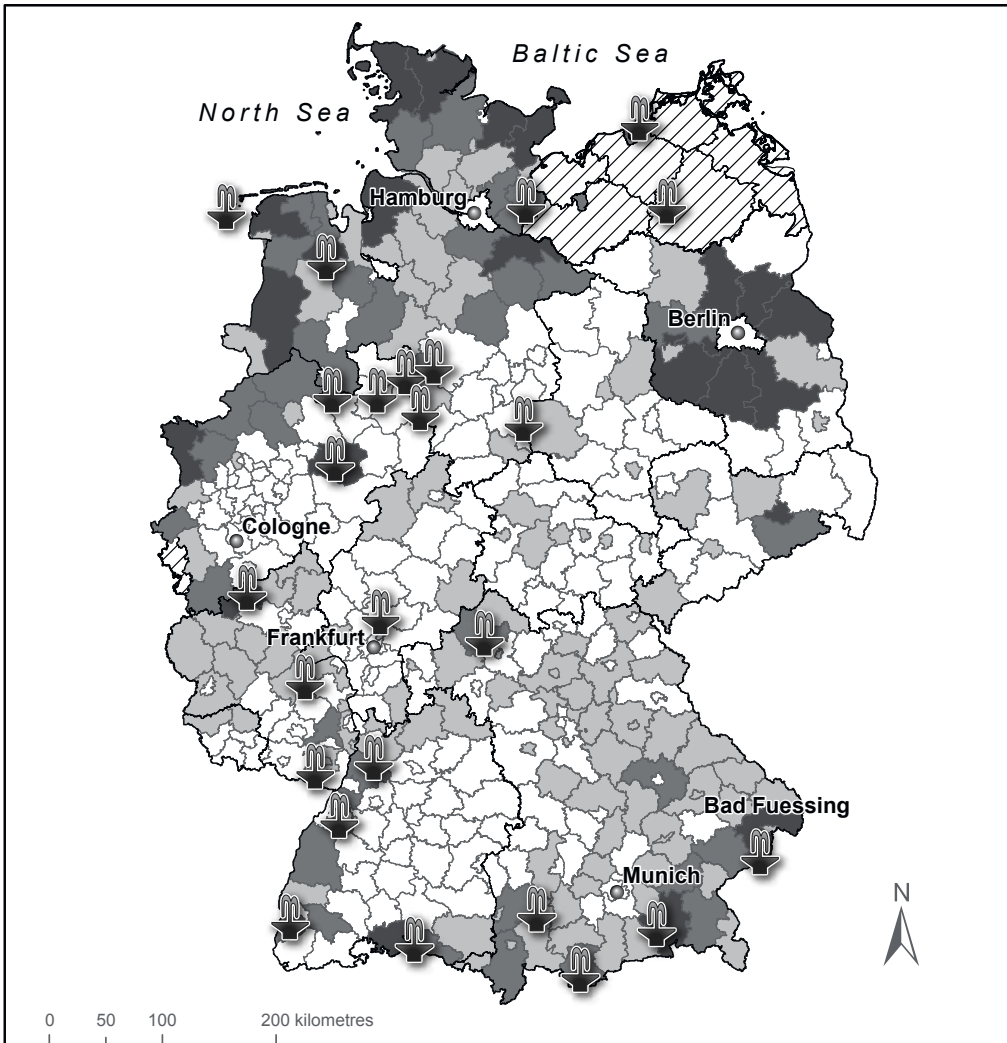
To date, the general spatial pattern of inter-regional retirement migration in Germany is characterised by net shifts of people towards less populated areas, i.e. down the metropolitan hierarchy. An exception is East Germany, where urbanisation tendencies predominate (Friedrich, Warnes 2000: 110). As indicated on the map (Map 1), positive cumulative 5-year age-selective net migration of (pre)retirees aged 50+ predominates in tourism informed regions (North Sea Region, Baltic Sea Region, Alpine Region) and the surrounds of Berlin and Hamburg. Accordingly, spa towns represent a significant proportion of municipalities facing age-selective in-migration. With regard to the 25 most attractive spa towns in Germany among people aged 50+ (cf. Map 1), net migration influx ranges between 310 (Bad Rothenfelde) and 800 (Bad Neuenahr-Ahrweiler) in a 5-year period.

4 In 2012, only two percent of German population aged 50+ relocated intra- or inter-regionally (Statistische Ämter des Bundes und der Länder 2015; cf. Austria 1.4%, Statistik Austria 2015).

5 An international dimension of German retirement migration has come to the fore since the 1970s (Goltz, Born 2005; see case studies carried out by Casado-Díaz et al. 2004; Janoschka 2009a; Kordel 2014a).

# Inter-regional net migration in Germany

5-years cumulation 2008-2012, age cohorts 50+, NUTS 3 level



## Legend

Cumulative age-selective net migration 2008 - 2012 (50+)

- < 0
- 0 - 500
- 501-1000
- > 1000
- no data available
- M
 Spa town

Concept: Stefan Kordel  
 Data treatment: Tobias Weidinger  
 Cartography: Florian Dworzak  
 Data source: Statistische Ämter des Bundes und der Länder, dl-de/by-2-0

Map 1: Age-selective net-migration in Germany

## The spa town of Bad Fuessing as a retirement destination

The spa town of Bad Fuessing, a popular destination for health and spa tourism, is located in south-eastern Germany in the district of Passau, close to the German-Austrian border (see Map 1). Situated on the river Inn, the area is characterised by a flat relief and is subsequently easily accessible to people with physical constraints. The thermal spring was discovered during oil prospecting in 1938, while the thermal bath was established after World War II. Since 1971 Bad Fuessing has been assigned the label “Bad” (Pietrusky, Wisbauer 1977). Together with the neighbouring spa towns of Bad Griesbach and Bad Birnbach, the area is known as the “Lower Bavarian thermal bath triangle”.

Apart from large metropolitan areas such as Munich, Berlin or Hamburg, Bad Fuessing is the most important tourist destination in Germany and the most frequented spa in Europe (Statistische Ämter des Bundes und der Länder 2015). In the course of structural transformations in health tourism, durations of stay decreased from 13.0 days in 2000 to 8.7 days in 2012. In 2012, the number of registered guest arrivals was 273,326, i.e. 2,372,152 overnight stays, respectively (considering accommodations of more than 9 beds, Bayerisches Landesamt für Statistik und Datenverarbeitung 2014: 15).

Alongside its tourist development, the population of Bad Fuessing has increased (1970: 3,848 inhabitants; 2012: 6,702 inhabitants; see Table 1). As death rates have surpassed birth rates since 1985, only an influx of population can explain this growth. The latter is increasingly age-selective, i.e. (pre) retirees aged 50+ predominate (214 individuals, 44.9% of total influx in 2012).

		2000	2008	2012
<b>Bad Fuessing</b>	Total Population	6,442	6,700	6,702
	Proportion of (pre)retirees (50+)	44.4%	54.3%	58.0%
	Influx of (pre)retirees (50+, absolute)	186	225	214
	Gender sensitivity of influx of (pre)retirees (50+, proportion of women)	54.8%	56.0%	55.1%
	Proportion of influx of (pre)retirees (50+) in relation to total influx	34.8%	44.1%	44.9%
<b>Germany</b>	Proportion of (pre)retirees (50+)	35.6%	39.3%	41.9%

Table 1: Key demographic figures for Bad Fuessing (source: Statistische Ämter des Bundes und der Länder 2015).

## METHODS

Empirical data were collected through the application of two methods. Firstly, six biographical-narrative interviews were conducted in Winter 2011 in Bad Fuessing. Secondly, ten guideline-based interviews were conducted with a variety of local stakeholders in order to determine locals' views of age-selective in-migration.

The biographical-narrative interviews were designed to encourage the integration of autobiographical experiences with wider structural framings (Rosenthal 1995), i.e. to elaborate prospects and manifestations of relocation and address evaluations of practices in post-migration lives. Interview partners were selected at public places on a weekend according to the aim to cover both groups, potential and current newcomers, who were mainly in good mental and physical health. The sample of interviewees finally consisted of mostly couples aged between 51 and 85 years (see Table 2). For ethical considerations, all names of biographical-narrative interviewees were replaced with pseudonyms.

Interview	Pseudonym	Age	Sex	Civil status	Relocation status
BI-1 (Biographical-narrative Interview 1)	Walter	51	male	single	Regular visitor, owns house at place of origin, does not plan to relocate during working life
BI-2	Herman Josephine	70 70	male female	couple	Relocated two months ago
BI-3	Otto Renate	64 57	male female	couple	Regular visitors, own house at place of origin, plan to relocate in the future
BI-4	Thomas Patricia	77 77	male female	couple	First-time visitors, do not plan to relocate in the future
BI-5	Anna Gundula	85 79	female female	single single	Relocated 11 / 15 years ago
BI-6	Klaus Barbara	82 n/a	male female	couple	Relocated three months ago

Table 2: List of interviewees

Ten guideline-based interviews with local stakeholders were conducted between December 2011 and September 2013. Interviewees include representatives of local associations and local administration as well as stakeholders in the tourist industry. The variety of interviewees enabled the researchers to obtain insights into local assessments of in-migration from various social groups affected by either demographic change or structural transformations in tourism, e.g. tourism, social life (associations) and ageing. Semi-standardised interview guidelines were used to make statements comparable.

All interviews were conducted in German. After obtaining approval from the interviewees, they were recorded and finally transcribed and translated into English. Systematic analyses were undertaken by means of qualitative content analysis (Mayring 2000).

## RESULTS

### Individuals' relocation processes and beyond

People who relocated to the spa town of Bad Fuessing retrospectively view the migration process as a quest for new experiences and with regard to notions of sociability over the entire year.

Gundula: There is always something going on. At other places, there is no action in November. Here, there are always people around me. My husband has always been curious about the world and liked it here. At the beginning, we were in Bad Fuessing for holidays and then decided to relocate. (BI-5)

One couple explicitly point out a contrast to previous life experiences in metropolitan areas and perceive life in Bad Fuessing as more healthy and age-appropriate. The wife accordingly states:

Josephine: We wanted to get out of the city, away from city life. So we chose this area which is great for elderly people considering their health. There are no mountains so no exhausting uphill and downhill routes and the fresh air, almost no air pollution – not to mention the health spas and the thermal baths. (BI-2)

Well some of them have come here regularly once, twice or even three times a year over the last 20 to 40 years to take a cure. They experienced the healing water actually improving their condition and saw themselves moving here after retirement. Furthermore, the landscape here is fairly flat which is very important for elderly people. (Representative of a church, male)

Even local experts such as a representative of a church affirm tourist experiences as regular guests and emphasise the curative effects of healing water. The latter is important for both rehabilitation and the prevention of constraints related to the ageing process. It became obvious that the formation of powerful links to resort communities among (pre)retirees resulted in permanent relocation (cf. Haas, Serow 1993).

When relocating, particularly in older age, specific planning efforts are undertaken "to minimise the risks related to property acquisition" (Åkerlund 2013: 638). Despite the fact that the current generation of (pre)retirees in Europe is on good pensions, the choice of a future residence is driven by the individual's financial situation and the local real estate market (Kramer, Pfaffenbach 2009: 163; Benson, O'Reilly 2009). The following quotation refers to the latter:

Herman: Before we decided to relocate, we took a trip throughout the state of Bavaria. We visited the lakes south of Munich, Lake Starnberg, Lake Ammer, Lake Chiem. And you have to recognise: apartments in Bad Fuessing are up to half the price compared to the Munich surroundings. [...] It is cheaper and it is easier to find accommodation. (BI-2)

Planning efforts regarding property also include considerations about whether it makes sense to buy or rent. A couple staying in Bad Fuessing for tourism purposes several times per year decided not to move to Bad Fuessing for the present due to economic considerations. While tourism mobilities and multi-local living arrangements, respectively, go along with an opportunity to enjoy the best of both worlds (Huete 2009: 46), a relocation to one place would diminish the benefits of the other.

Otto: We thought about getting an apartment. But after calculating everything it just isn't financially worthwhile. If you want to buy a nice apartment, you'll have to spend about EUR 50,000 to 70,000. As soon as you invest EUR 70,000 you have to come here more often. [...] Residing here, you're bound to this town but that's what we actually don't want to be; for a few months that might be okay but not for longer.

Renate: We alternate locations to enjoy the respective benefits. We don't want to do without the cultural scene of Munich and the shopping facilities. (BI-3)

Once the decision to live in Bad Fuessing is made, the search for an appropriate dwelling begins. The latter is characterised as a self-determined process, without having to rely on real estate agents.

Barbara: We were in contact with an estate agent. I can't recall her name but she told us: 'You won't get anything in Bad Fuessing.' Then we stayed at Schweizer Hof [a hotel in Bad Fuessing, author's remark] for the Christmas holidays and I previously subscribed to the Passau newspaper so I could check the housing market at home. I told my husband that I had brought some interesting newspaper ads with me and that we should have a look at them. And among them was our apartment. [...] The estate agent just wanted to flog us an apartment and showed us one after the other. But we didn't want to be exposed to more stress so we would be able to go into a retirement home if necessary. (BI-6)

In contrast to multi-step migration in older age (Litwak, Longino 1987), individuals include the anticipation of future care needs in the first move (Oehmke et al. 2007: 97) and take into account the availability of structures of care on site, e.g. retirement homes, when deciding to relocate. The local perspective on the

availability of real estate according to the specific demands stated above is ambivalent. A representative of the department of spatial planning recognises patterns that reflect the tourism-migration nexus:

Some guests who will retire soon are already looking for properties and apartments, primarily apartments of high quality. [...] It can be observed in apartment construction that those small apartments with one or two rooms are no longer constructed, but apartments with a living space of 90 to 100m<sup>2</sup> or even larger. (Representative of the department of spatial planning, male)

Contrary to the widespread assumption of downsizing living space in older age (Angelini, Laferrere 2012), age-appropriate small-size apartments are rare. The construction industry does not respond to that specific demand, but provides larger flats.

### **Post-migration lives: leisure practices, attachments to place and contestations**

Practices in post-migration lives are reproduced with regard to both specific structures and individual desires that formerly fostered migration. The following quotation exemplifies everyday life in Bad Fuesing, individually addressed as leisure-oriented and associated to specific cultural offerings on site.

Anna: I never regret having moved here. I think it is very comfortable for senior citizens. [...] Pedicure, manicure, practising gymnastics for elderly people once a week. Yes, that's what we do, well. And going to the older people's club for games night and stuff like that. [...] Eichberger [coach service, author's remark] hosts one-day trips which we take part in from time to time or even two to three-day trips that we like to join. [...] Well, once a week we go to the cinema. [...] It's just around the corner, we're able to, well, in a manner of speaking, we can go to the movies wearing our slippers. (BI-5)

Leisure practices are facilitated by appropriate infrastructure in the vicinity. Shorter distances between facilities is viewed as positive among many interviewees, acknowledging that they can now do everything on foot and do not need a car. The flat relief enables further leisure activities such as cycling or walking. The specific tourist infrastructure of thermal baths, however, does not seem to have meaning in everyday life at present.

Anna: I don't want to say it aloud, but I have never been in the thermal baths. I don't need it at the moment. (BI-5)

Herman: Never. Up to now, never. We did not have time to. It was quite crowded. A further problem is that it is too expensive for locals. (BI-2)

Interviewees stress health and economic considerations for not visiting thermal baths. In the case of age-related constraints however, (pre)retirees may remember the curative effects of healing water experienced during previous stays, and seek out the thermal baths. The motivation to relocate to Bad Fuesing, initially associated with health-related issues, is not reproduced at present, i.e. it can be marked as inactive. Another negatively-viewed aspect refers to crowding in thermal baths. Both interviewees thereby dissociate themselves passively or actively from ordinary tourists and construct identities of belonging (O'Reilly 2003, cf. "We live where others spend their vacation or go for a cure" (Herman, BI-2)). Newcomers in Bad Fuesing frequently stick to themselves in everyday life, but do not live in a bubble as stated elsewhere (Fechter 2007). An attitude of reserve towards approaching locals is depicted in the following statement:



The newcomers often don't have the courage to approach the locals. I tell them to try and join the conversation and so on [...]. And the locals on the other hand want to keep to themselves, they are reserved with the North Germans and standard German speakers [...]. But there are people who breach that wall, they just come here without any further information, they like to discover and experience everything by themselves and therefore are integrated somehow. But that only applies to a few newcomers. (Representative of a church, male)

The desire to interact with local residents was recognised, for instance, by a representative of a social organisation, who initially came to Bad Fuessing to retire. Having experienced obstacles upon arriving four years before, she decided to organise a regular encounter:

We host a social get-together every month by the Caritas [German Catholic charitable organisation, author's remark]. It takes place at our parish hall. Everybody is invited: locals, spa guests and newcomers. It's primarily meant for newcomers to socialise and for spa guests who maybe would like to move here someday. It's just a casual get-together for about two hours in the afternoon with singing, having coffee, making conversation and sharing some gossip. It's fun. (Representative of social association, female)

What becomes obvious in the quotation above is the aim to assemble tourists, newcomers and locals at one specific place. The purpose is to establish attachment to place and provide assistance for potential newcomers. The latter supports the assumption of a systemic continuum of tourism and lifestyle migration. Contestations arise when individual circumstances, such as the death of a spouse, challenge autobiographical insideness (Rowles 1983). When it comes to the decision to move back, social organisations once again undertake efforts to help those people moving back to their hometown. In sum, the nexus of tourism and migration provides a setting for interactions and could be viewed as a tool for integration.

## Issues of governance in light of demographic change

The implications of lifestyle migration for destinations must consider the assessment of age-selective in-migration from the local inhabitants' perspective. There are stakeholders in persons or respective legislations, promoted by interest groups, e.g. the tourist industry, which indirectly or directly provide structures which foster or limit migration. The following quotations indicate that Bad Fuessing wants to provide an age-appropriate setting for the elderly on the one hand, but economically relies on the young generation on the other:

While many other townships only see the drawbacks of the demographic ageing of their citizens, we want to create an environment comfortable for the elderly. Bad Fuessing wants to rely on the older generation in the future. [...] We want to be a town where the interests of the elderly are considered and taken seriously. (Mayor, cit. after Gemeinde Bad Fuessing 2010: 10)

This ageing has long-term and serious consequences for communal life. The young generation will soon be lacking everywhere. But neither politicians nor scientists nor other experts could work out how to compensate for the attraction of the big cities and make the rural life more attractive to the young. Do we have to accept this trend of ageing? (Mayor, cit. after Gemeinde Bad Fuessing 2013: 1–2)

These statements, made by a local politician, reflect current attitudes towards senior in-migration in Central Europe, which reinforces the implications of demographic change. Particularly in rural areas with selective out-migration of the young, stakeholders view the proliferation of ageing municipalities through in-migration sceptically.

Moreover, selective out-migration and depopulation can affect social cohesion, for instance, when local associations lack members (Swiacny 2010: 200). Newcomers may become members of existing local associations and sometimes guarantee their continuity. The board of the Catholic Women's Association of Bad Fuessing could only be formed because three newcomers volunteered for positions among the six board members:

Two of them are Protestants but we don't mind. We're happy when they participate. They like to play an active part even though women's associations are not common among the Protestants. (Representative of a church, male)

As previously noted, in a study on Russian second home owners in Finland, "involvement may encourage social and economic investment in the community" (Lipkina, Hall 2014: 162) in the long run. With regard to the real estate market, transformations in the tourist sector shape structures that are reflected in local politics. Despite the fact that many tourist accommodations dropped out of the market in the course of transformations in health tourism, in most cases they cannot be rededicated to permanent dwellings because of existing land development plans favouring tourism. When exceptions are made, in some cases, age-selective in-migration to vacant tourist accommodations is assessed positively with regard to maintaining local supply:

Basically, we believe that we have to prevent vacancies and decaying buildings, and therefore have to rebuild apartments here, which will be willingly accepted by the age group. Especially because the infrastructure in these districts will be maintained in this way. (Representative of the department of spatial planning, male)

With respect to the transformations in health tourism, the local administration recognises the need to change land development plans according to changing demands:

Changes of use should be undertaken, especially considering residential development. [...] We're right in the middle of it. And there's the question: What are we doing? How far will we go? (Representative of the department of spatial planning, male)

Political stakeholders seem to be quite indecisive when they have to acknowledge decaying accommodations but rising demand for housing space. Similar conflictive scenarios between tourism purposes, local opinions and demands from newcomers, recently discussed in Spain and Latin America, and which led to political mobilisation to a certain extent (Janoschka 2009a; Janoschka 2009b), were not observable in the case of Bad Fuessing. In the context of the overall challenges of demographic change, municipalities find context-specific solutions with which to cope. Currently, there are competing opinions among stakeholders, especially among tourism entrepreneurs. They have strong political influence in the spa town and are sceptical about in-migration because they fear losing guests. Also, the representative from the local building department anticipates a possible negative image of a community with a large number of retirees (cf. Vollet et al. 2005). Moreover, "it is more 'politically correct' to aim at attracting families" (Niedomysl 2004). The latter becomes obvious, for instance, when local authorities limit purchasing building sites to local families. To date, no marketing efforts to encourage (pre)retired in-migration are indicated in the case of Bad Fuessing:

Advertising to the elderly? No, we do not encourage this. The local council is split. This is why we have hired a consulting agency to analyse the opportunities. This would be interesting, what should we actually do? (Representative of the department of spatial planning, male)

## CONCLUSION

This paper aims to analyse inter-regional lifestyle migration to the German spa town of Bad Fuesing and highlighted individuals' planning efforts to effect relocation, as well as practices in post-migration lives. Relocation efforts are mainly based on economic considerations, while individuals also address representations encompassing opportunities for living a leisure-oriented and healthy way of life that were experienced during previous tourist stays.

The article highlights the tourism-migration nexus in various dimensions. While former experiences and real estate structures have been highlighted elsewhere (Huete 2009; Åkerlund 2013), several stages of transition between tourism and migration became obvious. Within the planning process of relocation, (potential) newcomers reflect on their duration of stay and the economic benefits regarding purchasing or renting real estate. What has not been a focal point of interest so far at this stage of the migration process is that social organisations recognise newcomers' needs and have an influence on relocation. This strategy of providing assistance includes tourists, newcomers and local people and targets both the relocation process itself and subsequent daily life at the new site of living. As previously noted in lifestyle migration research (Benson, O'Reilly 2009), migrants alter the initial motivation to move in post-migration lives. Newcomers abandon practices perceived as touristic, e.g. visits to thermal baths, but maintain others, e.g. excursions. Nonetheless, (pre)retirees migrating to spa towns anticipate future care needs and ageing constraints and subsequently view relocation to such towns as permanent, in contrast to other lifestyle-oriented moves viewed as temporary life projects.

Local assessments of age-selective in-migration respond to individual representations and practices of a better way of life on the one hand, but have to be addressed in the light of specific initial situations on site on the other. In the case study at hand, the real estate market is characterised by structures which only permit tourist use and which do not acknowledge the specific demands of elderly newcomers. Thus, vacant properties arising in the course of transformations in health tourism could not be converted to permanent dwellings. Moreover, limited availability in housing supply compels the municipality to subsidise a specific socio-demographic and socio-economic group, e.g. families. To sum up, age-selective in-migration of (pre)retirees to spa towns faces challenges. It is evaluated positively, particularly when newcomers could use vacant property and, subsequently, maintain a demand for infrastructure and services (tourist infrastructure, local supply and medical care). To date, however, in-migration is not considered as a coping and adaptation strategy for the implications of demographic change in hegemonic political discourses. As shown for spa towns, (pre)retirees could diminish the consequences of demographic change, but are viewed sceptically by local stakeholders. Due to ambivalent perceptions, the municipality is seeking advice from a consulting agency in order to get recommendations for future action.

As suggested in this article, lifestyle migration research should focus more specifically on the implications of heterogenisation processes, thereby opening up lifestyle migration research to applied questions in the future. Therefore, it is necessary to better understand both the perspectives of the migrants themselves as well as local responses and views. The latter, in particular, should receive more attention under the umbrella of lifestyle migration. Further research questions should address the realm of social cohesion, i.e. analyses of cooperation and conflict between newcomers and local inhabitants. Matching the demands or needs of migrants with policies reflecting discourses and structures at destinations could result in recommendations for certain stakeholders as to what is lacking. Moreover, research prospects should take into account the implications of relatively affluent newcomers on local economies and evaluate whether specific attraction policies could be applied.

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## POVZETEK

### NEMŠKA ZDRAVILIŠKA MESTA KOT ŽELENI KRAJI UPOKOJITVE: KAKO SE (PRED)UPOKOJENCI SOOČAJO S PRESELITVIJO IN KAKO JO OCENJUJE LOKALNO PREBIVALSTVO

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Sedanja generacija starejših prizadevanja za samostojen način življenja pogosto izraža s selitvijo na že znano turistično destinacijo. Strukturni pogoji, ki podpirajo migrantske odločitve, so družbeno skonstruirane značilnosti, povezane s prostorom – denimo zdravje in prosti čas. Zato zdraviliška, večinoma majhna mesta v podeželskem okolju, ki nudijo številne priložnosti za prostočasne dejavnosti in imajo odlično zdravstveno infrastrukturo, prikazujejo prirast prebivalstva, kar je v nasprotju s splošnim trendom migracij s podeželja v mesto in starostno povzročenim izseljevanjem. Kot taka so mala mesta lahko laboratoriji tako za opazovanje socialnodemografske sestave populacije, kakršno v prihodnosti predvidevamo za velik del Srednje Evrope, kot tudi spopadanja z implikacijami demografskih sprememb. Na teh premisah članek analizira nemške (pred)upokojence, ki načrtujejo ali pa so že uresničili medregionalno življenjsko-stilsko migracijo v Bad Fuessing, zdraviliško mesto v južni Nemčiji.

Medtem ko so se donedavne študije osredotočale na perspektive življenjsko-stilskih migrantov in njihova življenja pred migracijo in po njej, pričujoči članek upošteva proces načrtovanja migrantov in lokalnih oblasti na eni strani, na drugi pa tudi vpliv življenjsko-stilskih migracij na destinacije. Skladno s tem se prispevek osredotoča na mnenja lokalnih deležnikov o priseljevanju posameznih starostnih skupin. Empirični podatki obsegajo biografsko-narativne intervjuje s (pred)upokojenci in vodene intervjuje z različnimi lokalnimi deležniki. Rezultati kažejo, da lokalni nepremičninski trgi poudarjajo strukture, namenjene izključno turistični rabi in ne upoštevajo specifičnih zahtev starejših prišlekov, medtem ko družbene organizacije prepoznava njihove potrebe in s tem vplivajo na preselitev. Ta strategija zagotavljanja pomoči je namenjena turistom, prišlekom in lokalnemu prebivalstvu ter cilja tako na sam proces selitve kakor tudi na nadaljnje vsakdanje življenje v novem kraju bivanja.

Po migraciji prišleki opustijo t. i. turistične prakse, npr. obiskovanje termalnih kopeli, ohranijo pa druge, npr. izlete. Ne glede na to pa (pred)upokojenci, ki migrirajo v zdraviliška mesta, predvidevajo prihodnjo potrebo po negi in omejitve, ki jih prinaša staranje. V nasprotju z drugimi življenjsko-stilskimi selitvami, kot so začasni življenjski projekti, se starejši preselijo za stalno. Lokalno prebivalstvo priseljevanje ocenjuje kot pozitivno, še zlasti, kadar se migranti vselijo v stavbe, ki so se izpraznile zaradi strukturnih sprememb v zdravstvenem turizmu, in tako posledično vzdržujejo potrebo po infrastrukturi in storitvah (turistična infrastruktura, lokalna dobava in zdravstvena oskrba). Vse do zdaj se priseljevanja ni razumelo kot strategije spopadanja s posledicami demografskih sprememb in prilagajanja nanje v hegemoničnih političnih diskurzih.





# THE EFFECTS OF LIFESTYLE MIGRATION OF JEWS FROM WESTERN COUNTRIES ON JERUSALEM

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## ABSTRACT

### **The Effects of Lifestyle Migration of Jews from Western Countries on Jerusalem**

Lifestyle migration has mainly been studied in the context of rural or coastal tourist destinations, less in cities. This case-study deals with the immigration of Jews from Western countries to Jerusalem, Israel's capital city. These immigrants generally enjoy a high socio-economic status, and are motivated by ideological and religious reasons. Moreover, these immigrants are highly desired by the State in their 'homecoming'. The article focuses on Baka, a neighbourhood in Jerusalem, where large communities of English- and French-speaking immigrants reside. This case-study contributes to the understanding of the effects lifestyle migration has on places, particularly gentrification, and expands our understanding of who lifestyle migrants are, what motivates them and how they live in their adopted countries.

KEY WORDS: lifestyle migration, gentrification, homecoming, Jerusalem, Israel

## IZVLEČEK

### **Učinki življenjsko-stilskih migracij Judov iz Zahodnih držav na Jeruzalem**

Življenjsko-stilske migracije so navadno proučevali v podeželskih ali obalnih turističnih destinacijah, manj pa v mestih. Pričujoča študija proučuje priseljevanje Judov iz Zahodnih držav v Jeruzalem, glavno mesto Izraela. Imigrante z večinoma visokim družbenoekonomskim statusom motivirata ideologija in vera, poleg tega pa so ti migranti ob »pripodu domov« s strani države močno zaželeni. Članek se osredotoča na jeruzalemsko četrt Baka, kjer prebivajo velike skupnosti angleško in francosko govorečih migrantov in prispeva k razumevanju učinkov, ki jih ima življenjsko-stilska migracija na kraje, predvsem na gentrifikacijo, širi pa tudi razumevanje o življenjsko-stilskih migrantih, njihovih motivih in načinu življenja v svojih privzetih državah.

KLJUČNE BESEDE: življenjsko-stilska migracija, gentrifikacija, prihod domov, Jeruzalem, Izrael

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## INTRODUCTION

One Saturday morning, in the spring of 2008, I was strolling up my street in the Baka neighbourhood in Jerusalem, dressed in trousers and a sleeveless shirt carrying a cup of coffee I had just bought. Several groups of people, coming from their Saturday morning prayers in the three synagogues that operate on this small street walked past me. The first were English-speaking and the second were French-speaking. They were all dressed in their finest clothes, women with head-covers, skirts and sleeves. I felt completely out of place and hurried inside my building.

At the time I had lived in Baka for three years, and it seemed to me that the neighbourhood was undergoing some change. As a secular native-Israeli I felt as an extinct minority, in Baka, and in Jerusalem as a whole. I wanted to understand the effects of migrants on the neighbourhood and made Baka the topic of my ethnographic research from 2008 to 2013.

Baka, located in the south-central part of Jerusalem, is small both in size and population: covering less than half a square kilometre with only an estimated 7,500 inhabitants. In the course of my fieldwork, I conducted 100 formal interviews, 41 of which were with Western immigrants, and had many informal conversations, with neighbourhood residents, community leaders, religious leaders, merchants, architects, realtors, representatives of absorption organisations, and political and civic activists. I conducted numerous participant observations – in synagogues, neighbourhood parks, streets, supermarkets, cafés, shops, schools, private homes and community institutions. I monitored newspapers articles on issues related to my research in national and local newspapers, as well as in the French and English media in Israel. I researched the municipality's archives and conducted online research that included content analysis of email correspondence, Facebook discussions and new immigrants' forums. I also studied the history of the neighbourhood since its establishment by wealthy Palestinians in late nineteenth century. This case-study aims to contribute to the understanding of the effects lifestyle migration has on cities, neighbourhoods and housing markets and to elaborate the understanding of who lifestyle migrants are, what motivates them and how they live in their destinations.

The Jewish Western immigrants in Baka can be regarded as privileged lifestyle migrants: they are immigrants by choice, often highly-skilled individuals, emigrating from economically and culturally powerful countries. They see themselves – and are seen by others – as performing a 'homecoming' when immigrating to Israel. They believe that in Israel they can lead a Jewish lifestyle and gain a sense of belonging to a larger collective entity. As these immigrants seek to improve their quality of life and not their standard of living, I prefer to speak of them as lifestyle migrants instead of using the commonly used ideological term '*Aliya*' (to ascend), which refers to Jewish immigration to Israel.

Lifestyle migration has mainly been researched in the context of rural or coastal tourist destinations (see Benson and O'Reilly's 2009 book and Janoschka and Haas 2013, for example) and less in the context of cities (Griffiths and Maile 2014, on Britons in Berlin, is an exception). The case study presented here deals with the State supported and highly encouraged immigration of Jews from Western countries, particularly the United States, France and Britain, to Jerusalem. As an urban case-study, it illuminates a somewhat blind spot of the lifestyle migration literature. This case-study is also unique in the sense that this is an ethnic (as well as ideological and religious) migration which is interconnected with class habits.

The Baka neighbourhood in Jerusalem has large numbers of English- and French-speaking immigrants, who moved there starting from the late 1960s as part of the neighbourhood's gentrification process. Indeed, in Baka lifestyle migration could be considered a form of gentrification. Now Baka has large and thriving ethnic communities of both English-speakers (identified here as 'Anglos', including American, British and other English-speakers) and French-speakers (identified as 'French', coming from France as well as other French-speaking countries). These ethno/cultural communities are formed by both veteran immigrants and newcomers who spend the majority of their everyday lives within the

boundaries of these communities. Significantly, their communities and lifestyle post-migration closely resemble the lives they left behind.

According to the Baka Community Council and Israel's 2008 Census, Western immigrants comprise about 25% of the neighbourhood's population (the French immigrants constitute about 10%, and the Anglos, 15%). If we include the second generation of immigrants, the numbers are larger and total 30–40% (for both populations) of all residents.

In this article, I shall address some of the main effects lifestyle migration has on its places of settlement. Western immigrants have impacted significantly on Baka as it gentrifies. Gentrification and changes in the housing market are also accompanied by other (related) effects, in the religious sphere (as these are mainly religious immigrants), educational institutions, the commercial sphere and modes of civic participation in neighbourhood affairs.

The next section, I discuss Jewish Western immigration to Jerusalem as both privileged lifestyle migration and 'homecoming'. In the following section, I will address the various effects that this lifestyle migration has on the Baka neighbourhood focusing on the housing market, and the religious and commercial spheres. Finally, I will further discuss my arguments and draw some conclusions.

## **LIFESTYLE/HOMECOMING IMMIGRANTS**

Israel is an ethnic immigration country, and the only criterion for migrant selection is Jewish ethnic origin (Joppke and Rosenhek 2003). The Law of Return (1950) established an open-door policy for Jews and extensive support benefits for immigrants. Moreover, encouraging Jewish immigration to Israel is a central goal for the State (Shuval 1998; Gal 2008). However, in recent years, the number of immigrants has declined. As the source of immigrants from the Former Soviet Union and Ethiopia decreased, the reservoir of potential immigrants consists of Jews from Western countries, not too keen on emigrating, and Israeli expatriates.

The Jews residing in Western countries are often quite successful in professional and economic terms. They also hold a cultural capital which is highly regarded in Israel. Now, most immigrants from the West are religious and Zionist (as opposed to the large numbers of non-Jews or Jews-under-question who immigrated to Israel from the FSU and Ethiopia). Their financial means enable many of them not to burden the State by claiming benefits (again, in opposition to other migrants), and they are perceived as contributing much to the State. Therefore, this population is greatly desired by Israel. Although one would not expect Israel to have a policy regarding highly-skilled migrants (Shpaizman 2013: 184), the State of Israel is actually willing, in various ways, to encourage highly-skilled Western migration. One such way is by giving free rein to private organisations engaged in encouraging immigration from Western countries (Shpaizman 2013). Another way includes financial incentives such as significant tax benefits. These measures have turned Israel into a tax haven for wealthy Jews.

When combined with various push-factors, such as tax reforms (in France for instance), economic crises or growing anti-Semitism, these measures further enhance the attraction of Diaspora Jews to Israel, and their wish to fully or partially immigrate to Israel or merely invest capital. Although privileged migration to Israel is not a new phenomenon, the policies that encourage such migration and facilitate investments by wealthy Jews are a new trend in Zionism. The State of Israel wishes to participate in, and capitalise on, the growing trend of the global upper-middle class to retire or spend significant periods of time elsewhere. Why should Jews invest their money in the Hamptons, coastal Spain or rural France and not in Israel? The Western Jews residing in Baka are more often permanent migrants or people whose centre of life is in Israel, even when making their living overseas. This, however, is not always the case. Indeed, for many Western Jews it is enough to feel deeply connected to Israel by owning property there, without necessarily being resident in it.

While immigration to Israel has been constantly dropping, the number of Western immigrants is actually increasing, and stands at several thousand per year. Immigration from France, in particular, has risen. In 2014, the number of French immigrants reached a new peak – almost 7,000 immigrants, and is expected to rise further in 2015, following the Muslim attacks on ‘Charlie Hebdo’ and the Jewish kosher supermarket in Paris (Hasson et al. 2015).

Jerusalem attracts more Western immigrants than any other city in Israel. In 2011, 34% of all American immigrants and 27% of French immigrants chose to settle in Jerusalem (CBS 2012), while 33% of British immigrants settled in Jerusalem in 2009 (CBS 2010). Many of them find their way to the Baka neighbourhood.

I examine Western immigrants as lifestyle migrants. Lifestyle migration is defined as the migration of ‘relatively affluent individuals of all ages, moving either part-time or full-time, to places that, for various reasons, signify for the migrant a better quality of life’ (Benson and O’Reilly 2009: 609–10). Lifestyle migrants are not driven by economic reasons: rather, many of them desire a more meaningful way of life (O’Reilly and Benson 2009: 4). They predominantly belong to wealthy societies in the West and they choose to relocate to places with lower costs of living, thus capitalising the multiple opportunities that the differences of purchase power and social and symbolic power relations facilitate (Janoschka and Haas 2013: 1–2).

Western immigrants to Israel can be considered lifestyle migrants as they are first and foremost immigrants by choice, motivated by the ‘pull factors’ of Israel more than anything else (Kay 2001; Amit and Riss 2007). Their motivation to immigrate usually stems from cultural imaginaries, national ideology and religion (Sheleg 2000; Cohen 2002, 2007; Amit and Riss 2007). These immigrants seek a better life religiously, nationally and culturally and hope to gain a sense of belonging. For this they are willing to reduce their material quality of life and face the challenges of immigration. However, their quest for a more meaningful way of life does not mean total lack of interest in maintaining, at least partly, the standard of living to which such immigrants have become accustomed, and this issue has significant spatial and cultural meanings, as shall be described shortly.

Western immigrants to Israel are not only lifestyle migrants but they are also performing a certain type of ‘homecoming’. Sociologists Edna Lomsky-Feder and Tamar Rapoport speak of the Jewish immigration to Israel as an ‘ethno-national homecoming’. They argue that this is a political-national return movement sponsored by the nation-state. This ‘return’ is based on the naturalisation of immigrants returning from exile to the historical homeland, the national home, in which their belonging to the national collective is based on common ethnic ties. They further claim that what distinguishes this ethno-national homecoming from other homecomings is the legal overlap between citizenship and nationality. The Israeli law grants rights to ethnic community members living outside the nation-state, often for many generations (Lomsky-Feder and Rapoport 2012: 2). Fran Markowitz and Anders Stefansson (2004) also refer to Jewish immigration to Israel as ‘homecoming’. They argue that these people uproot themselves from the only country they ever knew in order to settle in their people’s homeland (Markowitz and Stefansson 2004: 4). This ‘homecoming’ is therefore symbolic and imaginary in nature. Jews hold an image of Israel as their homeland based on biblical sources and practices of prayer. This image is so deeply rooted in Jewish religion and culture that it is not necessary to know Israel as a real place in order to imagine it as home.

Although Jewish immigrants are welcomed in Israel, once there, they often learn that their sense of belonging to their country of origin is stronger than they thought. They come to realise that social, religious, linguistic and cultural integration in Israel is not easy and that they are actually more ‘American’, ‘French’ or ‘British’ than they cared to admit. Western immigrants, therefore, willingly form their own enclaves or ‘bubbles’ (Zaban 2014), and are even encouraged to do so by absorption organisations. Since these are relatively powerful groups, when they settle somewhere, especially en masse, they influence this place and change it. Lifestyle migration of Western Jews and the formation of ‘expatriate’ communities also occurs in other Israeli cities like Tel Aviv, Netanya and Ashdod (all coastal

cities), where real estate became tied to second home and summer apartment purchases that impacts local populations. Jerusalem, however, attracts immigrants for its religious significance for the Jewish people, but no less significant, for social reasons having to do with the large communities of Western immigrants already residing there.

Several studies deal with the spatial and/or cultural effects lifestyle migration has on its places of settlement, on the relations between immigrants and locals and between immigrants and the authorities. Nadeem Karkabi (2013), for example, writes about Europeans in Sinai, Egypt, and their relationships with the local Bedouin population and with the Egyptian authorities. Michael Herzfeld (2009) writes about the effects of affluent external and internal migration on the Monti neighbourhood in Rome and its lower class residents, who are pushed out of their homes due to external demand. Michaela Benson (2013) and Michael Janoschka (2009) refer to the effects of North-American immigration on Panama and Costa Rica (respectively) in terms of the housing market and rising real estate prices, costs of everyday products, availability of imported food products in local supermarkets, traffic and parking issues and the relations between different social groups. Eva Jeppsson Grassman and Annika Taghizadeh Larsson (2013) refer to the flourishing Church of Sweden and the important roles it fills for Swedish immigrants and tourists across the globe, who were not frequent attenders of the church back home. As Michael Janoschka and Heiko Haas argue (2013: 6–7), there is a need for a more critical view of lifestyle migration, and its outcomes and implications for the places and communities in which it obtains. This is also the aim of this article.

## THE EFFECTS OF LIFESTYLE MIGRATION ON THE BAKA NEIGHBOURHOOD

Baka was established in the late nineteenth century by wealthy Palestinians who were forced out of the neighbourhood during the 1948 war. The abandoned Palestinian homes were declared 'absentee properties' and were soon populated by new Jewish immigrants, mainly lower class *Mizrahim* (Jews from Islamic countries), as well as by some government employees, military veterans and evacuees from the Jewish neighbourhoods damaged in the war. The spacious houses were divided into small units and became densely populated. The rough living conditions soon turned Baka into a poor, crime-infested neighbourhood. The 1967 war was a turning point for Baka as the new city borders turned it from a peripheral to an inner-city neighbourhood. Moreover, a new architectural trend saw value imbued in all that can be termed historic, authentic or 'with character' (Nitzan-Shiftan 2005) and middle class Israelis were re-enchanted by Palestinian homes. Later on, as the demand for Baka properties grew, new buildings sprung up, and even the poorly built housing developments of the 1960s were gentrified. From the 1990s Baka was already considered a prestigious neighbourhood.

While the gentrification process of Baka was initially dominated by native-Israelis, it always included immigrants from Western countries. As early as the 1980s, these immigrants constituted 30% of the neighbourhood's gentrifiers (Cohen 1985). The 1967 war, and particularly the occupation of East Jerusalem and the West Bank, sparked the imagination of Western Diaspora Jews and caused them to identify with Israel and adopt a Zionist worldview. Those who immigrated to Israel then were mostly young, single, educated and not particularly wealthy. They shared a strong Jewish identity and came from secular, traditional, non-Orthodox or Orthodox backgrounds (Avruch 1981; Dashefsky and Lazewitz 1983: 266). While at first the main attraction to Baka was its housing options, Western immigrants are currently drawn to Baka because of its reputation as a good and central neighbourhood with large communities of both Anglos and French. The neighbourhood synagogues established by Western immigrants are another point of attraction, as are the schools, good services, heterogeneous population and community atmosphere.

The high demand for residence in Baka caused an increase in housing prices. At the same time, the profile of Western immigration to Israel changed and now includes mainly religious Orthodox people

and a higher percent of families and retirees. Many wealthy religious families who can afford Baka's prices end up there. The dominance of this population from the late 1990s onward caused a shift in Baka's gentrification process – from gentrification to super-gentrification (Lees 2000), when the upper class pushes out the middle class preceding it.

While the gentrification of Baka started from below, it was supported by government policy to sell the abandoned properties to tenants, thus creating a niche for gentrification to develop. Moreover, while gentrification is seemingly a free market process, in reality it is not open for all. Rather, it is available only to hegemonic and affluent populations. The State's support for Western immigration encourages these immigrants to acquire properties in Israel through various tax benefits. The fact that they have stronger foreign currencies further facilitates their ability to purchase prime real estate in Israel. The market, on its part, quickly identifies demands and offers responses.

The long gentrification process, combined all along with lifestyle migration, introduced several aspects of change in Baka that need to be looked at as a whole. The various changes – in real estate, religiosity, consumption, education and civic participation – developed along the lines of the gentrification process but were also mechanisms in the deepening and expansion of this process.

## The housing market

Israel is currently experiencing a deep housing crisis, reflected in lack of housing units and ever-rising prices. Jerusalem's unique characteristics make its housing market even more problematic: political issues, lack of available land, long processes of acquiring building permits and social divisions in the city that create high demands for particular neighbourhoods by particular communities. Thus, properties in Jerusalem are among the fastest in the country to sell and prices keep climbing despite being one of the poorest cities in Israel.

During the 1990s, there was a growing interest from wealthy Western Jews in real estate in Jerusalem. This interest further intensified after 2003, when the Second Intifada was suppressed. Local realtors and architects realised which way the wind was blowing and started to build, plan and sell to these homebuyers. They knew what would sell best: Palestinian style architecture, either original or replicated in style. The interiors, however, were designed to accommodate the lifestyle needs of a modern – usually religious – Jewish family.

The trend of 'authenticity' combined with high-end modern comforts is demonstrated in the words of an architect who mainly works with wealthy Anglo clients both in Baka and outside it:

In recent years, since the end of the Intifada and the global economic boom, Diaspora Jews are looking for a grip in Jerusalem, which holds religious and cultural significance for them. Many of them are professionals who made a lot of money abroad and see their future, especially after retirement, in Israel. They want to build additions or new buildings that maintain the old 'Jerusalem style', because for them it is exotic, authentic and very different from what they have there. The architectural language of arches, traditionally carved Jerusalem stone, thin metal profiles and vaults, symbolises Jerusalem to them. Inside, they want all the modern conveniences, and they have the money for it. They want smart homes, underfloor heating, climate control systems, large electric accessories like refrigerators and ovens, in standards to which they are accustomed to from the United States, and dining rooms where they can host thirty people for a Shabbat meal.

The imagining of an 'authentic' Jerusalem is problematic. How authentic is a former Palestinian neighbourhood without its previous inhabitants? What is authentic about a one level house transformed into a three-floor totally renovated building, or the architectural duplication of Palestinian styled homes? Such authenticity, it seems, is only superficial. While the preservation of the outdoor stone mouldings is required, the inside of the house can be utterly changed: the floor is dug, staircases are added, ceilings

are removed and interior walls are torn-down. It seems paradoxical that to be truly at home in the Land of Israel, the interior of the home has to resemble Paris/New York/London as much as possible. There is an inherent contradiction between being drawn to the idealised place which then must be remade in the image of a home left behind.

'Authenticity' and the issue of preservation therefore clearly have their limits. In her thesis about the Yemin Moshe neighbourhood of Jerusalem, Tamar Zandberg (2008) touched upon similar questions and showed how preservation can be used as a discursive tool for what is actually the transformation of a place into a gentrified luxury neighbourhood. Ashworth and Tunbridge (2000) also ask what is authentic in houses and monuments that are so thoroughly restored, re-built, relocated, added to or utterly changed inside.

The demand to raise building standards (and hence, their costs) results in the creation of two real estate markets: one for Israelis and one for Western immigrants and foreigners. In inner-city neighbourhoods, such as Baka, where there are both high demand and high land value, new buildings and additions to old buildings are designed at the latter population. The steep rise in real estate prices slowly excludes the less fortunate population, usually everyone who earns their living in shekels rather than foreign currencies, Israeli-born or veteran immigrants alike. The issue of where those who are pushed out go is also worth mentioning. People usually move to less central neighbourhoods where housing is cheaper and where new housing units are found, or to the suburbs. In Jerusalem this trend bears political ramifications, as many of the peripheral neighbourhoods are built on annexed Palestinian lands, while many of Jerusalem's suburbs are in the Occupied Territories.

The fact that the inner-city real estate market, is designated and marketed to Western Jewish homebuyers is a constant cause for complaints and struggles by residents who wish to preserve the heterogeneous character of the neighbourhood. At a public assembly of neighbourhood residents in March 2010, the crowd of 120 people was heavily dominated by Israeli gentrifiers and veteran Anglo-immigrants. The attending residents clearly stated that they wished the neighbourhood's population to remain heterogeneous, with many young families. They wanted affordable housing and resented the building of luxury apartments and the phenomenon of 'ghost homes', triggered by lifestyle migration. At the same time, they also opposed the construction of buildings higher than three or four-floors. The solution the planners proposed was to keep the historic parts of the neighbourhood low-built while building higher on the outskirts, mainly on top or instead of the housing developments of the 1960s. This scheme is expected to enhance gentrification and super-gentrification. The regeneration schemes would remove low and mid-range apartments from the housing market, to be replaced by better quality and more expensive units, while more luxury apartments would be built on top of historic buildings. This is likely to encourage low and middle class residents to leave, while more affluent newcomers, particularly Western immigrants, are likely to move in. These processes are also expected to further homogenise Baka's population both socio-economically and ethnically.

## The religious sphere

Housing preferences and gentrification can also be influenced by religion, as argued by James Bielo (2011), who wrote about how young evangelicals' return to the city contributed to the gentrification processes. Baka is a fine example. The real estate ads in the French-speakers weekly *Le P'tit Hebdo* often state 'Proche Emouna'. *Emouna Chelema Biryushalaim* (True belief in Jerusalem) is the first and largest Francophone religious community to be built in Baka. It was established in the mid-1990s by French Jews of North African origin. As Orthodox Jews do not drive on Shabbat, living in close proximity to their synagogue is important, and therefore impacts the surrounding housing market.

The French community of Baka is mainly formed around synagogues. There are two large synagogues established by French immigrants, three small ones and several others where the French community is

dominant. These are all Sephardic synagogues, as the majority of French immigrants originate in North Africa. The French synagogues function as community centres, where people meet, demonstrate their social and/or economic status through religious piety and activism and participate in cultural and religious events. Another arena for cultural life is private homes, where lectures, classes, concerts or book clubs are conducted. The French immigrants are mainly interested in the communal life offered by their religious communities, and rarely participate in activities organised by the Baka Community Centre.

Baka's French immigrants and their synagogues are usually traditionally Orthodox. It is a religiously conservative community and is usually quite right wing in its political views. I base this generalisation on my informants' comments, as well as from the events and lessons taking place at French synagogues and other venues, their Rabbis' statements and the French-speaking media. Yet, in Baka there is a smaller group which present an exception to this rule. They are usually more veteran immigrants, often (although not always) Ashkenazi French who are more liberal in both their religious and political views, more active on the neighbourhood level and can more often be found in the Anglo synagogues. This reflects some changes in the immigration from France to Israel. The first to arrive, in the late 1960s and 1970s, were Ashkenazi (the North African French were at that point still only settling in France) and were often not very religious, but these French Jews are now less keen on immigrating to Israel, and particularly to Jerusalem. The North African Jews became increasingly religious in France and their links with Israel intensified. Their Jewish appearance and lifestyle and their vicinity to North African Muslim immigrants have perhaps also made them more vulnerable to anti-Semitic attacks. For these reasons, this is currently the dominant profile of the French Jews immigrating to Israel.

The English-speaking migrants in Baka, usually American or British, are quite different. In their case there are also differences between earlier and later waves of immigration, as mentioned. While the immigrants of the 1960s and 1970s held liberal values, and often came from the non-Orthodox streams of Judaism, newcomers are usually Orthodox (although modern-Orthodox) and less leftist in their political views. Jews from non-Orthodox streams rarely immigrate to Israel today and even less so to Jerusalem, due to their growing ideological distance from Israel (Cohen and Kelman 2010).

The profiles of Western immigrants are closely related to Baka's gentrification process. The pioneer immigrants who settled in the neighbourhood and took part in its early stage gentrification were young English-speaking liberal college graduates, familiar with gentrification from their home cities. They established religious communities which were considered progressive in Israel's 1980s religious arena. One such community was *Yedidya*, a Modern-Orthodox community, highly egalitarian for its time, and another was *Kol HaNeshama*, a Reform community. In fact, the Americans introduced Israel to a liberal, pluralistic form of Judaism. Reform and Conservative Judaism only started in Israel following American immigration (Tabory and Lazerwitz 1983), as did Modern-Orthodoxy (Sheleg 2000) and religious feminism (El-Or 2002: 294–6). These communities were also unique for being religious communities and not merely houses of prayer. They aimed to become community centres with multiple functions. While this is the common model of synagogues in Europe and America, where Jews are a religious and ethnic minority, it is not the case for Israel, where people belong to larger communities.

During the 1990s Baka became a prestigious neighbourhood and super-gentrification started at full force. While the housing prices in Baka certainly determined who lived there, it was also linked with general trends in American and British Jewish immigration to Israel. While *Yedidya* is still a major source of attraction for new immigrants in Baka, the changing profile of immigrants calls for adjustments – often opposed by those who established the religious congregation – such as involving less politics in services and other activities and halting advancements in gender egalitarianism. Many Anglo newcomers are more attracted to Baka's traditional Orthodox Ashkenazi synagogues, where Anglos have become dominant. *Yedidya*, *Kol HaNeshama* and other religious communities in Baka's geographical vicinity have greatly influenced the religious arena in this part of Jerusalem, both in their Western models of religious community, as well as their feminist values. While both these communities



are well-established, there are now many newer and more experimental communities that have been influenced by them.

## The commercial sphere

The commercial sphere is one of the hallmarks of gentrification. It is the most visible sign of it occurring alongside changes in the housing market (Glass 1964; Zukin 2010). Developments in the commercial sphere of a gentrified neighbourhood reflect fairly accurately the current stage of the process at any given moment.

Baka is built around a High Street where commerce has existed since the neighbourhood's establishment. The gentrification process clearly introduced many commercial changes. While essential businesses like grocery stores, butcher shops or green grocers continued to exist, new businesses opened with offers other than daily necessities – gift shops and patisseries, for example. Later on – cafés, dry cleaners, ironing services, delicatessens, designer clothes and chic hairstylists opened. Veteran businesses constantly updated themselves to respond to clients' needs. The impact of Baka's Western lifestyle migrants on the commercial sphere was very apparent.

This impact partially results from immigrants' initiatives. Such is the case for a variety of businesses and services designed to meet a need arising in the community: telecommunication services, English/French speaking kindergartens or service providers who are members of the community and therefore appear reliable and easy to communicate with. Their advertisements reveal these perceptions and define their marketing strategies (such is the case for 'the British plumber' or 'the American handyman').

The impact of Western lifestyle migration on the commercial sphere are also driven by the demand of local market forces. One business whose target population is Western (female and religious) immigrants – is a women-only gym and spa. It offers personal trainers, training in Hebrew and English and a multi-lingual staff. Other cases are an online delivery service servicing the wealthy Anglo community; realtors and asset management personnel who specialise in Anglo/French clientele; foreign language bookstores; cafés and restaurants aimed at Western immigrants' tastes; and a variety of imported products sold in local grocery stores and supermarkets. Many products are imported to Israel by immigrants, but once there, also appeal to local crowds and influence consumerist norms and preferences.

Both types of changes, those initiated by immigrants and those generated in response to them, profoundly influence space and the social and cultural trends that take place in Baka. The fact that people can sustain much of their former lifestyle post-immigration – be it sipping their cappuccino in a Parisian style café or finding their favourite brand of cereals in the local supermarket – enables immigrants to gain a sense of belonging and attachment to place. Yet, they remain within their 'bubbles', distanced from native-Israeli society. As a male interviewee who emigrated from New Hampshire in 1996 told me:

Baka is one of the sole neighbourhoods where Americans can have a quality of life they are comfortable with. Some people come here with a serious job, with money, with high standards, with openness to the world. Baka might be the most Western, open and global neighbourhood in the country. They can live in Israel, be Israeli and raise their family in an Israeli environment but at the same time go on with their American life.

How exactly are Americans living in a transnational enclave 'open to the world'? It seems that they are actually trying to make the 'world', in this case Israel, more American or more French, in the case of the French community whose enclave patterns are similar. However, the manner in which Baka culturally adjusts to Western immigrants' needs has more to do with the immigrants themselves. Israeli society as a whole is undergoing fast processes of globalisation and Americanisation. In a place heavily dominated by Western populations, such processes are even more striking and accelerated.

Edward Relph argues that the desire to belong to a place and participate in its traditions can fuel attempts at systematic exclusion of all those who are believed not to belong (Relph 1997: 208). The issue of exclusion raises the question whose neighbourhood is it? Many businesses in Baka identify their target customers. They modify themselves to the status and tastes of consumers and to the potential profit inherent in the place. The attempt to attract potential customers reflects how businesses perceive the neighbourhood's population and identify its people and their lifestyles. Not only do businesses reflect which population they identify as the most profitable, but by doing so, they also contribute to the identification of that population as the owners of the physical space. It both reflects the current composition of the neighbourhood's population and shapes future social composition. When Western immigrants recognise Baka as a place that caters to their needs, it increases their belonging. The local native-Israelis, on their part often express their feeling of being 'under conquest' by Western immigrants and resent them for pushing them out, economically and culturally. When these Israelis sense that a business attracts too many Anglos or French, they may feel out of place there and be put off by it. When *Kalo*, the most veteran café in Baka recently closed for refurbishments, I heard local Israelis telling the owner – 'Don't make it too American'.

## CONCLUSION

In this article I aimed to show the relationship between the Israeli State's encouragement of the immigration of Jewish populations and the impact such immigration has on place, in this case the Baka neighbourhood and the city of Jerusalem as a whole. By doing so I aimed to bring together two substantial fields of research: lifestyle migration and gentrification.

Baka is a case-study for a neighbourhood undergoing long processes of gentrification combined with high-status immigration of Western Jews. In fact, lifestyle migration can be considered in this case a form of gentrification. By looking at different material and cultural aspects of life in Baka – the housing market, the religious sphere and the commercial sphere – I aimed to demonstrate the impact of lifestyle migration.

By addressing high-status 'Aliya' from Western countries as lifestyle migration, I attempted to argue that such immigration to Israel should be seen outside the ideological framework and in the context of current trends in migration practices and studies. I also argued that this case-study can contribute to the scholastic understanding regarding who lifestyle migrants are. The role of imagination in mobilising people to immigrate is another important issue addressed here. Western Diaspora Jews imagine Israel as their homeland and Jerusalem as the holy capital of this homeland. They are searching for a Jewish lifestyle, community life and a sense of belonging to larger collective entities.

Yet, once in Israel, migrants wish to continue their lives as before, among their compatriots. They try to preserve much of their former lifestyles in terms of religious, social, living arrangements and consumerist practices. The power of class habits and class practices can therefore not be underrated. By maintaining a familiar lifestyle for themselves, these migrants often effect changes in the lifestyles of others.

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## POVZETEK

### UČINKI ŽIVLJENJSKO-STILSKIH MIGRACIJ JUDOV IZ ZAHODNIH DRŽAV NA JERUZALEM

Hila ZABAN

Življenjsko-stilske migracije so navadno proučevali v podeželskih ali obalnih turističnih destinacijah, manj pa v mestih. Pričujoča študija raziskuje priseljevanje Judov iz zahodnih držav v glavno izraelsko mesto Jeruzalem. Te imigrante po lastni izbiri, ki imajo po večini visok družbenoekonomski status, za migracijo motivirata ideologija in vera. V svojih očeh – pa tudi v očeh drugih – z imigracijo v Izrael »prihajajo domov«. Verjamejo, da lahko v Izraelu živijo judovski življenjski slog in doživijo občutek pripadnosti večji kolektivni entiteti. Teh imigrantov so ob njihovem »pripodu domov« razveseli tudi izraelska država.

Iz tega, da je visoko cenjena *aliya* (splošno uporabljani izraz za opisovanje judovske imigracije v Izrael, ki dobesedno pomeni 'vzpeti se') iz zahodnih držav opisana kot življenjsko-stilska migracija, izhaja, da bi bilo treba imigracijo v Izrael razumeti zunaj ideološkega okvira in v kontekstu trenutnih trendov v migrantskih praksah in raziskavah. Avtorica študije je prepričana, da lahko z njo prispeva k akademskemu razumevanju življenjsko-stilskih migrantov. V prispevku obravnava še eno pomembno vprašanje, to je vlogo predstav pri mobilizaciji ljudi, da imigrirajo. Judje iz zahodne diaspore si predstavljajo, da je Izrael njihova domovina, Jeruzalem pa njena sveta prestolnica. Članek se osredotoča na sosesko Baka v Jeruzalemu, kjer živijo velike skupnosti angleško in francosko govorečih imigrantov. V Izraelu si migranti želijo živeti, tako kot prej, med sodržavljeni. Glede verskih, družbenih, bivalnih in potrošniških praks si v glavnem želijo ohraniti svoj prejšnji življenjski slog, zato se ne sme podcenjevati moči razrednih navad in praks. Z ohranjanjem svojega znanega življenjskega sloga pa pogosto spreminjajo življenjski slog drugih.

Pričujoča študija primera pomaga razumeti učinke življenjsko-stilskih migracij na kraj naselitve, še zlasti na gentrifikacijo, in širi razumevanje življenjsko-stilskih migrantov, njihovih motivacij in načina življenja v izbranih destinacijah. Natančneje, članek se ukvarja z učinki, ki jih ima migracija na sosesko Baka in se osredotoča na različne materialne in kulturne vidike tamkajšnjega življenja – na trg nepremičnin ter versko in komercialno sfero. Prikazuje razmerje med spodbudo izraelske države judovskim prebivalcem, naj imigrirajo, in učinki teh migracij na kraj priseljevanja. Tako poveže dve obsežni raziskovalni področji: življenjsko-stilske migracije in gentrifikacijo.



# “SAIL AWAY”: THE BIOGRAPHICAL APPROACH AS A TOOL TO UNDERSTAND THE CONCEPT OF TEMPORARILY UNBELONGING

Nataša ROGELJA<sup>1</sup>

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## ABSTRACT

### “Sail Away”: The Biographical Approach as a Tool to Understand the Concept of Temporarily Unbelonging

The paper explores the connection between the sea, sea imaginaries and lifestyle migration. Through the use of qualitative longitudinal research, specifically the biographical approach, it discusses in what way sea imaginaries are the inspiration for lifestyle migrants and how they are translated into practice *in situ*. It introduces the idea of *unbelonging* developed by Rogoff (2000) in relation with migrants' experiences. In the first part I discuss the sea as a physical place and as a significant symbol for my interlocutors in relation to the ideas of liminality and temporarily unbelonging. In the next part I put forward two representative (family) portraits in order to highlight details from individuals' lives on a longer time perspective, while in the final part of this article I place the individual stories, sea imaginaries and people's experiences with the maritime environment in dialogue with each other. This makes it possible to better understand the expectations, aspirations and experiences of my interlocutors and to discuss further the idea of temporarily unbelonging in practice.

KEYWORDS: the sea, biographical approach, lifestyle migration, Mediterranean, temporarily unbelonging

## IZVLEČEK

### »Odjadraj«: biografski pristop kot orodje za razumevanje koncepta začasnega nepripadanja

Članek raziskuje povezavo med morjem, imaginariji morja in življenjsko-stilskimi migracijami. Z uporabo longitudinalnega kvalitativnega raziskovanja, zlasti biografskega pristopa, prikazuje, na kakšen način so imaginariji morja navdih za življenjsko-stilske migrante in kako se *in situ* prevajajo v prakso. Predstavi idejo nepripadanja, ki jo je na izkušnjah migrantov razvila Rogoff (2000). V prvem delu razpravlja o morju kot fizičnem prostoru in za sogovornike pomembnem simbolu, povezanem z idejami o liminalnosti in začasnem nepripadanju. Za osvetlitev podrobnosti iz življenj posameznikov v daljšem časovnem obdobju v naslednjem poglavju predstavlja dva reprezentativna (družinska) portreta, v zadnjem delu članka pa individualne zgodbe, imaginarije morja in izkušnje sogovornikov postavi v dialog. Vse to omogoča boljše razumevanje pričakovanj, prizadevanj in izkušenj sogovornikov in poglobljalno razpravo o začasnem nepripadanju v praksi.

KLJUČNE BESEDE: morje, biografski pristop, življenjsko-stilske migracije, Sredozemlje, začasno nepripadanje

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## INTRODUCTION

The online advertisement for the book *Sail Away: How to Escape the Rat Race and Live the Dream* by Nicola Rodriguez states: "There's never been a better time to buy a boat and sail away. Western economies are on the brink of collapse and a decent return on investments is hard to find – so why not cast off on the adventure of a lifetime?" (<http://www.sailawaybook.com/>). A quick browse on the Internet produces numerous results linking to poems, books, personal blogs, charter or tourist agencies, all using the phrase "sail away". The "sail away" idea can be broadly contextualised with the myth of departure that has been widely celebrated in the popular discourse of the 20<sup>th</sup> and 21<sup>st</sup> centuries, particularly among the middle classes. The idea of escaping to the good life has been extensively discussed in the edited volume *Lifestyle Migration. Expectations, Aspirations and Experiences* by Benson and O'Reilly (2009). Following their observations, the search for a better way of life reflects the wider lifestyle choices that individuals in the post-modern world make on a daily basis, while the recent increase in this phenomenon implies that it emerges partly as a result of the reflexive assessment of opportunities that Giddens (1994) identified as only recently having been made possible, rather than a direct outcome of relative economic privilege (Benson and O'Reilly 2009). There are various social changes such as globalisation, individualization, flexible work opportunities (Amit 2007), and ease of mobility (Urry 2004, Sheller and Urry 2006, Sheller 2011), which have enabled the appearance of privileged forms of mobility such as lifestyle migration. Regarding the liveaboard lifestyle migrants in the Mediterranean, several specific reasons can be listed: the opening of internal borders within the EU, rapid development of affordable navigation technology, rapid expansion of boat charter industries that have popularized the pleasure of cruising, as well as several recent socio-political contexts within Europe which vary from increased standards of living to recession and disillusionment with dominant nation-state system norms of society marked by global capitalism (D'Andrea 2006, 2007; Juntunen, Kalčić, Rogelja 2014).

Discussing lifestyle migration, Benson and O'Reilly wrote that, "...the material and social construction of particular places offering an alternative way of living is crucial; this is what explains the exact destinations chosen, revealing the role of imagination, myth and landscape within the decision to migrate" (2009). Following these ideas, I pay special attention to the importance of socially transmitted representations of the sea, sailing and sea voyages in the first part of the article. Apart from these representations, I claim that a consideration of the physical environment and matter, namely the sea, as well as events following the post-migration period, are of special importance to fully understand the experiences of my interlocutors and to reflect on the concept of liminality as it was previously tailored to the lifestyle migration literature (Korpela 2009, Benson 2011, Hoey 2009 and others) and initially introduced by Van Gennep (1960 [1909]) and Turner (1967). In the next part, I put forward two representative (family) portraits in order to highlight details from individuals' lives. Using a biographical approach, I will discuss the process by which sea imaginaries are the inspiration for lifestyle migrants and how they are translated into practice. The growing interest in the potential of qualitative longitudinal research within the field of lifestyle migration is mainly connected to the fact that such an approach reveals the processual nature of migration, as it reflects on the interplay between structural and individual factors. The contemporary model of qualitative longitudinal research, also used in this research, centres on the repeat interview study, long-term ethnography and follow-ups or re-studies of classic research projects (Thomson 2007, see also Holland *et al.*, 2004 for an overview). As stated by Thomson, the general resurgence of interest in qualitative longitudinal methodologies is associated with an interest in processes while "...[one of] the most compelling attractions of this kind of work is that it enables us to explore apparent discordance between what people say and what they do in such a way to escape some of the traditional constraints of qualitative research" (2007: 572). I claim that a biographical approach reflects on the idea of the processual nature of my interlocutors' experiences; it reveals their experiences in the period after the act of migration, while also allowing for the demonstration of an attempt to temporarily inhabit the gap between systems, ports and possibilities. As I argue in the conclusion, the task becomes



not to change the structure but to inhabit it differently. I link this attempt with the idea of *unbelonging* – a critical refusal of the terms, developed by Irit Rogoff (2000) in her book *Terra Infirma*. In the final part of this article I place the individual stories, sea imaginaries, and people's experience of living on a boat in a dialogue, in order to better understand the expectations, aspirations and experiences of my interlocutors and to discuss further the idea of temporarily unbelonging in practice. Following Irit Rogoff (2010), Emma Cocker used the phrase 'temporarily unbelonging' to describe an art experiment of illegal border crossings aiming to actively create a productive gap into which other ways of operating can be called or conjured (2014: 60). In a similar way, I will show that my interlocutors' decision to migrate, to temporarily unbelong, has opened up avenues for their possible future "journeys".

## LIFESTYLE MIGRATION AT SEA

Places are not merely the physical surface and substance but are deeply interconnected with the images imposed on them. Similarly, human mobilities are intertwined with cultural meanings. As stated by Salazar: "Studying the interaction between culturally rooted imaginaries of mobility and real physical movements, a relation coloured by global media images as well as personal accounts, helps us understand the multiple meanings behind contemporary migratory phenomena" (2010: 53). The sea as a specific cultural image is connected to both – to the physical place and to the journey, and as such it has a specific position within the map of "meaningful places" important to lifestyle migrants. In the subchapter entitled *Geographies of Meaning* within the collection of studies called *Lifestyle Migration – Expectations, Aspirations and Experiences*, editors Michaela Benson and Karen O'Reilly write about the importance of specific geographic places holding certain meanings for the migrants in terms of their potential self-realisation:

Lifestyle migrants seek literal and figurative places of asylum or rebirth [...]. These representations of the destinations chosen were drawn from both personal experiences of the places through prior tourism and travel, but they also derived from wider cultural narratives. They can be categorised under three main headings: the rural idyll, the coastal retreat and the cultural/spiritual attraction (2009: 6).

Although the sea partially fits into all three proposed frameworks, it could also be listed as a separate sub-field, stimulating lifestyle migrants with its own culturally specific meanings derived from a long history of colonialism and politically imposed ideas about the "sea of freedom" evident for example in the treatise *Mare Liberum* (1680) by Hugo de Grotius. These can also be found in the Romantic landscape of poets such as Byron, Keats, Wordsworth, or Coleridge, Romantic poets who were also passionate sailors; they wrote about the sea and the sea soaked them in turn. In the context of this intimate relationship between sea and man, small boat sailors and their writings had a special place in sea-symbolism throughout the 19th and 20th centuries (Slocum 2004 [1900], Moitessier 1960, 1967, 1971). Later, culturally specific meanings of the sea important for our debate can be traced in ideas of anti-consumerism and self-reliance as expressed in the writings of 20th century sailors who "sailed away" (such as the famous French sailor Bernard Moitessier from the period of the 1968 student protest, followed mostly by the younger French generation), but it can be also related to the global adventure landscape of the 21st century (see Corbin 1994 for an overview of the historical development of sea imaginaries in the Western world).<sup>1</sup>

<sup>1</sup> As French historian Alain Corbin observed, initial models of the sea in the Western world were connected with fear and horror (1994). Later, during the ages of Enlightenment and Romanticism, a different perception of the sea was brought forth with more idyllic images.

Discussing the sea as a physical place, sea imaginaries, as well as practice among my interlocutors undoubtedly leads to a reflection on the concept of liminality, initially introduced by Van Gennep (1960 [1909]) and Turner (1967).<sup>2</sup> Various researchers of lifestyle migration present liminality as an explanatory concept (or a concept with which they develop a critical discussion) while observing the ambivalence<sup>3</sup> of their interlocutors' everyday life. Some discuss the performance of liminality in migrants' lives (Bousious 2008), use liminality to refer to the destination (O'Reilly 2000), while others refer to the in-between state of liminality of their interlocutors in the context of mid-life crisis (Hoey 2009), or critically observe the difference between the term liminal and liminoid in relation to their case studies (Korpela 2009, Benson 2011). The term liminoid, introduced in 1982 by Victor Turner, refers not only to the in-between liminal state but to any position outside. The liminoid state is described by Turner as a transitional phase that individuals enter voluntarily; it is associated with leisure space and was adopted as a more suitable term than liminal by various researchers of lifestyle migration (Korpela 2009). Following Benson's observation however, the concept of the liminoid state cannot fully explain the migrants' experience of life after migration, as the model does not allow for the combination of work and leisure (2011: 68).

The (open) sea can certainly be connected with in-betweenness (the zone between one state and another) and with motion, as one hardly can stay still at sea. Islands, ports, and states function as fixed points while the sea is traversed. As Phelan observed, the seas are empty and full at the same time; full of routes, memories and symbols yet empty, hardly deserving to be called a place: "What is there for us at sea then? Nothing but a boat, one's body and endless waves..." (2007: 5). The sea is therefore on a practical level the space "between worlds", characterised by crossing, movement, connection, but also with hardship and separation. I observed how for my interlocutors the sea and the journey (and its liminal associations) are adopted for a self-project experiment in the context of *what if* questions: what if this is possible (to live on a boat), what if there is a better port, a better community... In the experiment of work-leisure-existence on the sea and on the boat, the liveboards are in a relatively privileged and active position of unbelonging; they temporarily stop (working, going to school or to church, even stop walking as they cross the seas) and critically observe themselves and the dominant structure. Nevertheless this position cannot be fully applied to the model of liminoid, as Turner specifically associates it with a leisure space that is (almost) passively experienced by individuals. As we will observe from the following biographic details in the next section, for the majority of my interlocutors this "experiment" is mostly temporary and difficult to sustain due to various reasons such as family obligations, children, school, personal crises, the difficulties of living on a boat, etc. Despite this, it has quite permanent effects on people's practical knowledge of "parallel paths" (of working, family relations, education...) that they might take and use in the future. Following this line of thought I found the idea of *unbelonging*, developed by Irit Rogoff (2000) useful to reflect on my interlocutors' experiences. In her book *Terra Infirma*, Rogoff writes about learning and transitional processes and how they are "... not so much the addition of information as they are the active processes of unlearning which need to be carefully plotted out into active theories of unlearning which can be translated into active positions of unbelonging" (2000: 3). Her theoretical discussion on *unbelonging* as an active process does not promote the illusion that the state (or any other structural constraint) is not powerful but rather aims "to examine some of the terms by which it has limited and shut down our capacity to understand and thematize issues of belonging beyond those annexed purely to the juridical status of its subjects" (ibid: 5). The movement of my interlocutors has to do with experimentation, curiosity, the constant making of choices; while temporarily unbelonging they acquired skills in adapting to new situations (the marine

2 Van Gennep related the concept of liminality to the transitory phase in rites of passage (to the middle phase between separation from the old position and incorporation into the new one), while Turner developed his ideas further concentrating on an in-between state of the liminal.

3 For more on the concept of ambivalence as an analytical framework for explaining post-migration subjectivities in relation to British lifestyle migrants in rural France see Benson 2011.

environment, new economic possibilities of work-leisure-existence at sea, family relations on the boat, etc.). This does not mean that they altered their previous social position or values, it simply means that they have acquired new skills and new perspectives; they inhabit the same structure differently. The sea and the boat are of particular importance on the practical level, because on a boat one preserves the "floating position" not only literally, but also in terms of social (un)belonging; my interlocutors are usually not entitled to formal migrants' rights nor are they fully entitled to the rights of their home country as many of them live nomadic lifestyles without a permanent address. In this process of learning and unlearning (by placing themselves in the state of temporarily unbelonging), a chain of signifiers and events is important for our debate and can be effectively observed through the use of a longitudinal qualitative method as we will see in the next section.

## UNDERSTANDING MIGRATION THROUGH BIOGRAPHIES

The research presented here was conducted in several locations: 1. Ionian Greece (Igoumenitsa and Lefkas areas); 2. the Gulf of Corinth and the Peloponnese; 3. Crete; 4. the Marmaris region (S Turkey); and 5. the island of Rhodes. The foundational data for this article was gathered through in-depth, open-ended interviews with people who were living part-time or full-time on sailboats in the last 10 years (with a few exceptions of those who lived on boats from around the 1970s on and belonged to the generation of the 1968 student revolutions). The ethnographic interviews emphasised personal backgrounds, reasons for their mobile lifestyle at sea, their relation to the sea, their travel itineraries and post-migration experiences, and were conducted with a total of 67 individuals. After the two-year-long fieldwork I maintained contact with 5 families through e-mail, following their blogs, or through direct visits. My involvement in this research was made up of two stages. In the first two years I was involved in this lifestyle as an insider: as an unemployed anthropologist I was doing precarious work as a freelance journalist while living and traveling on a boat, fulfilling my dream of spending time with my children while traveling. For the next two years, I was working on an anthropological project studying lifestyle migration of people that live and travel on sailboats, while also living on a boat myself. For the purposes of this article, I have chosen two portraits: of a German family and of a childless British couple in early retirement, so as to provide a broad range of information on post-migration experiences and events. The portraits are a combination of excerpts from my fieldwork diary and passages from interviews, and are deliberately written in an vivid, essayistic manner in order to bring the research closer to the reader.

### Portrait 1

It was in the beginning of nineties that Fritz made his decision. He left his well-paid job as a mechanical engineer, scraped together all his savings and bought a boat. He said he didn't want to be part of the German political system; he didn't want to be a part of an immoral morality; he didn't want to support a world in which he did not believe. So he resigned. "I never had empty pockets but I was never satisfied. Life is too short to be spent on designing elevators for business buildings. Let people walk ... Let people stop with immoral projects. To live and work in such [a] system is an ecological, social and moral disaster ...", he explains. He felt content with his risk-taking gesture and talked about it many times in our interviews.

He gains experience on the way. For four years, he circles between Western Africa, the Canary Islands and the Mediterranean. He works in the Mediterranean, he lives in Africa. Fritz earns his money by chartering, with occasional work in shipyards or building sites, exchanges his services for the services of others, he writes articles, works as a surveyor for boats. For Fritz, the sea is a constant struggle, it's a contagious virus, a place of freedom, a place where a man hardens himself, and throws overboard all

that is unnecessary and starts his life anew. In the third year of his new life, Fritz meets Ines. She came to Fritz's boat as a charter guest and stayed. She chose Fritz because he offered the cheapest charter in the Mediterranean. Ines wanted a change. In Germany she worked as a teacher in a kindergarten and she was thinking about change very often, maybe voluntary work in Africa, maybe a journey. Fritz showed up at the right moment. While on the Canary Islands, Fritz and Ines sell their plastic sailboat and buy a hundred year old wooden brig, once a fishing boat in the Northern seas; for a charter, for educational courses, as a home. "Wood is a good material ... wood does not harm Mother Nature...", Fritz often explains to me. In the warm shelter of the Canaries, they start to renovate the boat. They treat the wood, paint, cut, they glue. Their first son Nur watches them patiently from his baby chair.

Fritz and Ines dream of sailing around the world, they dream about publishing a book, about how they will conduct educational courses for youth about the sea, about ecology ... They often point out how healthy they feel, how good it is to live out in the fresh air, how they started to sleep outside on the deck in summer. Sometimes they dream of an ecological house, of a piece of land, where they could be self-sustainable. Maybe someday, but the journey comes first. Fritz and Ines have friends that are producing their own food: they also lived on a boat, they were also German. The father had serious heart problems; the mother was a social worker. Employers avoided the sickly father; the mother did not earn enough money. Just as Fritz, they said they also started making decisions. They sold their car and everything else they had, they put all their savings together and bought an old boat for 10,000 Euro. For several years they lived on that boat in Greece, receiving state benefits. Then, a few years ago they sailed with their three children to Sweden. They leased a piece of land and started to produce their own organic food. They live there with two other families. Fritz and Ines say they may join them one day.

Since Nur turned one, Fritz and Ines have lived in the Mediterranean. They explain: "the Mediterranean is comfortable for children ... in the Mediterranean one earns better money, but the Mediterranean is also expensive for living ... in the Mediterranean there are too many tourist boats ... in the Mediterranean, people like us are not welcomed ...". Especially in the Western Mediterranean, they explained. That is why Fritz and Ines move slowly towards the east. They have a new plan. They will stay in the Eastern Mediterranean for a year or two to earn some more money, Nur will grow up, and afterwards they will go across the Red Sea to Madagascar. But plans keep changing. Fritz feels the pressure from his family and friends. Why doesn't he just stick to the plan? Why must he always change plans? "Because I am the master of my life", he answers angrily. When it all gets too much, Ines goes back to Germany and works in a kindergarten. They kept an apartment there, their permanent address. In the meantime, Fritz fixes the boat.

Nur turns school age. Ines educates him on the boat and does the rounds. She circulates between parents, exams in school and between old friends and new plans. School complicates life. In the meantime, Fritz anchors himself at the pier of a particular Greek village where a lot of Germans live. Because of that, life here is easier. Once a month, a private German truck comes to the Igoumenitsa region bringing things people ordered from the home-country, mostly special food. Fritz also feels strange in the German community, he understands the German community but he feels he is not a part of it. Nevertheless he chooses the village, along with many other liveaboards, but just during the winter – in the Mediterranean, weather determines life on the boat. Once, on their way from Italy to Greece, they got caught in a storm. 25 hours of fighting the sea. They were scared. Fritz didn't follow online weather forecasts and it was late autumn. "Did the old sailors have Internet weather forecasts?!", he angrily says.

One spring, Nur is joined by a little brother, Hugo. Ines decides to give birth in Germany. She trusts the German maternity hospitals more, the doctors speak her language, her mother is close by. With scarcely two months, Hugo is looking around the boat from his baby chair. Fritz is grinding, cutting, nailing and gluing. The boat starts to leak, the engine brakes, new expenses appear out of nowhere and then more expenses on top of those. Fritz becomes anxious. Hugo, the school, the money, the boat... Why do things not run smoothly? Why does he have to pay Germany if he wants to home-school his children? Why do they put pressure on him? Why doesn't Ines help him more? Ines decides. She will

leave Fritz. He is inconsiderate, he doesn't know how to behave, he does not understand, she has many obligations because of the two boys, he doesn't support Nur enough. She will go back to Germany. She distributes Nur's toys among the children of the pier, she gives his flippers to a girl passing by, she gives the mask to the boy from the boat next to theirs. She will talk to Fritz for the last time. The children are waiting, the parents are talking. One hour passes, then two hours ... The children wait. Ines shows up; she is not going to Germany. Not this time anyway.

Hugo was two years when Ines received the message. It's her mother, she's had a heart attack. With her children, Ines returns to Germany, while Fritz stays on the boat. He comes occasionally to Germany and feels lost. All these machines at the bus station, he doesn't have a job, so he continues his work in charter tourism in Greece. Nur starts to attend school but Ines can enrol him only in the bad schools. Her official income determines it. So Nur goes to the bad school. He doesn't like it there, he doesn't like computer games, he doesn't like the rude boys. When summer comes, they finally go back to the boat. The family is together again, the world is beautiful, the sea is blue, they feel healthy and happy. The stars are there above them; what they most miss in the city are stars, the feeling of health and strength and the fresh air. One day, they will sail across the Red Sea towards Madagascar. But not yet. They must help Ines's father. Who will help him if not his daughter?

## Portrait 2

Ann and Dave met in the early 1970s. They shared the passion for travelling, for adventures, for motorcycling, changes and motion. Ann worked as a nurse and Dave was teaching physics in a comprehensive. They lived in Wales. Work wasn't the centre of life. At the end of the seventies they take the decision and they set off. They buy a 21-foot long sailing boat, they quit their jobs, say goodbye to their friends and leave. Their friends admire them, they are brave, they are special, to leave feels so good, so victorious, they explain. After a month, they came back. They weren't ready yet. Let's start with a smaller change. So, they set off for Portugal and open a small bar. For five years. After five years, they again long for a change. Let's go on! Actually let's go back! Back to Wales; back to teaching and nursing.

When Ann and Dave turn 55 they try once more. This time more prudent, more mature, different. Dave got made redundant in school anyway so they turn disadvantage into opportunity and cancel their permanent address. This time, they leave forever. I once asked them: "What are your plans for the future?" The answer I got was: "We have no plans. This is our future!" They put all their savings into the boat and via the Channel Islands they sail towards Northern France. Ann and Dave don't sail a lot, they travel. A sailboat is suitable because it's a home that's moving, a home where life is cheap. They follow the Internet weather forecast regularly because they are afraid of the big sea. The height of the waves, the wind speed... The colourful lines of the weather forecast become a part of their life. Along the coast of Spain they sail towards the south of Portugal and stop in Lagos for the winter. In the spring, they continue, passing the Balearics and Sicily towards Malta where they spend the second winter. From Malta they turn north, passing Sicily, Italy and the Ionian Sea towards Corfu – the third winter. The following spring, they continue towards the Bay of Corinth, passing through the Corinth canal, reaching the Aegean and crossing towards Turkey, Finike - their fourth winter. Along the Turkish coast they go back north till they reach the western coast of Turkey. Marmaris - the fifth winter. In springtime they cross the Cyclades, make a few brief stops on the Peloponnese and then come down to Crete. The sixth winter.

Life swings in a slow pace; six months of motion, six months of stagnation. The stagnation is anticipated, the motion between the winter refuges chaotic and spontaneous. By the end of the summer their nerves are strained, bodies exhausted, thoughts restless. Hands can hardly wait to moor the boat to the berth, the electric cable finds its way to the plug, and the hose looks for its faucet. Standing still can on the other hand be unpleasant too, they explained. Darkness, moisture, rain, wind, crowded places. Too many people together, a lot of gossip, many obligations, too many drinks and then monotony.

They don't join in the collective Christmas celebrations at the marina, neither are they a part of the drinking team, they don't play cards, they don't bowl. "At the beginning of winter we were all friends, we were all sailors, and we all belonged ... At the end of the winter, we scatter, we get to know each other, small groups appear, the pontoon politics forms ..." Ann and Dave like to walk. Having company is fun, but they get stuck with pontoon politics instead. Every Thursday one excursion, every Tuesday and Friday yoga, every Tuesday night music. Days are shipshape, time runs fast, freedom slips out of your hand. By the end of winter their nerves are strained, bodies exhausted, their thoughts restless. Hands can hardly wait to push the boat off from berth. The electric cable is folded, the pipe is coiled up, people on the pier – fellow villagers, neighbours and friends – wave their goodbyes, the sound of whistles cutting through the calm blue skies. The rope is untied, the umbilical cord cut.

Dave and Ann don't have a permanent address. Their permanent address is a temporary address. Motion is a constant. "Some people, they keep fake permanent addresses. They have children, parents, relatives... They collect letters, they pay bills, they lie to the officials, they sign documents..." Ann and Dave don't have a permanent address, as they don't have children, or parents. That's why they sometimes have problems. You can't get health insurance without a permanent address. Computer says no. Ann and Dave at least get a bank account. But not without problems. They asked a banker friend: "Why not without problems?" The bank is just following instructions – he shows them the answer to a query he sent to Whitehall: "Her Majesty's Government does not go out of its way to accommodate mavericks ..."

Sometimes they feel like they are disappearing. Disappearing from the world but "...thank god we have Internet and the BBC", they say sarcastically as they regularly follow news from their home country. Their circle of people gets smaller, only good friendships remain. And then, there are new friendships. In other ways, the circle gets bigger every year, encounters are not fleeting anymore, the repetitive procession of people circulating on repetitive, circular blue lines of the Mediterranean. Some are spat out by this circulation, others swallowed by it. Ann and Dave are planning to get off the circular and onto rivers and canals, into the world of locks, sluices, dead and live branches of rivers, towards new adventures. Not yet - next year. For now, it's all just in their minds. To go back? To whom? To what? The house? They don't have enough money for a house, there isn't enough sun back home anyway. Around the world? Not for us! Forward? River canals? Maybe a year more in the Med?

## STORIES, BOATS AND SEAWATER IN PRACTICE

An in-depth investigation of migrants' lives in a broader time scale is especially important due to the fact that: 1. through biographies we as researchers are able to understand migration within the trajectories of individual lives; 2. we gain knowledge about post-migration experiences and 3. we can reflect on the relation between structure and agency, trying to understand cultural narratives in practice or transformed/confirmed through experiences. For Fritz the sea is a constant struggle, for Ines the maritime journey was a change from her previous life (volunteering in Africa would also be an option); for both of them raising their children while traveling on the boat was a dream of a better life, a better world, with a better educational system, with more time for family and children, a more nature-attuned life. Their choice is not only connected with the question of *where* to live but also *how* to live, as Brian Hoey also suggested of his interlocutors moving to rural areas of Michigan (2005). Their choice can also be perceived as a play-work-existence self-experiment on the sea, through which they gain new skills and perspectives on their initial ideas (of freedom for example). The sea as it is framed within Western cultural narratives fits well with ideas of freedom and change (to a better life, a better school), with the idea of self-contemplation (personal escape from consumerism and the neo-liberal economy to a simpler life), adventure and escape (from monotony and patronage, as the Coopers, a pair of well-known sailors, wrote: "When we get very old we get patronized, nannied and grannied, and swept on to the scrapheap ..." (1994: 3)), but the practical realities of living on the boat (especially with a family

and without a pension) reveals other aspects as well. For Fritz and Ines, sailing adventurously, "the old way", didn't feel safe; living in a confined space resulted in quarrels, and while constantly looking for money they both felt agitated, and finally started to turn on each other. Usually, my interlocutors of working age were involved in precarious seasonal jobs such as tourism (chartering or working for charter agencies, sailing or diving schools), peripatetic jobs in marinas offering their skills (sail repair, engine work, boat repair, etc.), or were involved in long-distance jobs associated with their previous professions (translation, computer programming, art, etc.), all the while having to make various different money arrangements to get through the year. In the case of Dave and Ann, the sea was suitable because it offered them a platform for more adventure while they turned disadvantage (redundancy) into opportunity (sea journey) and chose an active retirement. Their experiment of actively coping with redundancy was prolonged beyond a temporary experience but was later on structured within the oscillation between ports and winter sailing communities (forms of belonging) and summer voyages on the open sea (unbelonging). Following their case, a cultural narrative connected with sea imaginaries (adventure, freedom, etc.) was as important as their own individual creative strategy in coping with redundancy. Dave and Ann didn't have to think about their money arrangements as they had pensions, but after a decade of living on the boat they felt like they were circulating on the same track (along with other retired people living on boats), following BBC news while the adventure somehow faded away in this liminal position of *always leaving and never arriving*. They became aware of the humidity, the wetness, the windiness of their new home. They were not desperate, they still enjoyed the "Greek sun" from their small cockpit, they just reflected on their position sardonically (as was also evident from their blogs). In both portraits, my interlocutors talked about themselves as being adventurers, risk-takers (Fritz didn't use GPS), maybe even heroes (Ann and Dave reflected on that when they left home the first time), however it seems as if they didn't in fact escape from the conventional structure but, as Benson argued for her interlocutors in rural France (2011), repositioned themselves within it. Ines and Fritz in a way escaped "the old life", but didn't give up all its privileges and obligations. Ines gave birth in a German hospital (because she felt it was more professional), they kept their apartment in Germany and they choose a "German village" to winter in. Upon the death of Ines's mother, they felt obliged to go back to Germany, so they returned. Coming back was a step backwards (in the same structure) for them even if they were "heroes" among their German friends as "the ones who left".

Following these two portraits it is important to pay attention to the process of (un)learning and to the skills and knowledge they acquired on the way. The initial sea imaginaries and ideas about this lifestyle of freedom were enriched with the new knowledge about *windiness and hardship* (the experiences of the storms, the experience of always following the weather forecast carefully, etc.), of *wetness* (in the wintertime, as Dave and Ann pointed out), of the *perpetual moving* reality of the fluid environment, as well as the knowledge of the *constant change* of social relations, *limited space* (in contrast with the image of the openness of the sea), *invisibility* (e.g. being without a permanent address and migrant status), and different *bodily conditions* (seasickness, a feeling of health, etc.). Although life at sea is difficult to sustain, my interlocutors also acquired new skills, for example how to lead family-work-school life in the new context, how to have less things, how to stay invisible, how to create an economy outside the "possible" paths, and how to live actively in their retirement. Some also acquired various social skills which enabled them to adapt quickly to new situations. It is important to note that these new skills and knowledge were also developed through the process of unlearning. While they put themselves in the position of "swimming along", the process of unlearning was activated and was in the case of my interlocutors translated into an active position of *unbelonging*. It may be that my interlocutors plotted potential ways out or around for future lifestyle migrants or for their personal future experiments. It is interesting to note that for almost all of my interlocutors, the lifestyle migration to a boat was a transitional period of five to ten years followed by the return to their home-country (as in the case of Fritz and Ines), or a wish for or act of relocation (several of the cases I followed sold their boat and bought a house or dreamed of buying a house in rural areas of France, in French Polynesia, rural Spain or rural Sweden

as was the case with Fritz's friends). Those who moved back to the cities reported how they missed the physical aspects of their previous life most; *the air, their health, stars, sleeping outside...* Several of my interlocutors went on to live in "mobile homes" such as caravans or house-trucks, illustrating how their time at sea plotted the way for further experiments.

Following the experiences of my interlocutors on a longer scale, their attempts can be understood as temporarily unbelonging, similar to the aforementioned *Border-Xing* art project as it was reflected on by researcher Emma Cocker (2014). Cocker argues together with Rogoff that unbelonging is not the condition of "being at a loss, of inhabiting lack, of not having anything, but rather an active, daily disassociation in the attempt to clear the ground for something else to emerge" (Rogoff 2011 in Cocker 2014: 58). The sea, as a place which for migrants signifies something loosely defined as quality of life, has a quality of a "gap", which can be inhabited also due to modern technology (the very accurate colourful weather forecasts that Dave and Ann follow, modern sailboats, etc.), and from where one can go in different directions. For a few retired couples such a choice can even be an end point (one of Bill and Laurel Cooper's most popular books, entitled *Sail into the Sunset. A Handbook for "Ancient" Mariners* (1994) has all kinds of advice on how to die on the boat, how to sail into death so to speak, in the aptly named chapter *Your Time is Up*), while for families it can be an intermediate phase. The geographic place of the sea and the liminal imaginaries of the sea can be used as a jumpstart that enables individuals to reflect or even rearrange work and family life, or it can be inhabited in a more permanent sense in order to achieve an active retirement. The models of liminality and the liminoid are in the case of my interlocutors only partly useful, as they entered this "liminal position" voluntarily and once "there" they are also actively creating their future options (rather than passively experiencing the leisure space) by observing their new position and by adopting a critical view that develops into *criticality* – a way of inhabiting the problem rather than analysing it (Rogoff 2006). The point of criticality, following Irit Rogoff, is not to find an answer but rather to access a different mode of inhabitation, while in the duration of the actual inhabitation "...a shift might occur that we generate through the modalities of the occupation rather than through a judgement upon it" (Rogoff 2006: 2). It is exactly the shift in the post-migration period towards new knowledge and new skills (acquired in the state of temporarily unbelonging and leading to future unknown directions) that can be effectively observed through a longitudinal qualitative approach. The desire of my interlocutors to change things by temporarily unbelonging does not signal a passive or romantic longing for wilderness or freedom (even if it is initially informed by these imaginaries), but it rather creates a productive gap that enables them to learn new modes of action and thought. It would seem that the sea functions as a perfect symbolic and material platform for such endeavours.

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## POVZETEK

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### »ODJADRAJ«: BIOGRAFSKI PRISTOP KOT ORODJE ZA RAZUMEVANJE KONCEPTA ZAČASNEGA NEPRIPADANJA

Nataša ROGELJA

Idejo »odjadraj« lahko širše kontekstualiziramo z mitom o odhodu, ki je bil v popularnem diskurzu 20. in 21. stoletja izjemno odmeven še zlasti med pripadniki srednjega razreda. Benson in O'Reilly (2009) trdita, da iskanje boljšega načina življenja odseva širše življenjsko-stilske izbire, ki jih posamezniki v postmodernem svetu vsakodnevno sprejemajo, medtem ko nedavno povečanje tega pojava nakazuje, da se delno pojavlja kot rezultat refleksivne presoje priložnosti, ki jih Giddens (1994) identificira kot nedavno omogočene in ne toliko kot neposreden izid relativnih ekonomskih privilegijev (Benson in O'Reilly 2009). Razne družbene spremembe, na primer globalizacija, individualizacija, fleksibilne zaposlitve (Amit 2007) in poenostavljena mobilnost (Urry 2004, Sheller in Urry 2006, Sheller 2011), so omogočile pojav privilegiranih oblik mobilnosti, kakršna je življenjsko-stilska migracija. V zvezi z v članku predstavljenimi pomorskimi življenjsko-stilskimi migranti v Sredozemlju obstaja nekaj specifičnih razlogov, ki omogočajo tovrstno migracijo: odprtje notranjih meja v EU, nagel razvoj dostopne navigacijske tehnologije, porast števila agencij za najem plovil in navtičnega turizma, ki je populariziral užitke križarjenja, kakor tudi nekateri nedavni družbenopolitični dogodki v Evropi, od povečanega življenjskega standarda do recesije in razočaranja nad prevladujočim sistemom nacionalnih držav v z globalnim kapitalizmom zaznamovani družbi (D'Andrea 2006, 2007; Juntunen, Kalčić, Rogelja 2014).

Na teh opazovanjih članek raziskuje povezavo med morjem, imaginariji morja in življenjsko-stilskimi migracijami. Z uporabo longitudinalnega kvalitativnega raziskovanja, zlasti biografskega pristopa, se ukvarja z vprašanjem, na kakšen način so imaginariji morja navdih za življenjsko-stilske migrante in kako se *in situ* prevajajo v prakso. Z etnografijo predstavi idejo nepripadanja, ki jo je na izkušnjah migrantov razvila Rogoff (2000). V prvem delu članek razpravlja o morju kot fizičnem prostoru in za sogovornike pomembnem simbolu, povezanim z idejami liminalnosti in začasnega nepripadanja. Za osvetlitev podrobnosti iz življenj posameznikov v daljšem časovnem obdobju sta v naslednjem delu predstavljena dva reprezentativna (družinska) portreta, medtem ko v zadnjem delu članka objavljene individualne zgodbe imaginarije morja in izkušnje sogovornikov postavljajo v dialog. To omogoča lažje razumevanje pričakovanj, teženj in izkušenj sogovornikov in pogloblja razprave o začasnem nepripadanju v praksi.

# LIFESTYLE MIGRATION BEYOND CONSUMPTION – PRODUCTION BINARIES: DUTCH MIGRANTS AND MULTIFUNCTIONAL RURAL LAND USE IN SWEDEN

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## ABSTRACT

### **Lifestyle Migration beyond Consumption – Production Binaries: Dutch Migrants and Multifunctional Rural Land Use in Sweden**

Lifestyle migration literature often focuses on lifestyle migrants as consumers. However, this paper shows how various modes of production are involved in everyday migrant lives as they seek to produce the lifestyles sought. The paper's aim is twofold: to explore issues of production in lifestyle migrants' everyday lives, and to examine these migrants' potential contributions to local rural development in lagging rural areas such as Swedish Bergslagen. This aim is addressed through two in-depth interview studies. The findings suggest that the respondents combine lifestyle-led motivations with seeking labour opportunities. Hence, studying these migrants is useful for investigating newcomers' multifunctional rural land use and examining how their engagements with local rural development increases our understanding of their post-migration lives in lagging rural areas.

**KEY WORDS:** consumption, Dutch lifestyle migrants in Sweden, multifunctional rural land use, production, lagging rural areas

## IZVLEČEK

### **Življenjsko-stilske migracije onkraj dvojice potrošnja – proizvodnja: nizozemski migranti in večnamenska uporaba kmetijskih zemljišč na Švedskem**

Literatura o življenjsko-stilskih migracijah se pogosto osredotoča na življenjsko-stilske migrante kot potrošnike, pričujoči prispevek pa prikazuje, kako se različni načini proizvodnje vključujejo v vsakdanje življenje migrantov, ko si ti prizadevajo ustvariti želeni življenjski slog. Namen članka je tako dvojen: raziskati proizvodnjo v vsakdanjem življenju življenjsko-stilskih migrantov in njihove možne prispevke k razvoju podeželja na manj razvitih območjih, kakršen je švedski Bergslagen; teh raziskav se s poglobljenimi intervjuji loti v dveh študijah. Izsledki kažejo, da sodelujoči motivacijo glede življenjskega sloga združujejo z iskanjem priložnosti za delo. Študija o življenjsko-stilskih migrantih je zato koristna za raziskovanje, kako prišleki uporabljajo kmetijska zemljišča in kako njihova vpletenost v razvoj podeželja povečuje razumevanje njihovega post-migrantskega življenja na manj razvitem podeželju.

**KLJUČNE BESEDE:** potrošnja, nizozemski življenjsko-stilski migranti na Švedskem, večfunkcionalna uporaba kmetijskih zemljišč, proizvodnja, manj razvito podeželje

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## A DOUBLE FOCUS ON CONSUMPTION AND PRODUCTION

This paper is inspired by seminal work on international counterurbanisation, ‘consumption’ of countryside (Buller & Hoggart 1994) and lifestyle migration to rural areas (Benson 2011). It is also motivated by previous studies of lifestyle migration and entrepreneurship in rural Southern Europe (Stone & Stubbs 2007), reflections on next rural economies (Halseth et al. 2010), rural revival through regional migration (Connell & McManus 2011) and possible future research into contested spatialities of lifestyle migration (Haas et al. 2014). Adding valuable human geographic perspectives to this expanding body of lifestyle migration literature, this paper focuses on two issues: lifestyle migrants’ potential contributions to rural diversity and what the migrants’ engagements with rural development tell us about consumption and production in lifestyle migrant lives.

Such a double focus is motivated by two initiatives. First, O’Reilly (2014) initiated an e-mail discussion on local social and economic impacts of lifestyle migration, studied previously by Fountain and Hall (2002) and indicated later by Benson and Osbaldiston as relevant in lifestyle migration research (2014: 14). Second, Kordel and Weidinger (2014) raised issues concerning regional development during the London workshop on the future of lifestyle migration research. Thus, this study examines how various modes of production are involved in everyday migrant lives as they seek to produce the lifestyles sought. As such, it extends the field of lifestyle migration by investigating the potential social and economic impacts of incoming lifestyle migrants on rural localities.

This paper draws on experiences of Dutch lifestyle migrants in rural Bergslagen, a lagging Swedish area. One point of departure is that the study area has experienced more difficulties in responding to economic stagnation and depopulation, although it can be debated to what extent such lagging destinations generally differ from amenity-rich lifestyle migration destinations (Benson & Osbaldiston 2014; Moss & Glorioso 2015). Nonetheless, these areas often lack employment opportunities and the amenities that are commonly required to attract amenity migrants. Hence, incoming lifestyle migrants can provide welcome socio-economic impulses to increase lagging rural areas’ economic, demographic and cultural diversity.

This paper sees multifunctional rural land use as a potential for increasing socio-economic diversity in lagging rural areas, helping them to avoid single-industry dependence and suffering from declining primary industries. As the studied destinations in Swedish Bergslagen have traditionally been characterised by industrial production, forestry and to a lesser extent agriculture (Åkesson 1998), the question is whether they now transform into places of consumption mainly for urban dwellers (Lundmark 2010). Moreover, with some notable exceptions (e.g. Stone & Stubbs 2007), the majority of lifestyle migration studies have focused on migrants consuming assets of their destinations rather than on post-migration issues of production related to economic activities.

Against this background, the aim of this paper is to explore issues of production in lifestyle migrants’ everyday lives, and to examine the migrants’ potential contributions to local rural development in Swedish Bergslagen. This aim is addressed through in-depth interviews with Dutch migrants in three Swedish municipalities in 2011 and 2014. They are analysed within the framework of local rural development, identifying vulnerabilities and possibilities for integration of rural areas into wider debates on problems in sparsely populated nations like Sweden (Lundmark 2010). Thus, the paper aspires to establish Nordic rural areas within the wider consideration of lifestyle migration destinations, as political, socio-economic and natural climates in northern Europe differ from those elsewhere.

The next section describes the methods used, before perspectives on production and consumption are related to rural development and lifestyle migration in the following section. Previous studies indirectly addressing lifestyle migrants’ potential contributions to rural development in Sweden are then presented as a bridge to the empirical section. This empirical section relates Dutch lifestyle migrants’ experiences in Swedish Bergslagen to issues of consumption and production. As such, it explores lifestyle migrants’ potential role for local rural development in sparsely populated areas in

developed countries. The conclusion more concretely indicates how issues of production can contribute to lifestyle migration research, suggesting issues for further research in this field.

## METHODOLOGY

Figure 1: The current geographic shape of the Swedish Bergslagen area (Source: Adapted from Intresseföreningen Bergslaget, 2015)



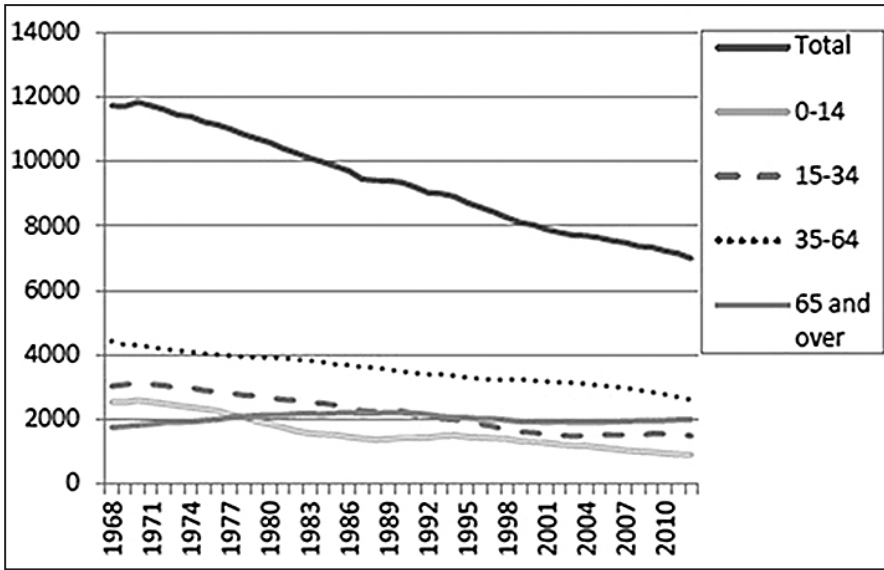
This paper is based on two in-depth interview studies in Sweden: one conducted in 2011 in the county of Örebro and the other conducted in 2014 in the county of Värmland (Figure 1). The residential towns of Karlstad (Värmland county) and Örebro (Örebro county) are indicated with black squares. The borders of Bergslagen are based on cultural views rather than administrative divisions. The Bergslagen area stretches over five counties (Swedish: *län*), mainly consisting of depopulating post-industrial municipalities.

The one to two hours' journey by car or bus between these municipalities and employers or secondary schools in the residential towns of Örebro (pop. 141,382) and Karlstad (pop. 87,797) is too long for daily commuting (Statistics Sweden 2014b). Similar circumstances are found in a third of Europe's regions, which struggle with declining economically active populations (Klingholz 2009).

For example, Hällefors in Örebro county has experienced the fifth largest municipal population decline in Sweden since 1970 (Swedish Television 2013). Figure 2 illustrates how Hällefors' population decreased steadily from 11,723 in 1968 to 6,888 in 2014, and how the relative share of the elderly (aged

65+) has increased over time (Statistics Sweden 2014b). Similar trends can be observed in the municipalities of Hagfors (pop. 11,987) and Munkfors (pop. 3,651) in Värmland (ibid.). Once thriving with mining and forestry, these municipalities are now suffering from rising levels of unemployment and younger generations leaving the area, shrinking public and private service sectors, falling housing values, and growing concerns about who is going to care for the elderly (Niedomysl & Amcoff 2011: 276). The area’s traditional patriarchal society with a hierarchical production structure hampers adaptation to post-industrial conditions where innovative entrepreneurship is desired (Eimermann 2015: 69).

Figure 2: Population of Hällefors; total and age groups (years) (Source: Eimermann, 2013a: 18)



Hällefors was the first Swedish municipality attempting to attract new residents from abroad through a three-year “Holland project” starting in 2004 in cooperation with the privately-owned migration consultancy agency Placement. Värmland has engaged in similar efforts as a county council representing a group of municipalities (Eimermann 2013b). Resulting either directly or indirectly from these place marketing efforts, the Dutch families interviewed for this paper settled in these lagging destinations during the first decade of the third millennium.

A total of 23 interviews was conducted, the majority at the respondents’ homes or work environments. Dutch families in Hällefors were selected in 2011 regardless of their mode of employment as part of fieldwork for a doctoral thesis (Eimermann 2013a). Data gathering in 2014 focused specifically on Dutch rural tourism entrepreneurs in Hagfors and Munkfors. This most recent interview study is conducted as a sequel to a study by Lundmark et al. (2014) who point at international migrants’ potential contributions to rural development in lagging Swedish areas. Subsequent updates were obtained through e-mail contact and social media (e.g. on the respondents’ employment status).

The interviewees were found through contacts with other Dutch migrants in the area, browsing the internet and reading tourism brochures. The interview guidelines of both studies were similar and consisted of four parts: the first part on backgrounds and socio-economic characteristics was followed by questions on visiting Sweden prior to moving (part 2), motivations for moving (part 3), and post-migration experiences in the final part. The interviews were 100-180 minutes in length and transcribed verbatim. The migrants’ local social and economic impacts are identified through analysis of the transcripts. They are discussed in relation to economic, socio-cultural and demographic rural change in this paper.

## EX-URBAN MIGRANTS AND MULTIFUNCTIONAL RURAL LAND USE

This section further explores the double focus on production and consumption. It first addresses how lifestyle migration has mostly been presented as a consumption-driven trend. It then looks at recent rural transformations related to increased consumption and provision of rural products and services in response to demands mainly coming from urban areas (Lundmark 2010: 2). This section thus provides a point of departure for studying how lifestyle migrants produce their preferred lifestyles and how this can contribute to local rural development.

Regarding the first focus, Hall and Williams (2002) suggest that motives for urban-rural moves can be production-led, consumption-led or a combination of both. They propose that tourism entrepreneurial migration is production-led, although this type of mobility implies a combination of lifestyle-seeking migration and labour migration where the migrants' motivations could be identified as either predominantly economic or quality of life-related (Hall & Williams 2002: 31). Motivations for consumption-led mobility can be plotted on a similar continuum, "where consumption and production motives may blur and be combined" (ibid., 34). This intersection of consumption- and production-related motives forms the background for the present study of Dutch migrant's post-migration everyday lives.

However, the field of lifestyle migration widely presents the studied migrants' motives as consumption-driven. The studies collected by Benson and O'Reilly (2009) demonstrate how various respondents across the globe and over time share fundamental features in their search for different lifestyles: they are looking for the 'good' or 'simple' life and the opportunity for self-realization, while escaping from individual and community histories (O'Reilly & Benson 2009). These and subsequent texts (e.g. Benson 2010; Torkington et al. 2015) emphasise lifestyle migration as a consumption-driven trend.

British family migrants, retirement migrants and mid-life migrants in the rural French department of the Lot relate residential choice to consumption criteria (Benson 2010). Although mid-life migrants often lived more remotely in "small hamlets with no local amenities" (ibid., 53), what they consume has been conceptualised as rural amenities or a rural idyll (Gaspar 2015). Amenities are "non-traded goods that cannot be consumed without moving to the area where these are available" (Graves & Linneman 1979: 384), such as favourable climatic conditions and scenic qualities. As migrants can value some amenities over others, the decision to migrate to a particular area is based on perceptions of more suitable local amenities there compared to other areas.

Boyle and Halfacree (1998: 9-10) describe the rural idyll as "physically consisting of small villages joined by narrow lanes and nestling amongst a patchwork of small fields [...]. Socially, this is a tranquil landscape of timeless stability and community, where people know not just their next door neighbours but everyone else in the village". This perception of the rural idyll often contrasts with rural realities experienced in post-migration everyday lives. Yet, it persists among the majority of British and other lifestyle migrants to rural areas.

This leads us to the second focus of this section: local rural development and related concepts of post-productivism and multifunctionality. Governments on various geographical levels have attempted to respond to processes of rural restructuring by developing deprived and sparsely populated rural areas. These attempts are often termed rural development. They include the "repacking of the countryside for the new consumption-based economy" (Woods 2009: 129). The rationales behind rural development are summarised as "welfarist" (the state supporting basic social well-being and equity among its citizens) or "economic" (the state supporting business in the accumulation of capital) (ibid., 145). Another rationale is spatial control over population distribution in order to mitigate instability, demanding a reevaluation of public services (ibid.).

These rationales relate to the debated and contested concept of post-productivism (Evans et al. 2002: 325; Mather et al. 2006: 454; Woods 2009: 47-57). Although debated, the concept is nevertheless useful for studies of rural change in agricultural heartlands. This is illustrated by a recent conceptualisation of post-productivism, stressing "the potential efflorescence of a range of alternative niche-farm

and *non-farm* industries and enterprises in agricultural heartlands [...], with largely *ex-urban migrants* bringing their own *interpretation* of rural life to their new locale" (Argent et al. 2010: 18, emphasis added). This definition goes beyond the urban-rural dualism presented by Champion and Hugo (2004), as it connects urban and rural areas through increasingly mobile people and ideas. Moreover, the definition is in line with the purpose of this paper since it includes alternative non-farm industries such as tourism.

These increasing connections between urban and rural areas create multifunctional rural landscapes in and beyond agricultural heartlands. Argent et al. (2010: 18) claim that strategically located rural land is "being progressively valued not for its production capacities but for its perceived aesthetic, capital gain and status features". Hence, also in areas characterised by de-industrialisation (such as Swedish Bergslagen), rural dwelling and land use are motivated ever more by consumption values over production ones (ibid.). Wilson (2001: 96) similarly asserts that the related concept of multifunctionality "better encapsulates the diversity, non-linearity and spatial heterogeneity" of rural society, thus embracing the social and environmental impacts of multifunctional rural land use (Woods 2011).

In other words, post-productivism looks at broader geographical scales and policy discourses, while the concept of multifunctionality addresses local economic and socio-cultural changes in rural land use, demography and society (Almstedt et al. 2014). Müller (2011) however, reminds us that multifunctionality is not a novel phenomenon, as Nordic rural areas have a long history of diverse activities, such as second home ownership and the presence of second home owners. The following section explores whether or not Dutch lifestyle migrants in rural Sweden contribute to multifunctional rural land use.

## DUTCH LIFESTYLE MIGRANTS AND RURAL DEVELOPMENT IN SWEDEN

The rural changes described above are often related to ex-urban migrants (Argent et al. 2010: 18). It is clear that urban-rural lifestyle-led international migration has gained attention in Nordic countries over the past decades (e.g. Swedish Radio 2011). The Swedish National Rural Development Agency (SNRDA 2008) noticed a rising number of Dutch migrants in Sweden. The annual number of people moving from the Netherlands to Sweden has increased from 494 in 1995 to 1450 in 2013 (Statistics Netherlands 2014). The total number of Dutch-born migrants living in Sweden more than doubled from 4,532 in 2000 to 9,781 in 2013 (Statistics Sweden 2014a). Moreover, SNRDA (2008: 46-52) noticed that Dutch incomers opt for rural destinations to a larger extent than other immigrant groups from Europe (e.g. Poland and Germany). Hedberg and Haandrikman (2014: 133) illustrate this with their finding that 15% of all European migrants living in rural Sweden in 2008 were born in the Netherlands (compared with 6% in Swedish urban areas).

Undergraduate studies in Sweden associate such Dutch and other lifestyle migration to rural Sweden with transnational entrepreneurship, rural development, integration and identity formation. One of the earliest findings in this field comes from a study by Andersen and Engström (2005), in cooperation with the Chamber of Commerce in Värmland, who concluded that Swedish stakeholders need to make more efforts if they want to enable these Dutch newcomers to establish their enterprises in Sweden.

This is relevant because Värmland and an increasing number of other rural Swedish stakeholders attempt to develop rural place marketing strategies in order to attract newcomers from the Netherlands and other parts of Northwest Europe (NUTEK 2007: 92-97; Eimermann 2013b). Värmland (2015) receives funding from the European Regional Development Fund (ERDF) to cover the costs of attracting new residents at the annual Emigration Expo (2015) in the Netherlands. The Dutch-Norwegian migration consultancy agency Placement (2015) organises similar information meetings. Since its foundation in 2003, Placement has assisted over 2,500 Dutch and Belgians in their migration to Norway, Sweden or Denmark. Recently, Region Dalarna (2015) has broadened its strategy to include German and British prospective migrants as well.



In addition to international lifestyle migration, Thulemark (2015) studies domestic lifestyle migration in Sweden, referring to previous research on similar urban-rural migration by Stenbacka (2001) and Amcoff (2004). Based on longitudinal micro-data, Thulemark et al. (2014) analyse incoming lifestyle migrants employed in tourism and their role for rural development in the Scandinavian Mountains. Once lagging and peripheral rural localities, the Sälen and Idre municipalities in the Dalarna region were developed by the Swedish state as tourism destinations as early as the 1970s, and adapted to economic recessions some twenty years later (*ibid.*, 411). Creative in-migrating tourism workers can contribute to rural development, but the volume and structure of employment opportunities in tourism vary in different destinations (Thulemark et al. 2014). Thus, various areas attracting new residents can experience rather different magnitudes and types of in-migration (*ibid.*, 419).

Similarly, Overvåg (2012) studies leisure- and nature-based migration to Scandinavia, exemplified by European entrepreneurs offering dog sledding experiences. He argues that these in-migrants (mainly from Germany and the Netherlands) contribute with skills and competences to the local labour market (*ibid.*). Therefore, regions that aim to attract more such in-migrants should develop and improve their use of local natural resources. On the other hand, comparing local and newcomer entrepreneurs in rural areas, Akgün et al. (2011: 1218) find that the motivation and behaviour of newcomer entrepreneurs appear to be primarily related to their own lives and needs, rather than to concerns with local rural development. Similarly, Overvåg (2012: 266-267) warns of the risks of focusing too much on one branch (tourism) at the expense of other branches, and that strategically settling and leaving migrants (e.g. Eimermann 2014) can result in a porous society instead of social sustainability.

In sum, lifestyle migration has gained importance in studying incomers' contributions to local rural development in Sweden. The migrants' strategic switches (as a result of continuous comparisons between various places) offer opportunities for and pose threats to the local social fabric. This paper's conclusion discusses how future research can study these realised opportunities and averted threats in different rural locales.

## THE RESPONDENTS' MULTIFUNCTIONAL USE OF THE SWEDISH RURAL ENVIRONMENT

Table 1 presents the interviewees and their occupation after migration. This table indicates varied occupations for the respondents interviewed in 2011. Often, females combine working part-time in different sectors. As a result of few local employment opportunities, the migrants frequently changed post-migration occupation in search of their aspired lifestyle. For instance, the couple in family 12 explained how they initially aimed at continuing their post-production company after migration but gradually shifted towards hand-painting and organising local events such as an ice sculpture festival and a kiting day. Likewise, family 5 combines income from their small B&B, the male working as a freelance illustrator and the female combining part-time work as a teacher with working in marketing. On aggregate, this indicates both that few jobs are available in rural areas such as Swedish Bergslagen and that the rural environment offers a multitude of possibilities for migrants willing to use this environment in multiple ways.

The respondents interviewed in 2014 also develop multifunctional rural land use through their activities in rural tourism. For instance, the hotel managers in family 14 are planning to develop hiking trails and a beaver safari. In their opinion, local tourism entrepreneurs don't see the potential for developing such initiatives. Family 16 bought a piece of land, built a pancake restaurant and a mini golf course which they run during summer, combining this with income from the male working as a plumber during the off-season. Similarly, family 17 offer lessons in horseback riding, horseback rides through the area, quad excursions, accommodation and a western style restaurant at their horse

ranch. Likewise, the male in family 21 has plans to use his experience as a mountain biker to develop a mountain biking trail near the family's B&B. This also indicates how these economically active family migrants employ their creativity to consciously pursue their aspired post-migration lifestyle, and how they need multiple sources of income in order to make a living.

One important reason why these migrants need to find their desired post-migration lifestyle in various creative ways is that Swedish Bergslagen is a lagging area with few job opportunities. Hence, the female in family 10 worked in industrial design with her partner before starting a small flower shop, followed by working at an employment agency in a neighbouring and larger municipality to increase the family's income.

Table 1. Interviewees and their post-migration occupations.

2011	Occupation (Hällefors)	2014	Occupation (Hagfors, Munkfors)
1	♂ Producer ♀ Art project leader	14	♂ Hotel manager ♀ Hotel manager
2	♂ Road constructor ♀ Shop owner	15	♂ B&B, camping manager ♀ B&B, café, shop owner
3	♂ Restaurant owner ♀ Restaurant owner	16	♂ Restaurant owner, plumber ♀ Restaurant owner
4	♂ Self-employed (safety at work) ♀ Self-employed (safety at work)	17	♂ Technical support at horse ranch ♀ Horse ranch owner
5	♂ Illustrator ♀ Teacher (pt), B&B, marketing	18	♂ Restaurant owner, letting apartm. ♀ Restaurant owner, letting apartm.
6	♂ Hostel manager ♀ Hostel manager	19	♂ Technical support at café ♀ Café owner
7	♂ Truck-driver ♀ Nurse (pt)	20	♂ Restaurant and pub owner ♀ Restaurant and shop owner
8	♂ Carpenter ♀ Nurse (pt), shop owner	21	♂ Restaurant and B&B owner ♀ Restaurant and B&B owner
9	♂ Forestry, camping manager ♀ Manager of small food shop	22	♂ Involved in Holland projects ♀ Involved in Holland projects
10	♂ Self-employed (industrial design) ♀ Employed at employment service	23	♂ Involved in Holland projects ♀ Passed away recently
11	♂ Secondary school teacher ♀ Nurse (pt)	-	
12	♂ Editor, motion designer ♀ Director at media company	-	
13	♂ Employed at factory ♀ Self-employed (cleaning service)	-	

Source: Fieldwork 2011 (county of Örebro) and 2014 (county of Värmland). (pt = part-time)

Perhaps the story of family 9 is the most pertinent:

We settled in Hällefors in 2007 after having spent holidays in Sweden several times over the past decades. We bought a dilapidated house as a temporary residence (top left in Figure 3), close to a lake, and our intended future home, after renovation (bottom right). One main reason for choosing this destination was related to agricultural possibilities. Our migration was based on a plan to start a small enterprise with a shop selling organic food. Partly financed by the ERDF, such a shop was soon constructed (top right). We started cultivating vegetables, strawberries, raspberries and blackcurrants. The idea is to sell these fruits in the shop, but at the

moment the shop is used for small art exhibitions and as a meeting place for the local hunters' organisation. We also use it as a reception for our newly built camping site, advertised mainly through the internet. (Interview family 9, 2011)

At the time of the interview, the male in family 9 had been working for two years in forestry, since this was a more stable source of income and was related to his previous education and internship in Sweden. The female had worked part-time at a hotel, cleaning guest rooms to secure income in the period directly following migration. But soon she combined this with renovating a former barn down the road to adapt it for poultry, horses and sheep (bottom left in Figure 3). The family organised annual sheep shearing days. She told me that "the village consisted of a few elderly people. They were happy that a family with three young children had moved in here. And the grazing horses and sheep keep the countryside open and revitalise it." The family said the local population appreciated them and other Dutch incomers, as their initiatives and hard work contributed to the maintenance of infrastructure and land.

Later, family 9 bought a cow together with six other families, as part of a LEADER project, with the aim to render local agriculture more sustainable. This cow lives in the family's barn and is taken care of by the seven families living in neighbouring localities, who also enjoy her milk and cheese. One goal is to slowly increase the number of cows – and perhaps pigs – in the future in order to create a self-sustaining dairy and meat industry. Also, the idea is that local cohesion among these and other families will grow, for instance through monthly meetings or producing cheese together. According to one of the participants, "to have a living cow in the pasture is a symbol of a living countryside" (Nerikes Allehanda 2014: 4).

Figure 3: Properties owned by family 9 in Hällefors (Photo: Marco Eimermann, 2011)



Summarising her everyday life after migrating to rural Sweden, the female in family 16 said “in fact, we bought freedom”. She referred to being able to purchase a piece of land at a rather strategic location along the municipality’s main road, renovating and constructing buildings and working in their restaurant during summer. The female horse ranch owner in family 17 reasoned along similar lines:

“The natural setting is attractive; we wanted water and mountains, affordable and not-too-distant property – further north housing is cheaper, but it would be too far from our target groups in mainland Europe. And of course, we wanted grazing and riding space for our (20) horses.” (Interview family 17, 2014)

During high season, many respondents (e.g. family 14, 16, 17 and 19) hire staff for their businesses through Dutch friends, family and organisations. They are brokers between Bergslagen and international social networks. Thus attracting lifestyle migrants to lagging areas also means attracting new ideas and diversifying local social networks.

As such, the interviews show that entrepreneurial incomers not only create jobs, but also foster quality of life in their destinations. Yet, the jobs created can be seasonal, part-time or limited in volume. It can be questioned whether all incoming lifestyle migrants care about the quality of life in their communities, or whether they prioritise realising their dreams rather than stimulating rural development. This is a relevant question, since transferring, acquiring or starting a small rural business in an idyllic setting may be solely motivated by the migrants’ aspirations to improve their own quality of life (Akgün et al. 2011).

## CONCLUSION

This paper’s twofold aim was to explore issues of production in lifestyle migrants’ everyday lives, and to examine the migrants’ potential contributions to local rural development in Swedish Bergslagen. It studied Dutch economically active family lifestyle migrants in this lagging rural Swedish area and their post-migration search to produce the lifestyles sought. The findings can be analysed considering three points related to lifestyle migration research.

First, this paper reinforces the argument that it is valuable to reflect on similarities and differences between lifestyle migration and amenity migration (e.g. Benson & Osbaldiston 2014). In contrast to Sälen and Idre in Swedish Dalarna (Thulemark 2015), the Bergslagen area lacks job opportunities and has not fully managed to mediate its local amenities as part of its repackaging for the new consumption-based economy (Woods 2009). This is why Swedish Bergslagen is considered a lagging area. Considering lifestyle migrants’ contributions to local rural development, the interviewees illustrate how their ideas and approaches diversify local social networks, which contributes to economic, socio-cultural and demographic rural change.

If there is a distinction between amenity-rich migration destinations and low-amenity rural areas, what would this difference imply for local rural development? Comparing (amenity) migration to prosperous destinations with (lifestyle) migration to lagging areas can contribute to understanding why certain rural locales are thriving while adjacent places are not. Differences and similarities will vary from case to case, with opportunities for employment and education as pivotal points. Hence, this paper points at the contribution of lifestyle migrants to the increase of multifunctional rural activities as well as economic, demographic and cultural rural diversity.

Second, it is valuable to study various (lifestyle) migrants’ potential contributions to local rural development. For this purpose, research should include more than domestic moves by Swedes working in tourism in the Norwegian-Swedish mountain range (Thulemark 2015) or Dutch, German and other European migrants of all ages. For instance, Hedberg and Haandrikman (2014) consider how Thai women and marriage migration contribute to globalisation of the Swedish countryside. This also opens up

for examining gender issues, both within families and between regions of origin and destination (for instance, female entrepreneurship is rather novel in Swedish Bergslagen, see Hedfeldt 2008).

Further studies of local rural development through lifestyle migration could increase our understanding of what deprived rural places offer, in terms of opportunities and threats for lifestyle migrants' aspirations. In this sense, Overvåg (2012) argues justly that strategically settling and departing migrants can result in a porous society instead of social sustainability. Although not anticipated in the rural place marketing strategies, these migrants' flexible presence and enterprises can contribute to local economy and attract new (flexible) dwellers through their social networks. As such, lagging lifestyle migration destinations such as Swedish Bergslagen not only attract lifestyle migrants, but also their international networks as a potential contribution to local economy. Various groups and types of strategically switching lifestyle migrants, as well as their possible role as agents of rural change, can become a prominent part of future research in the field of local rural development (Woods 2009).

Third, this paper demonstrates how the interviewed migrants are in fact both lifestyle seekers and labour migrants (Hall & Williams 2002: 31). Seeking their aspired lifestyle, they often transfer, acquire or start a small business, involving their existing social networks. The majority of interviewees in this study are economically active family migrants. This paper's argument to more prominently add production to studies of lifestyle migration originates from this empirical material, but it is worth considering how other groups (e.g. retirement migrants and mid-life migrants, Benson 2010) seek to produce their sought lifestyles as well.

The themes of local rural development and issues of production in consumption-driven migration have been explored here using examples from Nordic rural areas. This exploration can engage academics from different fields, such as rural geographers studying rural change and sociologists exploring how the migrant's views on rural development increases our understanding of their post-migration lives in lagging rural areas.

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## POVZETEK

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### ŽIVLJENJSKO-STILSKE MIGRACIJE ONKRAJ DVOJICE POTROŠNJA – PROIZVODNJA: NIZOZEMSKI MIGRANTI IN VEČNAMENSKA UPORABA KMETIJSKIH ZEMLJIŠČ NA ŠVEDSKEM

Marco EIMERMANN

Čeprav se literatura o življenjsko-stilskih migracijah pogosto osredotoča na življenjsko-stilske migrante kot potrošnike, pričujoči prispevek prikazuje, kako se različni načini proizvodnje ob prizadevanju migrantov za ustvarjanje zaželenega življenjskega sloga vključujejo v vsakdanje življenje migrantov. Izhaja iz težav pri odzivu na ekonomsko stagnacijo in depopulacijo. Ker so raziskovane destinacije v švedskem Bergslagnu tradicionalno zaznamovali industrijska proizvodnja, gozdarstvo in v manjši meri kmetijstvo (Åkesson 1998), se postavlja vprašanje, ali se lahko preoblikujejo v prostore potrošnje za pretežno urbane prebivalce (Lundmark 2010).

Namen članka je dvojen: raziskati probleme proizvodnje v vsakdanjem življenju življenjsko-stilskih migrantov in njihove možne prispevke k razvoju podeželja na manj razvitih območjih, kakršen je švedski Bergslagen. Teh vprašanj se avtor loti s poglobljenimi intervjuji s 23 nizozemskimi migrantskimi družinami na Švedskem loti v dveh študijah. Prva kot del terenske raziskave za doktorsko disertacijo obravnava nizozemske migrante v občini Hällefors, leta 2011 izbrane ne glede na njihovo zaposlitev. Druga študija je nastala leta 2014 in se je osredotočila zlasti na nizozemske ponudnike kmečkega turizma v občinah Hagfors in Munkfors.

Izsledke je mogoče analizirati glede na tri teme, povezane z raziskavami življenjsko-stilske migracije. Prvič, članek krepí argument, da je vredno premisliti o podobnostih in razlikah med življenjsko-stilsko migracijo in migracijo prednosti (npr. Benson & Osbaldiston 2014). Drugič, vredno je proučevati razne možne prispevke (življenjsko-stilskih) migrantov k lokalnemu razvoju. Nadaljnje študije lokalnega ruralnega razvoja kot posledice življenjsko-stilskih migracij bi lahko povečale razumevanje tako priložnosti kot groženj, ki jih deprivilegirana podeželska območja nudijo obravnavanim migrantom. Tretjič, članek prikazuje, da so intervjuvani migranti pravzaprav hkrati življenjsko-stilski in delovni migranti (Hall & Williams 2002: 31). Ob iskanju zelenega življenjskega sloga se pogosto preselijo in pridobijo ali ustvarijo majhno podjetje, ki vključuje njihovo obstoječo družbeno mrežo. Lokalni ruralni razvoj in problem proizvodnje v primeru migracij, ki jih motivira potrošništvo, sta predstavljena s primeri z nordijskih ruralnih območij. V te raziskave bi se lahko vključili akademiki različnih strok, med njimi ruralni geografi, ki proučujejo spremembe podeželja, in sociologi, ki raziskujejo, kako razmišljanje migrantov o lokalnem ruralnem razvoju povečuje razumevanje njihovih post-migracijskih življenj v manj razvitih podeželskih regijah.



R A Z P R A V E I N Č L A N K I

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



# HOME BETWEEN *BIDESH* AND *SHODESH*: DOMESTICATION OF LIVING SPACES, IDENTITIES AND GENDER EXPERIENCES IN THE BANGLADESHI DIASPORA

Francesco DELLA PUPPA<sup>1</sup>

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## ABSTRACT

### Home between *Bidesh* and *Shodesh*: Domestication of Living Spaces, Identity and Gender Experiences in the Bangladeshi Diaspora

This article deals with the housing strategies and changing living styles of the Bangladeshi population in a small town in north-eastern Italy. It analyses the re-use and “domestication” of everyday public spaces, as a way of exploring how *bidesh* (foreign-land) space is transformed into a *shodesh*, home-like space. A parallel process of re-functionalization occurs in the private sphere. Different forms of cohabitation are put in place to deal with immigrants’ family-based needs, against deteriorating economic conditions.

The process is not without contradictions. For instance, family reunification allows men to recover an important component of their emotional universe, possibly healing the loneliness of migration. Reunited women, though, may experience their new home as an ambivalent place of solitude. Along these lines, the paper also highlights the gap between men’s and women’s views of “home” and “home-land”, in order to make sense of their evolving ways of “feeling at home”.

KEYWORDS: Bangladeshi diaspora, north-eastern Italy, gender, home-making, everyday life

## IZVLEČEK

### Dom med *bidesh* in *shodesh*: domestifikacija življenjskih prostorov, identiteta in spolne izkušnje v bangladeški diaspori

Članek se ukvarja s stanovanjskimi strategijami in spreminjanji življenjskih stilov bangladeškega prebivalstva v majhnem mestu v severovzhodni Italiji. Analizira ponovno uporabo in domestifikacijo vsakodnevnih javnih prostorov, da bi raziskal, kako je *bidesh* (tujina) preobrazena v *shodesh*, prostor domačnosti. Vzporedni proces ponovne uporabe poteka tudi v zasebni sferi. V vedno težjih ekonomskih pogojih zadovoljujejo družinsko usmerjene potrebe priseljencev različne oblike sobivanja. Proces ni brez protislovij. Na primer, ponovna združitev družine omogoča moškim, da okrepijo pomembno sestavino svojega emocionalnega sveta in pozdravijo osamljenost, ki jo povzroči migracija. Za ženske pa lahko združitev družine pomeni, da doživljajo svoj novi dom kot ambivalentni prostor samote. Članek osvetljuje tudi razliko v razumevanju »doma« in »domovine« med moškimi in ženskami, da bi lahko pojasnil razvoj njihovih načinov, kako »se počutijo doma«.

KLJUČNE BESEDE: bangladeška diaspora, severovzhodna Italija, spol, ustvarjanje doma, vsakodnevno življenje

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## HOME-MAKING AND FEELING AT HOME AWAY FROM HOME

An increasing number of sociological papers focus on the creation and transformation of domestic spaces by migrant populations.

Sometimes, this dimension of the migratory experience is analyzed by relating a wide set of home-making practices to the emotional construction of “feeling at home”. These practices range from mundane details such as furniture styles and the informal organization of living spaces, to large-scale trends such as the patterns of home ownership by migrant populations; the implications of the everyday construction of domesticity “away from home” and its imaginary signification are increasingly becoming the object of sociological studies (Boccagni 2013).

Home-making is a multifaceted experience and practice that shapes the meaning of dwelling and unfolds through different processes of spatial appropriation. Whether in search of short-term accommodation in foreign (often, hostile) settings or in the attempt to symbolically assert migrants’ background and heritage, a heterogeneous set of territory-making practices in different fields (Davis 2000; Hondagneu-Sotelo 2014) and re-functionalization dynamics revolve around domestic spaces (Boccagni and Brighenti 2014).

Some authors (Cingolani 2012; Scandolin 2012), for example, have explored how the home-making practices of migrant and subaltern populations show a strong symbolic investment, with which it seeks to counter the looming sense of insecurity in a deprived and disadvantaged and living context marked by impermanence and exploitation. In fact, an element that usually occurs in this field of studies is the dialectic between stabilization and temporariness (Bonomo and Marzorati 2012), between “feeling at home” and “feeling in exile” (Kusenbach 2014), the ambivalence of living in a “provisional permanent” (Sayad 1999).

Other scientific contributions have interpreted the home-making, investigating how the boundaries between public and private spaces are established, affirmed and transformed in the everyday life of migrants (Della Puppa and Gelati 2015; Minora 2012; Ostanel 2012). In this case, attention is focused on the worship places re-shaped and re-created by migrants. It is indeed important to look at the processes of symbolic and material appropriation of social spaces by migrants outside the house, but also at the dynamics of social and housing segregation within the urban spaces (Smets 2014) and the “effect of places” (Bourdieu 1993) on the migrants’ social trajectories. Interactions (and even conflicts) between natives and newcomers leads to an ongoing redefinition of (ethnic, identity, and relational) boundaries (Marzorati 2014).

This article, specifically, deals with the housing strategies and changing living styles of the Bangladeshi population in a small town in north-eastern Italy. The re-use and “domestication” of everyday public spaces – as a way of exploring how *bidesh* (foreign-land) space is transformed into a *shodesh*, home-like space – will be analyzed, as well as the parallel process of re-functionalization that occurs in the private sphere.

## METHODOLOGY

This article stems from a larger research project aimed at investigating the transformations of the masculinity, the gender construction in migration and the process of family reunification of immigrant men from Bangladesh in Italy (Della Puppa 2014a; Della Puppa 2014b).

Between March 2009 and April 2011, I conducted extended periods of ethnographic research in Italy (almost two years) and Bangladesh (over two months) and conducted 74 in-depth interviews in both poles of migration. This was preceded by an examination of quantitative data from the Statistical Office of the City of Montecchio Maggiore.

In Italy and elsewhere in Europe, I interviewed 25 immigrants who have rejoined their families in Alte Ceccato and 15 stakeholders; in Bangladesh, I interviewed 19 relatives of the respondents in Italy, 10 persons whose families have been affected by different experiences of migration and 5 stakeholders.

In Italy, the interviews were conducted in the language chosen by the interviewees, either English or Italian. In Bangladesh, the interviews were conducted in English, sometimes talking directly with the interviewees and sometimes through the help of an interpreter/translator from Bangla to English and vice versa. I have decided to present the words of the respondents without any modifications or corrections, to leave unchanged the small grammatical inaccuracies and the frequent use of words in Bangla.

To produce this article, the data have been integrated with several walk-about (Räthzel 2007), led by several Bangladeshi immigrants residing in Alte, in some parts of the town considered particularly significant by them and by me.

Finally, some superficial observations have been made in other places that are important hubs of the Bangladeshi diaspora.<sup>1</sup> In Italy, the Roman belt periphery, the urban area of Monfalcone (Gorizia), the area adjacent to the Mestre (Venice) train station and some neighborhoods of Marghera (Venice), and other towns of the Chiampo Valley (Vicenza), especially Arzignano. Elsewhere in Europe, the area of Tower Hamlet, in the East End of London, and the area surrounding the famous Brick Lane. During the trip to Bangladesh, it was used as an opportunity for brief encounters with Bangladeshi workers employed on construction sites and in luxury hotels in Jeddah, Saudi Arabia, and in contact with some of their compatriots in Europe.

## **ALTE CECCATO. FROM URBANISED LAND TO ITALY'S NORTH-EASTERN "BANGLATOWN"**

Alte Ceccato is a hamlet of Montecchio Maggiore, Province of Vicenza. Here, in the 50s, manufacturer Pietro Ceccato decided to construct a "company town" designed to house workers of his emerging industry: the Ceccato Spa and a hasty and messy expansion of houses, the number of which, from the very first housing construction in 1950, grew rapidly up to 229 units in only five years. In the decades following the death of the entrepreneur, blocks of flats were erected to house workers who migrated from other areas of the province and from the south of Italy.

The intensive traffic affecting the area, the difficulty in creating social spaces as well as the lacking renovation of many housing units resulted in a few years in a significant depopulation, highlighting a number of critical aspects of the irrational urban planning, not at all harmonious and left solely up to the private sector.

The hamlet thus started becoming a commuter area until it finally became a marginal centre lacking social life, a temporary accommodation and a place of passage in the industrial outskirts of a region that, in the meanwhile, was heading toward a dizzying economic growth (Della Puppa and Gelati 2015).

In the 80s, the industrial area of the Chiampo Valley actually continued flourishing, and tanning of hides and leather became its main productive activity. This area became the most important tannery district in Italy and perhaps in Europe. With a workforce composed of more than 50% immigrants, the Vicenza tannery district was responsible – until the economic crisis – for 1% of the Italian GDP, generating 20% of European and 70% of Italian production (3 billion euros per year).

1 In this article, the Bangladeshi migration has been defined in terms of a *diaspora*. For further information about this concept, see Brubaker 2005; Clifford 1997; Cohen 1997; Gilroy 1993; Hall 1990. For more information about the Bangladeshi diaspora in the world, see Kibria 2011. For a rapid insight in the specific segment of such diaspora in Italy, see Della Puppa 2014a; Knights 1998, Priori 2012; Zeitlyn 2006.

This productive system attracted large sections of the workforce from all over the country and abroad. This area and Montecchio Maggiore itself are, indeed, characterised by a high rate of immigrant residents (20%). In the village of Alte, non-Italian citizens represent about one third of its 6,804 inhabitants, 50% of whom are from Bangladesh (38% of whom are women).

The Bangladeshi community today represents the sixth largest non-European community in Italy, counting between 100,000 and 150,000 members (Priori 2012). Until the 90s, Bangladeshis were concentrated almost exclusively in Rome (92%) (Knights 1998), but within a decade different “Banglatowns” came into being in many local contexts, usually close to major industrial centres in northern regions (Morad and Gombač 2015), such as Alte Ceccato.

Despite its small size, Alte has gradually acquired such an importance for the Bangladeshi migration in Italy that in the colloquial constructions and in the everyday speech of the *probashi*<sup>2</sup> themselves, it is proudly referred to as to the “Bangla-Capital” of the province: “Alte is the capital, Alte is like a capital. Our capital. [...] We now say “Banglatown”.

It should be emphasized that one of the main factors crucial for the Bangladeshi settlement in Alte was the process of “familisation” that was characterized by an ever increasing number of family reunifications.

## STRATEGIES AND WAYS OF LIVING IN DIASPORA

Through an ethnographic look at the *probashi* houses, it is not difficult to imagine the lives of the working class families that had lived there four decades before the Bangladeshi settlement. The apartments and buildings reflected, in structure and interior design, the rules of aesthetics and organisation of the houses of Italy in the 1950s, responding to the needs of their new residents who were adapting them to their needs through new dietary, religious and social life practices.

These accommodations, clearly marked by time and wear and tear, were more accessible for the immigrant population thanks to their lower value assessments, and through the high rate of property acquisition, a synchronic process of increase and decrease in the value of residential properties. The intensity which shaped this transition together with the total lack of renovation affecting the neighbouring spaces immediately resulted in the creation of a speculative market in residential structures which by then had become residual and not very “attractive” for the native population. The initial disparity between rental costs and sales prices and easy granting of mortgages to immigrant borrowers who had been hired for an indefinite period by the tannery had encouraged a rapid turnover of tenants, which led to the consolidation of a dense and limited residential *enclave*. This resulted in a rigidly differentiated territorial distribution with a high level of immigrant residents gathered in the central area of the hamlet, contrasted with a decidedly lower number of non-Italian citizens further on along the new residential areas at the edge of the town. This form of residential segregation, which results today in 83% of the Bangladeshi population living in ten streets and representing an absolute majority in some of them, in addition to generating processes of the previously mentioned decrease and increase in value, produced a dual housing market based on the use of kinship and friendship networks:

There are two three Bengali persons, right? Always they search house: which houses sells who, which house I rent, in which house is free person, right? We call him... because I need house. All right you come, there is a house of my friend. Like an agency really! You understand? Like this... we don't go to agency.

(Tariq)

2 In the Bangla language, the “outside inhabitants”, those “who went out”, the “emigrants”.

You asked before why didn't go to agency. For example, you find a house directly from your friend, why go to agency? Why pay money to agency? I know you, you want rent your house. You don't want agency, you give me the house.

(Amin)

Integration of the data from the registry office and the ethnographic observations allows us to make an initial indicative classification of the *probashi* way of living in Alte Ceccato, often compromised by economic difficulties exacerbated by the economic crisis.

First, there is a major proportion (about 130 cases) of so-called "nuclear" families, composed of husband, wife and children living in their own houses or in rented houses.

Secondly, the presence of "extended" families was established, which includes the added presence of cohabiting family members bound by kinship ties. Usually it is the husband's younger brother, but there are also other types of family ties, still declined along the male line (in-laws, cousins, uncles, etc.). In these cases the real estate ownership rate is higher and reflects the more ancient migration style. It is also common to see a cohabiting person that does not seem to have any ties with the nuclear family. It is difficult to register this kind of situation in the registry and it is often attributable to temporary accommodation, irregular rents and temporary and unstable conditions, marked by forms of solidarity – or speculation – among fellow countrymen.

In addition, about 50 living spaces were identified in which different family units lived together. Most of them involve families who are not bound by any kind of relationship, however, raising teenage children, nowadays, is giving rise to households composed of different generations of the same family: parents, eldest son and his newly married wife with whom he was reunited. Here the rate of the purchased properties is very high, and this is due to the expenses related to the mortgage, which forces many family units to live together in this way.

Finally, there are cases where young unmarried male workers share the same household: approximately a dozen apartments displayed these characteristics, even if it is difficult to demonstrate the reliability of this data. It is related to a great extent to cohabitation between Bangladeshi citizens, but in some cases the apartment can also be shared among immigrants of different nationalities. In these situations the tenants are rarely the owners of the houses. These accommodations are often made available by Bangladeshis who are still residents or who have emigrated in the meantime.

Therefore, there is not a clear division between *households* (residential units which house a more or less extended family composed of more or less close relatives) and *bachelors' houses* (temporary accommodations and often overcrowded by unmarried workers or newcomers) (Pompeo 2011). Nevertheless, the existence of some elements could be noted (cohabitation of multiple family units, extended families living together, renting under the table and sublets, incidences of temporary irregularities) which are satisfactory for the mutual interest of single-income families and young precarious or unemployed newcomers.

This gives shape to the clientele logic and intra-community speculation dynamics emerging in the opacity of networks and fellow-countrymen social capital. Indeed, along with the situations in which the subletting, based on ties of friendship and solidarity, does not involve any profiteering, other situations emerge which are based on the drainage of disproportionate amounts of money from the pockets of roommates or tenants.

The secondary role here assumed by the bachelors' houses and, at the same time, the support function of the "owned houses", reflects the specificity of the *bidesh*<sup>3</sup> of Alte Ceccato: a secondary settlement with respect to Rome, representing a strong family stabilisation.

3 In the Bangla language the "foreign land", "foreign country", as opposed to Bangla-desh, "The country/land where Bangla is spoken". The latter would be the *shodesh*, i.e. "native land" or "motherland".

## NEW STYLES OF INHABITING URBAN SPACES IN ORDER TO FEEL AT HOME

The rooting of the new inhabitants, apart for having decisively contributed to combating social desertification and the demographic decline of the hamlet, led to a re-signification of its urban spaces and brought back a “primary dimension” of the “street and neighbourhood”. This way of living spaces and the territory of immigration is most pronounced in the central St Paul’s Square, the only town square and the heart of the Bangladeshi community social life.

What is sometimes represented as the “square of foreigners” is profiled as a “masculinised” area characterised mainly by the presence of Bangladeshi men. The latter are pushed to spend much of their time in public spaces due to the housing conditions experienced by many immigrant families of Alte Ceccato, where sharing the same apartment by multiple families represents a strategy for controlling expenditures. The domestic space becomes insufficient to satisfy the needs of all the tenants, thus pushing the male component (which in itself is the most entitled to engage in the public sphere) outside.

The slim possibilities of living in affordable houses that would be large enough push immigrants to pour into the squares, along the pavements and close to the shops run by fellow countrymen, which function as “relational knots”, crossroads of exchanges of information, decision-making centres, places of political debate and community affiliation (Ibid). It is especially in public spaces that fellow countrymen can meet without being obliged to use economic resources for consumption in bars and in public establishments – which also occurs but sparingly and prudently:

First thing we not go to the bar so much because we not drink and [so] here we discuss how life goes, where to find work, every group [associative] to hear about new laws [about immigration], what to hear, where is work place, where they need people, what problems at home, how things go in my country, what happen in politics, what government... Like this... Also just to talk with fellow countrymen.

(Samad)

Moving away from the town centre and heading towards the residential areas of town, places densely filled by mansions exclusively occupied by locals, one arrives at the only green area of the hamlet: Don Milani Park, renamed by the Bangladeshi people as “Burqa Park”, as it is regularly visited by veiled mothers who meet and accompany there their children to play.

This park is an intimate and secluded place, far away from the eyes of men. A space that is in contrast to the visibility and public nature (and thus potentially “inconvenient”, according to the cultural and religious construction which is socially represented as “traditional”, and intended to standardise the relations between the genders) of the square.

The “veiled” park is the only space used by the Bangladeshi population in this part of Alte. It is precisely thanks to its intimate isolation from the rest of the Bangladeshi community and from the male part of the community more “in sight” (concentrated at the square and in its adjacent streets) that the park becomes a “legitimate” place, in which the presence of women not accompanied by their husbands is acceptable and which can be frequented also by wives of immigrants paying more attention to the separation between genders and to a strict abidance by the rules of conduct designated by *pardah*.<sup>4</sup>

So, St Paul’s Square is the place where especially the Bangladeshi male population meets up and shows off, discussing the political life of their country of origin and exchanging information regarding the latest regulations on immigration in Italy or on employment opportunities in Italy, comparing their

4 Literally “veil” or “curtain”, referring to a set of incorporated practices that, in the Muslim world and the Indian subcontinent, contributes to the construction of “modesty”, “honor” and “shame” and preserves the separation, symbolic or material, of the genders and spheres of activity gendered through clothing, daily practices, the structuring of domestic environments, and physical segregation.



daily lives in diaspora and showing off their little sons in front of their compatriots. In Don Milani Park, it is possible to experience a strong differentiation of functions and uses depending on the different generational affiliation and gender of visitors. In the summer mornings and afternoons during the working days, mothers bring there their children to play; in the later hours, however, the park benches host card games between Bangladeshi adolescents; on Sundays, however, men organise barbecues and picnics for families, friends or associations. In both cases, such reconfiguration of the style of living in the hamlet reflects an attempt, put in place through the practices of everyday life by the *probashi* part of residents, to feel at home even in *bidesh*.

## LIVING THE DIASPORA. AN INTRA-COMMUNITY TOPONYMY IN ORDER TO FEEL AT HOME

The houses of immigrant families in Alte, as mentioned, are often composed of apartments in buildings built in the 50s for the workers of Ceccato. Among these blocks of flats the “White House” – one of the most dilapidated of these buildings – assumes particular importance. Its name is prompted by its colour and it is known among the whole Bangladeshi community in the province as a reference point for housing for the newly arrived countrymen, a first landing before undertaking a subsequent and gradual stabilisation.

In this apartment building, which is home to 98 Bangladeshi residents, including families which own the flats and young people living in rentals, there are currently 180 people from 12 different countries and 3 continents. They transform this space into a small window onto the world along the road of Alte Ceccato. The White House (officially called the “Monte Berico Apartment Building”) is characterised by incidents of overcrowding, unreported hospitality<sup>5</sup> and very high residential mobility (Della Puppa and Gelati 2015).

In similar buildings, the leaders of the Bangladeshi associations and leaders of interest groups act as providers, managing the rents of some accommodations occupied by fellow countrymen. Many owners of the apartments in the White House or in similar blocks of flats are *probashi* who, after living for years in Alte Ceccato, where they bought some property on the property market informally reserved for the immigrant population, moved to other diasporic settlement areas (usually in the UK) or returned to their country of origin. In both cases, they received income from the rents, representing an additional contribution for those who have extended their migratory path beyond the Channel or a considerable amount of capital to be collected on a monthly basis for those who returned to their homeland. At the same time, however, the White House represents for the Bangladeshi population from the oldest settlement an emergency and residual housing solution, thus carrying a social stigma and a symbolic devaluation of its residents (Bourdieu 1993).

The White House and the aforementioned Burqa Park constitute the main elements of a new toponymy that has transformed the spaces of Alte Ceccato and its activities. These activities have also helped to transform the significance of the places.

The *probashi* community contributes to the construction of the intra-community lexicon – i.e. simply renaming some places in the town in an original way – so as to be able to speak at the same time of themselves and the milieu, of the Bangladeshi community in diaspora and the context of the settlement in Alte Ceccato. Hence, in addition to the new names given to the “Monte Berico Apartment Building” and “Don Milani Park”, the two big buildings of the same height rising up in front of the White

5 That is to say, the people actually domiciled in the apartments rent them to fellow countrymen, who are not registered as residents at the registration office of the municipality of Montecchio Maggiore.

House become the “Twin Towers”, because of their symmetry and for their contraposition to the “White House”. The second building next to the White House is the “Red House”, while on the other side of the street stands the “Yellow House”. Finally, secluded on the outer side of the road dividing Alte Ceccato from Montecchio Maggiore – opposite the Bangladeshi kebab retailer, but mostly far away from the community public social life that is taking place mainly at St Paul’s Square – can be found the “Bottle Building”. At the feet of this building, the pavement is often littered with empty bottles because many Bangladeshis, often young bachelors or husbands who have not yet been reunited with their wives, meet in the evenings to consume alcohol. This practice is banned by Islam and formally stigmatised by the community in which the vast majority declares themselves Muslim.

This process of the redefinition of the places in the hamlet can be understood as an attempt to re-appropriate the settlement context. A strategy of readjustment of their everyday situation with respect to their needs of life, a way to “furnish” it with words, renaming it in a new way, in order to form a “habitat of significance” (Hannerz 1996) and to feel a little bit more at home. By narrating the world in which we live, in fact, it becomes tame – it is rendered domestic, it becomes *home* – and one takes care of some of its parts so that they become, even in the diaspora, familial, so that they do not provoke wonder or fear.

This is the direction towards which the new definitions of the places of Alte and the stories that are being exchanged among the Bangladeshi population about those places are heading, inasmuch as the familiarity is gained through the new shared language. It is possible to assume a common identity *inside* and *through* this language in a space that was unfamiliar, a perspective allowing the internalisation of the transition from the *shodesh* to a *bidesh* and transforming the *bidesh* in the familiar land.

At the same time, it is clear that the lexicon used by the *probashi* community to narrate their own context of life in order to make it “home” is rooted in a fictional English-speaking world towards which it is oriented. In Bangladesh, indeed, the language of the former coloniser is seen as a key to the world and, therefore, as a multiplier of the chances of success. In particular, English being the privilege of the educated middle-high class, it represents an unmistakable sign of social distinction. Hence, the process put in place by the Bangladeshi residents of Alte to recover, at least partially, the feeling of home in the diaspora constitutes a reaffirmation of their original social status in the country of origin and a form of symbolic resistance to the downgrading inherent in the south-north migration which they experience (Della Puppa 2014a).

## FEELING AT HOME IN ALTE CECCATO. A RIGHT DENIED?

The social vitality and the leading role played by the immigrant component of the population seem to clash, however, with the implicit desire of the “host” society and its political institutions. Even if they initially tolerated the presence of immigrants in the light of their “productive” function, they would prefer them to continue being invisible and discreet, with no needs and initiatives, and this even now when the “labour migration” has evolved into a “family settlement”.

The representation of the Bangladeshi presence as an element of concern has led to the implementation of a series of measures by local institutions. These measures have focused, among other things, particularly on the issue of housing.

The first project to be mentioned, although it was never completed due to the change in the administration in 2009, is “Montecchio Si-cura”. This project aimed mainly at resolving, according to its author’s definitions, the need of the “public health”, “security” and “order” of the native population with respect to the “occupation” of the houses and the public spaces by immigrants now too numerous in the eyes of the administration.

It was structured along two lines: the first one was oriented towards social and educational measures; the second one, which included the involvement of law enforcement, focused on the side of repression in order to preserve “urban safety”.<sup>6</sup>

The first set of activities has never been completed, and so only that part was fulfilled which provided for the expanding of the requirements for obtaining an approval of the suitability of accommodation for immigrant residents (and, hence, also for obtaining the permission for family reunification), the organisation of “widespread and repeated controls on the territory by the municipal police”, “an extension of the patrolling schedule”, and the creation of a detached section of the municipal police in Alte. The philosophy of the project or of the only component that has been developed and materialised, is best summed up by the statements of the then mayor:

It is well known that Alte, not only on the grounds of the traffic circulation and urban planning, but also on the grounds of the social fabric, is a different area from the rest of the country: it cannot be concealed that a large presence of non-EU immigrants represent problems in terms of civic order. [...] By conducting at least ten document checks per day, we give a strong signal: it is a clear message for illegal immigrants and criminals to stay out of Montecchio.

Thus, at the end of 2007, municipal police started to carry out night searches of homes and the Ulss 5 (Territorial Health Service) started conducting controls of the sanitary conditions of the apartments inhabited by immigrants. The controls were mainly concentrated in the central streets of Alte, on the one hand fuelling the distrust of the native population residing there and leading to a realisation that the context in which they live is problematic and besieged and, on the other hand, fear and a sense of insecurity among immigrants and a feeling of not “being at home” but of filling the role of “uninvited guests”.

In June 2009, the Municipality of Montecchio Maggiore experienced a radical change of administration: the previous municipal council was defeated by a handful of votes and replaced by a majority led by the xenophobic Northern League.<sup>7</sup>

The new administration has among its actions envisaged the removal of a part of the street furniture of the territory, which was socially built as a place of deviance, as a meeting point and a public space for socializing for immigrant residents (precisely the benches at in front of the White House); the installation of a camera system for video-monitoring in St Paul’s Square; narrowing access to the premises of the Muslim prayer room; the interruption of the provision of the “canteen service” at schools for (almost all immigrant) families who cannot provide for the payment of fees; an ordinance that, for drafting and dissemination of notifications or publications by individuals, groups or associations addressed to the population in a language other than Italian, a translation into Italian must be delivered to the mayor’s offices one week in advance; further enlargement of the housing requirements for obtaining approval of the suitability of accommodation, residences and, once again, the renewal of residence permits and authorisations for family reunification.

These measures were followed by numerous controls – more than 200 according to figures provided by the municipality – which, as a result of the new parameters, were carried out night and day in the private homes of many residents of Bangladeshi origin (even residents with formal Italian citizenship and passports) according to a well-defined *ethnic profiling*. The result of this was a situation of widespread discrimination and a climate of insecurity. In this way many immigrant residents are dispossessed of the opportunity to use their real estate and to become homeowners (or to pay the instalments of the loan for their purchase) that will turn out to be “unfit” to accommodate all the members of

6 “Montecchio Si-cura” is a pun in Italian and refers to two directions along which it should be structured: that of “security” (“sicura”, meaning safe in Italian) and that of “taking care” (“si cura”) of its municipality.

7 Election results also reconfirmed in 2014.

the reunited family. The municipal resolutions on housing draw legal and symbolic borders inside the homes of immigrant families, establishing who is entitled to live and enjoy those spaces and who does not have the right to feel at home, and outlining a citizenship stratified with respect to “ethnic” categories, “cultural-linguistic” categories and categories of national origin (Benhabib 2003; Morris 2003) and access to the rights to variable geometry (Zagato 2007).

## THE HOUSE IN THE DIASPORA, “A HAVEN IN A HEARTLESS WORLD”...

The first generation of *probashi* in Italy, to which many Bangladeshi residents of Alte belong, was composed almost entirely of men, often unmarried: urban middle-high class young men or rural well-off family members. Family reunifications characterising the first phase of the Bangladeshi diaspora in Italy are, thus, configured exclusively as “masculine” reunifications and of “second degree” or “newly formed” (Tognetti Bordogna 2005). This definition refers to the situation where the first generation migrant, after setting up the necessary conditions, returns to the country of origin to get married, most of the time via an arranged marriage with an often unknown woman who, soon after the wedding, re-joins her husband in immigration. It should also be clarified that in order to implement their wedding projects, the migrants must abide by time constraints resulting from work commitments, using their own holidays. This means that as soon as the marriage is celebrated, they must return to Italy, where they are called to clock in at the workplace (Della Puppa 2014a) and wait for the processing of the paperwork necessary for the reunion. One of the main drives for reunification is the need of “emotional stability” of the first generation immigrant men, their willingness to create and foster an emotional sphere also in the context of immigration.

Reduced to mere labour for factories in the district, over the years migrants start to feel the weight of the lack of an everyday family life and domestic warmth, emotional loneliness and boredom that accompanies the “free” time inside and outside their homes:

My life, before was different: I was alone here. When your family is far from you, in another country like Bangladesh, and you're here, you can't see them... I can't speak with my wife, I can't affection at her. I was always alone. I was unhappy, I had mental frustration: “When she will come here? When she will come here?” [...] I married about ten years ago and still now I cannot bring her here. So many tensions created in my mind.  
(Mukul)

For migrants alone in Italy, the everyday life prior to the reunification is remembered as irregular, chaotic, compromised by a sense of temporariness and insecurity related to the absence of an emotional reference by their side, the impossibility of a routine marked by constraints, timetables and family responsibilities; an existence more resembling survival than living. In addition, the disorganisation of the domestic sphere that characterises their housing conditions exacerbates their sense of existential loneliness and their feeling of being “provisional” and “temporary”:

My life changed a lot. Before... always out talking to friends. Now I must arrive home soon because she alone waiting me, I must come back, go out together. Day working, evening going out. Before I was eating eight, nine, ten, eleven o'clock, no problem. Now, twelve o'clock lunch, eight o'clock dinner. Arranged. Settled. Stable.  
(Rahaman)

Life needs stability, I need calm life. If I live with friends, in his house, not OK, I don't like it. Before, I didn't have my house, I don't like to be with other people. Not regular. I like regular life, but I lived with other people. Like in one room many people, me and my friends. Life with mess not good for me, now OK.  
(Hassan)

The desire to reunite also arises from the need for daily organisation and conciliation between time of productive and reproductive work, from the thrust towards an adjustment of the daily lived *routine* to the ideal model of domestic and family planning, and economic and work planning:

For me a family, a house, is a fantastic thing! You come home after work and wife arranges to keep house. For example when I was alone, I must clean house, I cook, doing everything me. But now I come home and my wife keeps house, arranges everything, a bit for me...it is like a surprise every day!

(Sherif)

After the reunification the domestic sphere finally becomes a space for relaxation and recreation. The time outside working hours allows for moments of uncommon "normality" and re-joined husbands begin to feel at home even in Alte Ceccato.

### **...OR A GOLDEN CAGE AND ALL-ABSORBING PLACE?**

For a re-joined woman, however, migration to Italy following her new husband can be understood as a continuation – in a transnational space – of her transition from the family group of the father to that of the husband (and/or of the father-in-law), as it is enshrined in the marriage accomplished in accordance with the virilocal rule generally applicable in Bangladesh. This interfamily shift – and now also intercontinental – allows them to "build new families with small pieces of the previous ones, which therefore had to be broken" (Lévi-Strauss 1952: 175).

The wife, after living the shock of migrating from her living and family context, has to face the trauma of migration for reunification purposes. The women may become variously destabilised after arrival to Alte: their migration overlaps with a time of major transition due to multiple changes of *status* and sudden changes in the social, family and living environment, causing pain and disorientation, loneliness and suffering:

On 26 August 2006 I arrived in Italy. That day was very sad in my life: I had to leave father, mother, sister, brother, grandfather, grandmother, cousins, all the things that I liked. I never wanted to stay in Italy too long, but... I happened to be in Italy. Italy is a new country, without my friends, I've never been with my husband for more than a month. [...] I attended a new school to learn Italian. But I always want to go back to Bangladesh, to go to school with my friends. When I came to Italy I realised that my life had changed so much.

(Rokeya)

When she came, first two years she didn't want to stay here, she used to tell me: "Send me in Bangladesh, send me back!" I was trying to let her understand: "If I need money to live, I have to work here. So if I have to work and to live here, you will stay here". So after that, little by little, she became to understand. [...] She missed Bangladesh too much; I think more than me, every time she was telling: "Send me back, send me back". This is the situation.

(Jahan)

To fully understand the condition of the reunited wives in Alte, it is necessary to linger over some aspects.

In the country of origin, women were spending their days within the relational context of the enlarged family of the absent husband. On the one hand, this may lead to the subordination to the power of the mother-in-law, the sisters-in-law and, more generally, of the other family members; on the other hand, her husband's family can provide the bride with a dense relational network and not necessarily a segregated one: the women of the household may, in fact, become bound by ties of trust and complicity. The rigid hierarchy among the members of the family of origin of the husband,

the control and oppression to which the young daughter-in-law would be subjected, can coexist and become reconciled by means of bonds of solidarity, domestic warmth and family protection.

So, once in Alte Ceccato, for the reunited women, the vivacity of family ties and familiarity of the environment of origin may give way to the thinning out of social networks and the solitude of a yellowish room or a dilapidated apartment where young brides suddenly have to live with a husband who is a complete stranger or with whom there was no way and no time to build intimacy. The same husbands describe the suffering of the wives that, after being alone throughout the day, they may have only a few moments in the company of the spouse who

comes home exhausted after the endless work shifts:

In Bangladesh she lived one type of life, but in Italy she has to live another one: husband works all day, in the night or in the evening he comes back home and he's too much tired, after dinner he go to bed and the woman feel a little frustrate. Frustration, because her time is just passing: husband working all day, evening he takes food and go to bed, woman in all day at home, she feels problem to pass her time until night when come husband, perhaps one hour they meet each other, than husband go to bed and women nothing to do.

(Reevu)

Alte Ceccato – an orthogonal grid of streets upon which loom large apartment buildings scarred by the ravages of time, the dormitory appendix of the biggest Italian tannery district, nowadays in decline as well – certainly does not correspond to the ideal of modern and cosmopolitan Europe described by migrants returning to Bangladesh or represented by images of the UK satellite channels which, however, refer to London.

So, the reunited women are forced to see the real face of the migration and unveil the lies, omissions and ostentations that reproduce illusions about the land of immigration in the country of origin (Sayad 1999). This misconception concerns the living and social context of the integration of the first generation immigrants and their wives, but also the downgrading, the exclusion from work and the difficult socio-material conditions experienced by them:

Before coming here I didn't think that life here wasn't easy, I thought it would be different. I heard my cousins who work in America and in England, they work in the office because they have studied, there can be found good work, while in Italy it isn't so. Although I studied, it is not easy here. It is difficult that someone would accept me to work in the office, even though I speak English very well, because I am a foreigner and, therefore, no one will give me a work as a shop assistant or in the office. When I think that my job is to clean, I feel bad because in Bangladesh I would never have to do this job never, never, never... I did not expect this life.

(Razeeta)

The "family" migration transfers onto wives the same bitter disappointment that the husbands also experienced at the time of their arrival in Italy. From educated daughters of the Bangladeshi upper middle class, used to the comfortable life and to the prestige of their social position, they suddenly happen to be wives of unskilled workers, on the bottom rungs of the civic stratification, confined in cold apartments in a neighbourhood among factories. They are immersed in an urban and socio-territorial environment and into a life they will have more difficulties getting used to than their husbands, and more difficulties perceiving as a space within which they can feel at home.

## CONCLUSIONS

From the arrival of hundreds of young male workers previously employed in different urban contexts in the Italian peninsula, in order to reach a gradual “familiarization” of the immigrant component, Alte Ceccato has established itself as a territory of immigration. Despite its small size it welcomed a high-impact social transformation that has helped to change, with its resident population, the image of the hamlet, its public and private spaces, styles and forms of living these spaces and make them “home”.

Hence, the hamlet presents itself as a case study to illustrate the transformations whose protagonists are the “little local contexts” as a result of the intensive settlement of migrant populations, with the inevitable conflicts that ensue. But, above all, it constitutes a socio-territorial tissue which is almost ideal-typical for observing the processes of symbolic and material reusing and recycling of urban and domestic spaces and for seizing the practice of readapting the context of life adopted by the immigrant residents, in order to create the conditions in which they can feel at home in the diaspora.

Examples of the reported re-signification and renaming of places confirm these trends: unknown to the indigenous population, they represent a clear sense of belonging, imprinting a strong identity value to the frequented spaces and contributing to the symbolic “domestication” of the life context, redesigning an original map through which a culture of living gives voice to its inhabitants.

At the same time, the housing strategies and the strategies for coping with criticality adopted by the immigrant population are not without contradictions, and reflect, through the risk of social withdrawal in the community, barriers and already existing problems. This refers not as much to the examples of such coexistence between different families – the only way to cope with the costs of a mortgage taken out with difficulty, but partially unsustainable – as to the speculative actions of informal housing networks that sometimes result in the reproduction of dividing elements and dynamics of dispute within the community.

Within this scenario, access to public space turns out to be an absolutely crucial factor. Indeed, the new face of the locality became more visible in St Paul’s Square and in its adjacent streets, and that is also where the immigrant population lives and transforms the territory, making it (also) its own territory. At the same time, however, it is always in the central square of the hamlet – and to a lesser extent in the green area of Don Milani Park – that the functions for which those spaces were originally designed are re-emerging, and sometimes even their inadequacy with respect to today’s new social needs.

The limits arising again in this way are intertwined with the dynamics typical for the Bangladeshi diaspora and the experience of setting up a family in the migration context, leading to the emergence of new contradictions in the present. If for the first-generation immigrant men, in fact, family reunification allows them to regain an important component of their emotional universe, acting as an antidote to the suffering and loneliness of migration, for the reunited women it can be configured as a symbolic violence (Bourdieu 1998) that forces them to leave their relational network and to be subjected to an often unsatisfactory context. So, if for Bangladeshi husbands the domestic sphere represents the centre of the affections, a privileged space for recreation and regaining a part of their own family dimension, for their wives the perimeter of the house can turn out to be a more or less golden prison and a place of solitude.

This plurality of modes of living in the diaspora implemented by migrants and their families, therefore, highlights the gap between male and female perception with regard to the representations of “home” and “homeland” and the clash between different styles of feeling at home.

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## POVZETEK

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### DOM MED *BIDESH* IN *SHODESH*: DOMESTIFIKACIJA ŽIVLJENJSKIH PROSTOROV, IDENTITETA IN SPOLNE IZKUŠNJE V BANGLADEŠKI DIASPORI

Francesco DELLA PUPPA

Vedno večje število socioloških razprav se ukvarja z ustvarjanjem in preoblikovanjem domačih prostorov migrantskega prebivalstva. Včasih je ta razsežnost migracijske izkušnje analizirana preko soočenja raznovrstnih načinov ustvarjanja doma z emocionalno konstrukcijo »počutiti se doma«. Članek se ukvarja s stanovanjskimi strategijami in spreminjanji življenjskih stilov bangladeškega prebivalstva v majhnem mestu v severovzhodni Italiji v kontekstu velike koncentracije priseljencev in politike nativizma: Alte Ceccato je del Montecchio Maggiore, provinca Vicenza. Za to področje in za Montecchio Maggiore je značilna visoka stopnja priseljenega prebivalstva (20 odstotkov). V naselju Alte predstavljajo neitalijanski državljani tretjino od 6804 prebivalcev, od tega jih je polovica iz Bangladeša in med njimi je 38 odstotkov žensk.

Članek analizira ponovno uporabo in »domestifikacijo« vsakodnevnih javnih prostorov, kot so trgi in parki, da bi raziskal, kako je *bidesh* (tujina v jeziku bangla) preobražena v *shodesh*, prostor domačnosti. Vzporedni proces ponovne uporabe poteka na zasebni ravni, saj postajajo domači prostori in procesi ustvarjanja doma odločilni za preživetje migrantske skupnosti. V vedno težjih ekonomskih pogojih zadovoljujejo družinsko usmerjene potrebe priseljencev različne oblike družinskega sobivanja in rekompozicije. Proces ni brez protislovij. Na primer, ponovna združitve družine omogoča moškimi, da okrepijo pomembno sestavino svojega emocionalnega sveta in pozdravijo osamljenost, ki jo povzroči migracija. Za ženske pa lahko združitve družine pomeni, da doživljajo svoj novi dom kot ambivalentno »zlato kletko« ali kraj samote. Članek osvetljuje tudi razliko v razumevanju »doma« in »domovine« med moškimi in ženskami, da bi lahko pojasnil razvoj njihovih načinov, kako »se počutijo doma«.

# RECIPROČNOST ALI SIMETRIJA? PRIMERJAVA KULTURNIH INTERESOV IN MOŽNOSTI DVEH MANJŠIN

Janja ŽITNIK SERAFIN<sup>1</sup>

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## IZVLEČEK

### **Recipročnost ali simetrija? Primerjava kulturnih interesov in možnosti dveh manjšin**

Prispevek povzema primerjavo kulturnih interesov in možnosti slovenske manjšine v BiH in ene največjih etničnih manjšin v Sloveniji, namreč Bošnjakov. Članek je rezultat empirične raziskave, ki je med drugim obsegala anketo med slovenskimi društvi v jugoslovanskem prostoru, intervjuje s tamkajšnjimi učitelji slovenskega jezika in kulture ter intervjuje s sekretarjem Bošnjaške zveze Slovenije in s predsednikom Zveze slovenskih društev v BiH. Avtorica kombinira kvalitativno obravnavo in interpretacijo rezultatov terenske raziskave s statistično primerjavo nekaterih demografskih vidikov in stopnje samoorganiziranosti obeh izbranih manjšin.

**KLJUČNE BESEDE:** Slovenci v Bosni in Hercegovini, Bošnjaki v Sloveniji, manjšinski status, kulturne dejavnosti, kolektivne pravice

## ABSTRACT

### **Reciprocity or Symmetry? A Comparison of the Cultural Interests and Possibilities of Two Minorities**

The paper summarises a comparison of the cultural interests and possibilities of the Slovene national minority in Bosnia and Herzegovina and one of the largest ethnic minorities in Slovenia, the Bosniaks. The article is a result of empirical research which included a survey of Slovene cultural societies in the countries of the former Yugoslavia, interviews with teachers of Slovene language and culture in these countries, and interviews with the secretary of the Bosniak Association of Slovenia and the president of the Association of Slovenian Societies in Bosnia and Herzegovina. The author combines a qualitative assessment and interpretation of the fieldwork results with a statistical comparison of certain demographic aspects and the degree of self-organisation of the minorities in question.

**KEY WORDS:** Slovenes in Bosnia and Herzegovina, Bosniaks in Slovenia, minority status, cultural activities, collective rights

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## UVOD

O recipročnosti manjšinskih pravic največkrat govorimo v povezavi z narodnimi manjšinami v dveh sosednjih ali bližnjih državah.<sup>1</sup> Vzroke, ki so skozi zgodovino mednarodnih migracij rodili potrebo po urejanju manjšinskih pravic na temelju recipročnosti tudi v primerih, ko ne gre za narodne manjšine v sosednjih državah, med drugim obravnava Leslie Page Moch (1992: 161–174) in Klaus Bade (2005: 279–311), Drnovšek in Kalc (2014: 92) pa njune ugotovitve takole povzemata:

V odnosu do migracij in migrantov je postalo značilno, da so države samovoljno regulirale pravico izseljevanja in priseljevanja v skladu z lastnimi interesi, da so diskriminirale med lastnim delavstvom in priseljenim ter da so si prizadevale zagotoviti svojim izseljencem to, kar niso bile pripravljene priznati tujim priseljencem.

Seveda to velja še danes, kar poudarja npr. Ribičič (2014: 189), ko pravi: »Pripadnikom večinskega naroda je težko razumeti položaj manjšinskih narodnih skupnosti in njihovih pripadnikov. Veliko lažje razumejo položaj »svojih« narodnostnih skupnosti in njihovih pripadnikov, ki kot manjšinci živijo v tujini.« Prav zato lahko soočenje položaja enih in drugih prispeva k senzibilizaciji nacionalne večine (vključno s tistim delom stroke, ki ji pripada) glede potreb in interesov manjšin, s katerimi si delijo skupno državo, posledično pa tudi k zrcalno primerljivim političnim rešitvam.

V tem članku bom poskušala medsebojno primerjati organiziranost, položaj in kulturne interese slovenske manjšine v BiH in ene največjih etničnih manjšin v Sloveniji, namreč Bošnjakov. Namen članka je oceniti, v kolikšni meri obstoječe stanje narekuje upoštevanje načela recipročnosti oziroma simetrije<sup>2</sup> pri urejanju manjšinskih pravic enih in drugih, zlasti na področju kulture. Članek je rezultat terenske raziskave, ki sem jo vodila v letih 2012–2014.<sup>3</sup> Empirična raziskava je obsegala anketo med slovenskimi društvi v jugoslovanskem prostoru (Anketa ISIM 2012), strokovne posvete, opazovanje z udeležbo, intervjuje z učitelji dopolnilnega pouka slovenskega jezika in kulture v jugoslovanskem prostoru, intervjuje z nekaterimi predstavniki tamkajšnjih slovenskih društev in zvez društev, pisni intervju s sekretarjem Bošnjaške zveze Slovenije Admirjem Baltićem in intervju s predsednikom Zveze slovenskih društev v BiH Darkom Mijatovićem – obema se še posebej zahvaljujem za sodelovanje. Svojo kvalitativno obravnavo in interpretacijo rezultatov terenske raziskave v tem članku kombiniram s kvantitativno metodo, in sicer s statistično obravnavo demografskih vidikov in organiziranosti obeh izbranih manjšin.

O vprašanju recipročnosti pri urejanju manjšinskih pravic v jugoslovanskem prostoru piše Vera Kržišnik Bukić (2014a: 134):

Primerjava položaja novo nastalih narodnih manjšin v vseh državah naslednicah, kot logične in pričakovane družbene posledice razpada skupne države, naj bi načeloma avtomatično odprla vprašanje recipročnosti urejanja manjšinske problematike v vseh in v vsaki med njimi. Toda do recipročnega urejanja manjšinske tematike med novo nastalimi državami ni prišlo.

1 Npr. Josipovič, Kržišnik Bukić 2010; Pahor 2011.

2 Raba tega pojma bo pojasnjena v nadaljevanju.

3 Gre za terensko raziskavo v okviru humanističnega dela temeljnega raziskovalnega projekta »Poklicne migracije Slovencev v prostor nekdanje Jugoslavije: Od naseljencev do transmigrantov (2011–2014), bilateralnega projekta »Pomen kulturne produkcije Slovencev v BiH in pripadnikov narodov BiH v Sloveniji« (2014–2015), ki ga Inštitut za slovensko izseljenstvo in migracije ZRC SAZU izvaja skupaj s Filozofsko fakulteto Univerze v Zenici – oba je sofinancirala Javna agencija RS za raziskovalno dejavnost, ter projekta »Ohranjanje slovenstva med mladimi člani slovenske skupnosti v jugoslovanskem prostoru« (2013), ki ga je sofinanciral Urad Vlade RS za Slovence v zamejstvu in po svetu.

Avtorica nadalje pojasnjuje, da je bil zlasti znan predlog Republike Hrvaške o bilateralno-recipročnem priznanju slovenske manjšine v RH in hrvaške manjšine v RS, a Slovenija predloga ni sprejela.<sup>4</sup> Z ustavo Republike Hrvaške iz leta 1991 je bil Slovincem namreč dodeljen status narodne manjšine, z ustavnim zakonom iz leta 2002 in drugimi predpisi pa je njihov manjšinski položaj načelno tako dobro urejen, da vseh svojih normativno zagotovljenih pravic niti ne zmorejo dejansko uresničevati (Kržišnik Bukič 2014a: 134–135). Bosna in Hercegovina je v t. i. »daytonski ustavi«, ki je vzpostavila dominacijo treh konstitutivnih narodov, uvrstila tamkajšnje Slovence v skupno etnično kategorijo »ostalih«, a so pozneje v Zakonu o zaščiti prava pripadnika nacionalnih manjina u Federaciji Bosne i Hercegovine iz leta 2003 tudi Slovenci izrecno imenovani kot narodna manjšina v BiH (prav tam). Podobno kot na Hrvaškem in v BiH imajo tudi Slovenci v Srbiji priznan in urejen status narodne manjšine,<sup>5</sup> medtem ko ga pripadniki narodov iz teh držav v Sloveniji nimajo.<sup>6</sup> Kljub temu je recipročna zaveza k ohranjanju jezika in kulture narodnih manjšin sestavni del vseh bilateralnih sporazumov med državami naslednicami nekdanje SFRJ in Slovenijo, ki se nanašajo na znanost, kulturo in izobraževanje; vprašanje pa je, ali je dovolj poskrbljeno za nadzor nad uresničevanjem teh dogovorov (prim. Komac 2014: 120).

Bošnjaki v Sloveniji si skupaj s pripadniki drugih jugoslovanskih narodov v Sloveniji prizadevajo za ustavno priznanje statusa narodne manjšine, predvsem v okviru Zveze zvez kulturnih društev narodov in narodnosti nekdanje SFRJ v Sloveniji, ki deluje od leta 2003. 1. 2. 2011 je bila v Državnem zboru RS sprejeta Deklaracija RS o položaju narodnih skupnosti pripadnikov narodov nekdanje SFRJ v RS, še istega leta pa je bil na podlagi deklaracije ustanovljen Svet za vprašanja narodnih skupnosti nekdanje SFRJ v Sloveniji (Dimitrievski 2014: 17–19). Predsednik Zveze zvez poudarja, da pripadniki nepriznanih manjšin ne morejo pristajati na status »prišlekov«, ker so v resnici produkt razpada skupne države, in nadaljuje:

Ocenjujemo, da je (ustavno) priznanje statusa manjšine ključni pogoj za pripravo drugih zakonskih in podzakonskih aktov za uveljavljanje posebnih kolektivnih pravic pri ohranitvi jezikov, kulture, dostopa do javnih medijev, politične participacije in dostojanstva naših skupin državljanov v Republiki Sloveniji. Danes v Sloveniji deluje blizu sto kulturnih društev, ki programsko aktivno podpirajo ohranitev kulturne dediščine pripadnikov konstitutivnih narodov nekdanje skupne države (prav tam).

Slovenska stroka ima o tem neenotno stališče. Nekateri avtorji ustavno priznanje manjšinskega statusa teh skupnostim podpirajo, drugi so glede tega previdnejši ali pa takemu priznanju nasprotujejo (prim. različna stališča avtorjev v Kržišnik Bukič, Josipovič 2014 ter v Kržišnik-Bukič 2014b), celo nekaterim pripadnikom teh manjšin ali njihovim potomcem se zdi sprememba ustave nepotrebna (npr. Goranu Vojnoviču v Milharčič Hladnik 2014: 90–91). Pa vendar predlog podpirajo mnogi ugledni poznavalci manjšinskih vprašanj, med drugim komisar Sveta Evrope za človekove pravice dr. Nils Muiznieks (v Kržišnik Bukič 2014b: 10–11) in direktor Inštituta za ustavno pravo dr. Ciril Ribičič (2014: 199).

V raziskavi me je zanimal predvsem kulturni položaj obeh manjšin, ki sem ju (tudi v skladu s temo odobrenega bilateralnega projekta z BiH) izbrala za primerjavo. Ob tem se mi je odprlo vprašanje, ali bi bilo pri urejanju manjšinskih pravic v primeru Slovencev v BiH in Bošnjakov v Sloveniji primernejše upoštevati načelo recipročnosti ali pa bi jih morali urejati na temelju »simetrije«, kot naj bi jo pojmoval

4 Obširnejšo obravnavo tega vprašanja najdemo v Josipovič, KržišnikBukič (2010: 142–146).

5 Na Hrvaškem in v Srbiji imajo Slovenci zagotovljeno tudi zastopstvo v državnem parlamentu (Ribičič 2014: 197).

6 Berishaj (2014: 48) takole pojasnjuje, zakaj Slovenija pri vprašanju manjšinskega statusa ne upošteva načela recipročnosti: »Pojmu avtohtonosti je del slovenskega »etatističnega družboslovja« dodelil koncept »predpravice«, saj so avtohtone narodne skupnosti (manjšine) vključene v Ustavo RS. Ustave pa se ne sme dotikati, saj bi po tej logiki moralo omenjeno družboslovje kloniti pred novo percepcijo kolektivnih svoboščin ...« V opombi dodaja, da bi bila za zgled lahko Hrvaška in njen odnos do nacionalnih manjšin (Hrvaška priznava 22 manjšin). Vendar si slovenski teoretiki, pravi avtor, o tem ne upajo razmišljati, »saj bi v trenutku, ko bi redefinirali manjšine, njihov celotni »znanstveni opus« postal vprašljiv!«

npr. nekdanji italijanski predsednik Giorgio Napolitano. Ta je med obiskom Slovenije poleti 2012 namreč poudaril, da je vprašanja slovenske manjšine v Italiji in italijanske v Sloveniji treba reševati »v duhu simetrije« (Tence 2012). V poročilu o tem je v nadaljevanju pojasnjeno:

Simetrija [...] se nanaša na iskanje enakosti v različnih predmetih, v tem primeru različnih situacij obeh narodnih manjšin. Nekaj povsem različnega od recipročnosti, ki je povezava z enakim oziroma ustreznim; če komu nekaj daš, moraš dati tudi drugemu, če komu nekaj vzameš, moraš nato tudi drugemu nekaj odvzeti. Pojem recipročnosti je uveljavljen pri mednarodnem obravnavanju narodnih in jezikovnih manjšin, ni pa nujno, da je to nekaj dobrega in pozitivnega (prav tam).

Simetrija v kontekstu manjšinskih pravic ni znanstveni pojem in tudi v politični terminologiji meddržavnih sporazumov še ni našla svojega mesta. Vsekakor pa – vsaj po zgornji razlagi – implicira manj rigoroznosti kot načelo recipročnosti in večje upoštevanje razlik med državama sopodpisnicama kot tudi med med specifikami, značilnimi za položaj in potrebe manjšin, ki so predmet dvostranskih sporazumov.

## PRIMERJAVA OBEH MANJŠIN V ŠTEVILKAH

### Slovenci v BiH

Število Slovencev v BiH, sodeč po tamkajšnjih popisih prebivalstva, od leta 1961 konstantno upada (tabeli 1 in 2).

Tabela 1: Slovenci v BiH po popisih 1961–1991

Popis 1961	Popis 1971	Popis 1981	Popis 1991
5.939	4.053	2.755	2.190

Vir podatkov: *Statistički godišnjak* (2013: 69)

Vendar primerjava med številom popisno opredeljenih Slovencev v BiH in številom članov tamkajšnjih slovenskih društev pokaže, da je v BiH več Slovencev, kot pa se jih za to narodnost opredeljuje v popisih (Josipovič 2014: 217). Na drugi strani pa skoraj trikrat bolj množično članstvo v društvih odraža dejstvo, da so v slovenska društva včlanjeni tudi pripadniki drugih narodov v BiH (tabela 2).

Tabela 2: Popisno opredeljeni Slovenci v BiH in članstvo v slovenskih društvih v BiH

	Število Slovencev v BiH 2011–2013*	Članstvo v slovenskih društvih**
BOSNA IN HERCEGOVINA	1.100	3.083
Federacija BiH	500	1.376
Republika Srbska	600	1.707

\* Vir: Josipovič (2014: 217) \*\* Vir: Anketa ISIM (2012)

Če podatke iz tabele 2 primerjamo s podatki iz tabele 3, vidimo, da je tolikšno nesorazmerje med popisnim številom pripadnikov slovenske manjšine in številom članov slovenskih društev (v korist slednjega), če se omejimo na jugoslovanski prostor, značilno samo za BiH. Število članstva v slovenskih

društvi presega popisno število Slovencev le še v Srbiji in Makedoniji, vendar gre tam za neznatno razliko. Ta slovenski unikum v BiH si lahko razlagamo z dejstvom, da je interes za študij in delo v Sloveniji od obravnavanih držav še vedno največji v BiH ter da se za pridobitev slovenskega državljanstva na osnovi slovenskega porekla med drugim upošteva tudi potrdilo o aktivnem članstvu v slovenskem društvu.

Tabela 3: Slovenci v drugih državah naslednicah SFRJ in članstvo v slovenskih društvih

Država	Število Slovencev ob zadnjem popisu (2011–13)*	Članstvo v slovenskih društvih (2012)**
Hrvaška	10.517	6.047
Srbija	4.033	4.302
Kosovo	500	-
Črna gora	354	66
Makedonija	300	301

\* Vir: Josipovič (2014: 217) \*\* Vir: Anketa ISIM (2012)

## Pripadniki narodov BiH v Sloveniji

Statistični podatki o številu oseb s prvim bivališčem v drugih republikah/državah jugoslovanskega prostora, ki so se do leta 2001 priselili v Slovenijo, kaže na to, da je največ takšnih oseb prišlo iz BiH: kar 67.670 od skupno 150.763 priseljenih iz jugoslovanskega prostora (tabela 4).

Tabela 4: Priseljenci v Slovenijo iz BiH, 2002 (po letu priselitve)

do 1940	1941–52	1953–60	1961–70	1971–80	1981–90	1991–2001	skupaj do 2001
138	1.058	2.227	7.842	26.227	17.517	12.661	67.670

Preračunano po podatkih iz: SURS, Popis 2002, Slovenija, Prebivalstvo po letu priselitve, državi prvega prebivališča in spolu.

Med priseljenimi iz BiH (t. i. prva generacija) so bili najštevilčnejši Bošnjaki (13.876 oseb), Muslimani (6.332 oseb), Bosanci (5.869 oseb), Hrvati (7.120 oseb), Srbi (15.612 oseb) ter neopredeljeni, neznani in tisti, ki niso želeli odgovoriti (skupaj 14.639 oseb).<sup>7</sup> Če v zadnjem klasičnem slovenskem popisu prebivalstva opredeljenim Bošnjakom (21.542 oseb) prištejemo vsaj del tistih, ki so se opredelili kot Muslimani in Bosanci, kar argumentirano zagovarja Baltić (2009: 25–26), dobimo skupino prebivalcev (priseljenih in njihovih potomcev) z mnogimi skupnimi značilnostmi, ki šteje do 40.000 pripadnikov (tabele 4–6).

Tabela 5: Muslimani (kot etnična opredelitev) v Sloveniji po popisih 1953–2002\*

Popis 1953	Popis 1961	Popis 1971	Popis 1981	Popis 1991	Popis 2002
1.617	465	3.197	13.339	26.577	10.467

\* Popisnih opcij Bošnjaki in Bosanci za obdobje pred letom 2002 ni.

Vir podatkov: SURS, Popis 2002, Slovenija, Prebivalstvo po narodni pripadnosti

7 SURS, Popis 2002, Slovenija, Prebivalstvo po narodni pripadnosti, državi prvega prebivališča in spolu.

Tabela 6: Opredeljeni kot Bošnjaki, Muslimani in Bosanci v Sloveniji, 2002

Bošnjaki	Muslimani	Bosanci*	Skupaj
21.542	10.467	8.062	40.071

\* regionalna opredelitev

Vir podatkov: SURS, Popis 2002, Slovenija, Prebivalstvo po narodni pripadnosti

Admir Baltić, tajnik Bošnjaške zveze Slovenije, takole pojasnjuje zagato s trojnim poimenovanjem slovenskih Bošnjakov in nenehnim spreminjanjem poimenovanj zanje v slovenskih popisih prebivalstva:

Popis iz 2002 je v Sloveniji zabeležil 21.542 Bošnjakov, 10.467 Muslimanov<sup>8</sup> in 8.062 Bosancev. Bolj podroben pogled na dodatne karakteristike teh treh skupin kaže, da govorimo o zelo podobnih skupinah prebivalstva, ki jim je v veliki meri skupno bosansko-hercegovsko poreklo, bosanski jezik kot materni in islam kot prevladujoča veroizpoved. Na podlagi teh skupnih značilnosti se ponuja zaključek, da gre pri teh treh domnevno različnih narodnih skupinah pravzaprav za en narod. Narod, ki se od leta 1993 uradno imenuje *Bošnjaki*, pred tem se je imenoval *Muslimani*, na neformalni vsakdanji ravni – posebej v Sloveniji – pa se mu je večinoma reklo *Bosanci*. To večimensko stanje, zabeleženo na popisu, nam potrjuje, da je bošnjaška narodna zavest še vedno v razvoju in še vedno ni stabilizirana v svojem polnem potencialu.

Ta zabeležena in očitno še vedno živa *troimenost* tudi ne čudi, če upoštevamo številnost in pogostost spreminjanja popisnega imena za Bošnjake v preteklih desetletjih. Slovenski demograf Danilo Dolenc pri obdelavi slovenskih statističnih podatkov iz popisov prebivalstva opaža, da noben drug narod ni imel toliko sprememb imen kot Bošnjaki (Baltić 2009: 25–26).

Predpostavko o trojnem poimenovanju pripadnikov skupine, ki jim je skupno bosansko-hercegovsko poreklo, bosanski materni jezik in večini tudi islamska vera, deloma potrjujejo podatki o priseljenih iz BiH (tabela 4) ter o veroizpovedi in maternem jeziku (tabela 7) iz zadnjega klasičnega slovenskega popisa. Med pripadniki islamske veroizpovedi v Sloveniji leta 2002 (47.488 oseb) so seveda tudi pripadniki drugih narodov,<sup>9</sup> vsekakor pa je pomenljiv podatek o visokem številu tistih, ki na to popisno vprašanje niso želeli odgovoriti (307.973 oseb, tabela 7).<sup>10</sup>

Tabela 7: Slovenija, 2002, prebivalstvo po veroizpovedi in maternem jeziku

veroizpoved	islamska	47.488
	ni želel odgovoriti	307.973
materni jezik	bosanski	31.499
	neznano	52.316

Vir podatkov: SURS, Popis 2002, Slovenija, Prebivalstvo po veroizpovedi in tipu naselja; Prebivalstvo po maternem jeziku

8 Avtor ima tu v mislih opredelitev po narodnosti.

9 Špela Kalčič ugotavlja, da 99 odstotkov članov Islamske skupnosti Slovenije izvira z območja nekdanje Jugoslavije, od tega jih je 90 odstotkov z območja BiH. Preostalih 10 odstotkov predstavljajo Albanci, Romi in Arabci, večinoma nekdanji študentje, ki so v Slovenijo prišli še v času Jugoslavije, in Turki, ki pa ne prihajajo iz Turčije, temveč iz Makedonije (Kalčič 2006: 53, v Vojnović 2008: 17).

10 Na vprašanje, koliko muslimanov je v Sloveniji, je predsednik islamske skupnosti na Jesenicah Ahmed Pašić pred desetletjem odgovoril: »Uradno na popisu 47.500, neuradno pa okrog 60.000« (Nežmah 2004).



Če želimo primerjati delež pripadnikov obeh manjšin, ki so včlanjeni v svoja kulturna društva, potrebujemo še vsaj približno oceno števila članov bošnjaških kulturnih društev v Sloveniji. Baltić ga ocenjuje takole: »Število članov v bošnjaških kulturnih društvih ocenjujem na 1.000 neposrednih članov, ki plačujejo članarino, posrednih članov (družinski člani neposrednih članov, ki redno spremljajo delovanje društva) pa bi lahko bilo do 3.000–4.000.«<sup>11</sup>

## Kvantitativna primerjava

Popisno opredeljenih Slovencev v BiH je 1.100 (tabela 2), članov tamkajšnjih slovenskih društev pa 3.083 (po podatkih Ankete ISIM 2012) oziroma »več kot 4.000« (po podatkih trenutno nedelujoče spletne strani Zveze slovenskih društev BiH »Evropa zdaj« iz leta 2013). Narodnostno opredeljenih Bošnjakov v Sloveniji je bilo ob zadnjem popisu 21.542, približno dvajsetkrat več kot prvih, članov njihovih društev pa 3.000–4.000, torej enako kot članov slovenskih društev v BiH. Zato pa je vključenost Bošnjakov v Islamsko skupnost v Sloveniji, ustanovljeno leta 1994, bistveno večja. Vzroke za to pojasnjuje Baltić (2014: 1):

Ko govorimo o združevanju Bošnjakov v Sloveniji, je islamska tradicija najmočnejši skupni imenovalac, kar se kaže npr. tudi v številnosti članstva v islamski skupnosti kot verski organizaciji nasproti številnosti članstva v kulturnih, športnih in drugih društvih. Islamska skupnost združuje najširši krog Bošnjakov, kar se da pojasniti z dejstvom, da je tudi v BiH islamska vera bila ključni faktor razlikovanja od sosedov pravoslavne in katoliške krščanske veroizpovedi. [...] Tako so tudi Bošnjaki z določeno zamudo oblikovali svojo narodno zavest, ki temelji na islamski tradiciji; ni pa pripadnost islamu pogoj za opredeljevanje za Bošnjaka, saj obstajajo številni agnostiki in ateisti, ki se imajo za Bošnjake [...].

Kljub tem najočitnejšim kvantitativnim razlikam lahko pri obeh manjšinah z vidika njune društvene organiziranosti in kulturne dejavnosti opazamo mnoge podobnosti. V nadaljevanju bom – predvsem na osnovi rezultatov Ankete ISIM 2012 in obeh ključnih intervjujev – z Admirjem Baltićem (2014) in Darkom Mijatovićem (2014) – poskušala osvetliti kulturni položaj obeh manjšin glede na njihovo društveno samoorganiziranost in kulturno dejavnost.

## PRIMERJAVA OBEH MANJŠIN NA PODROČJU DRUŠTVENE ORGANIZIRANOSTI IN KULTURNE DEJAVNOSTI

### Vzporednice

Prva in najočitnejša podobnost je v času nastanka aktualnih društev. Sedanja slovenska društva v BiH so nastala v dveh valih: prvih šest (če štejemo tudi prvo novoustanovljeno društvo, Slovensko skupnost Sarajevo) je nastalo v letih 1992–1994, preostala okoli leta 2003, vmes pa je bilo leta 1998 ustanovljeno največje slovensko društvo v Republiki Srbski, banjaluški Triglav (Žitnik Serafin 2014: 163). Prav tako v dveh valih, skoraj identičnih kot pri slovenskih društvih v BiH, so nastala bošnjaška društva v Sloveniji: prva v času vojne v BiH (1992–1995), druga v novem tisočletju.<sup>12</sup> Od petih ustanovnih društev Bošnjaške zveze Slovenije kar tri ne delujejo več, zato pa na drugi strani nastajajo nova. Med letoma 2005 in 2013

<sup>11</sup> Pismo Admirja Baltića avtorici, 2. 12. 2014 (Arhiv ISIM ZRC SAZU, Bilateralni projekt z BiH 2014–2015, Gradivo.

<sup>12</sup> V Sloveniji je bilo do marca 2003 registriranih 16 društev državljanov muslimanske vere (Klopčič, Komac, Kržišnik Bukić 2003: 207–208), nekaj se jih je medtem preimenovalo v bošnjaška (npr. jeseniški Biser).

so bila ustanovljena nova društva v Velenju, Ljubljani, Kopru in Mariboru (Baltić 2014: 5). V nasprotju z bošnjaškimi društvi v Sloveniji pa imata sarajevski Cankar in banjaluški Triglav res dolgoletno tradicijo predhodnikov, tako kot jo ima nasploh organizirano združevanje Slovencev v BiH.

Pomembna vzporednica je v začetku formalnega združevanja društev obeh manjšin v zveze društev. Bošnjaška zveza Slovenije je bila registrirana leta 1997, predzgodovino pa ima v sodelovanju in povezovanju med bošnjaškimi kulturnimi društvi na območju osrednje Slovenije in Gorenjske. Tudi slovenska društva v BiH so se leta 1998 večinoma vključila v Koordinacijski odbor slovenskih organizacij, ki je bil predhodnik leta 2010 ustanovljene Zveze slovenskih društev v Bosni in Hercegovini »Evropa zdaj«. V Bošnjaško zvezo Slovenije in Zvezo slovenskih društev v BiH je trenutno včlanjenih enako število društev (v vsako po devet). V obeh primerih obstaja v državi še po eno društvo, ki ni vključeno v zvezo.<sup>13</sup> Obe zvezi imata danes zelo podobno vlogo in tudi podobno letno število projektov.

Naslednja podobnost je v organiziranosti društev: (skoraj) vsa imajo v skladu z zakonodajo na področju organiziranosti društev v državi, kjer so registrirana, predsednika, tajnika, blagajnika, izvršni ali upravni odbor, nadzorni odbor, skupščino in častno razsodišče. Skupni vzorec njihove organiziranosti je tudi nadaljnja razdelitev v zelo podobne sekcije. Oblike ohranjanja izvorne kulture so pri njih in drugih tako rekoč identične: sodelovanje pri organiziranju pouka maternega jezika in kulture, knjižnična dejavnost (hranjenje in izposoja knjig v materinščini), praznovanje državnih praznikov (dan državnosti in dan neodvisnosti BiH, 1. maj, novo leto / Prešernov dan, dan slovenske državnosti, dan reformacije, 8. marec ...), praznovanje nekaterih verskih praznikov in gojenje družabnih kulturnih tradicij (dva bajrama, mesec posta / pustovanje, miklavževanje, božič, dedek Mraz, jurjevanje ...), ljudska in narodno-zabavna glasba (sevdalinke, ki jih gojijo v ožjih krogih ljubiteljev sevdalinki; popularna folk glasba iz širšega bosanskega in »srbsko-hrvaškega« govornega prostora / slovenske ljudske in ponarodele pesmi, ki jih gojijo predvsem zbori; popularna slovenska narodno-zabavna glasba), ljudski plesi v okviru folklornih skupin, narodna noša (oboje poročajo o ovirah pri preskrbi z avtentično nošo, zato je na tem področju ponekod precej improvizacije), nacionalne jedi (tu sta obe manjšini še posebno dejavni)<sup>14</sup> in tradicionalni domači izdelki.

Tudi druge društvene dejavnosti obeh manjšin so podobne: lastno spletno stran imata obe zvezi društev, a se obe pri tem soočata s podobnimi težavami (ni ustrezno strokovno usposobljenega skrbnika), zato stran občasno ne deluje. Lastno tiskano glasilo redno izdaja le še pečica društev (prej je svoje glasilo vsaj občasno izdajalo več društev), tudi lastno spletno mesto, ki vključuje dostop do spletnega glasila, ima le po nekaj društev (večina bošnjaških društev ima svoje *facebook* strani, saj so tako lažje v kontaktu s člani). Z drugo založniško dejavnostjo, predvsem občasno, imajo izkušnjo predvsem večja društva. Redna družabna srečanja in piknike prirejajo skoraj vsa društva (zanimivost je npr. tradicionalni kostanjev piknik društva Cankar v Sarajevu). Izlete organizirajo predvsem večja društva, manjša pa se jim pri tem pridružijo. Podobno je tudi s praznovanji osrednjih praznikov, saj je medsebojno sodelovanje med društvi večinoma dobro utečeno. Športne in sorodne dejavnosti organizira približno tretjina njih in drugih društev (tradicionalni bošnjaški turnirji v malem nogometu v Sloveniji, šahovski turnirji itd. / slovenski teniški in šahovski turnirji v BiH, ribištvo, strelstvo idr.). Svoje pevske zборе (ki delujejo redno ali občasno) imajo po tri društva, podoben je tudi delež društev, ki organizirajo različne razstave in predavanja. Obe manjšini sta imeli tudi redne radijske oddaje, ponekod jih imajo še vedno.<sup>15</sup>

13 Poleg tega deluje pod okriljem islamske skupnosti še okoli deset ženskih društev, ki so ravno tako usmerjena k ohranjanju bošnjaške kulture, npr. žensko združenje Zem Zem iz Ljubljane (Baltić 2014: 4).

14 Simbolni pomen hrane je med Slovenci v BiH enak kot npr. med Slovenci v Srbiji (prim. Godina Golija 2014).

15 Slovenci v Banja Luki imajo oz. so imeli oddaje na radiu Republike Srbije, redno oddajo »Slovenija v nas« v Prijedoru, itd., Bošnjaki v Sloveniji pa na mariborskem Radiu Študent (oddaja »Prokleta avlija«) in drugod. Še vedno je na ljubljanskem Radiu Študent prej pogostejša, od leta 2014 pa mesečna oddaja »Podalpski selam«, v programsko-produkcijskem načrtu RTV Slovenija za leto 2014 pa je televizijska oddaja, posvečena pripadnikom narodov nekdanje Jugoslavije v Sloveniji.

Opazna razlika v okviru društvenih kulturnih dejavnosti je v tem, da so Slovenci v BiH najmočnejši na področju pevskih zborov, Bošnjaki v Sloveniji pa na področju folklornih skupin. Ti imajo tudi bolj razvito dramsko dejavnost kot Slovenci v BiH. Likovno dejavnost bolj ali manj redno izvajajo v treh bošnjaških in enem slovenskem društvu, ki ima svojo likovno skupino in si prizadeva (skupaj z zvezo društev) za redno organizacijo likovnih kolonij. Likovne, fotografske in druge razstave pa organizirajo tudi druga društva.

Na vse svoje večje prireditve povabijo društva enih in drugih tudi vsa preostala društva rojakov iz države, vse pogosteje pa tudi iz sosednjih in drugih držav. S tem sodelovanje med društvi ne poteka le prek skupnih projektov zveze društev, ampak tudi neposredno, mimo zveze. Obe manjšini posvečata vedno več pozornosti vključevanju mladih – v nekaterih društvih, npr. v jeseniškem Biseru, tvorijo mladi med 5 in 25 leti starosti skoraj 85-odstotni delež (!) (Balagić 2009: 102).

Obe skupnosti delujeta z vidika medkulturnega zблиževanja na lokalni in nacionalni ravni povezovalno. Slovenska skupnost v BiH je kljub sorazmerno majhnemu številu pripadnikov med najaktivnejšimi na nekaterih skupnih prireditvah vseh manjšin (pa tudi sicer). Društvo Triglav v Banja Luki denimo, ki si deli občinske prostore z vsemi drugimi manjšinami v Republiki Srbski, ima s tem, kot pravi Mijatović (2014: 5) napol v šali, svojevrstno izkušnjo: »Sreča za nas je ta, da je večina drugih manjšin neaktivna in potem imamo mi več prostora.« V resnici pa se zelo radi povezujejo z lokalnimi umetniki večinske ali različnih manjšinskih narodnosti in z njimi sodelujejo na skupnih prireditvah, ki s tem postanejo medijsko zanimivejše (prav tam: 8). Podobno ugotavlja tudi sekretar Bošnjaške zveze Slovenije, da je med različnimi manjšinami v Sloveniji poleg političnega sodelovanja (zlasti v okviru Zveze zvez kulturnih društev narodov nekdanje Jugoslavije) tudi precej kulturnega sodelovanja, tako med zvezami društev kot neposredno med društvi pripadnikov različnih narodov. Kot pozitiven primer takšnega sodelovanja omenja KUD Sevdah iz Ljubljane, ki je tudi član Bošnjaške kulturne zveze Slovenije, hkrati pa redno organizira dogodke, »na katerih jim uspe združiti tudi npr. posamezna albanska in srbska društva – kar je v Sloveniji sicer, koliko vem, prava redkost ali celo neobstoječe, da bi Albanci in Srbi nastopali na isti prireditvi oz. da bi medsebojno sodelovali na kulturnem področju« (Baltić 2014: 8).

## Razlike

Prvo razliko med obema manjšinama lahko opazimo že v samodefinciji prvih in drugih. Sekretar Bošnjaške zveze Slovenije in urednik mesečne oddaje »Predalpski selam« na Radiu Študent Admir Baltić (2014: 1) pravi: »Moja definicija: Bošnjak je vsakdo, ki se opredeljuje za Bošnjaka in ki svojo matično domovino ali matično domovino svojih prednikov vidi v Bosni in Hercegovini in Sandžaku.« Predsednik Zveze slovenskih društev v Bosni in Hercegovini in član izvršnega odbora Društva Slovencev Triglav Banja Luka Darko Mijatović (2014: 1) pa pravi: »Mi upoštevamo zakonodajo v Sloveniji. Ko naši člani zaprosijo za državljanstvo Republike Slovenije, so do lanskega leta lahko zaprosili (kot Slovenci) do četrtega kolena. Zdaj se je to spremenilo, zdaj lahko zaprosijo tisti, ki imajo korenine do drugega kolena.« Za Bošnjake v Sloveniji je narodna pripadnost torej stvar osebne izbire, tako kot na splošno velja v sodobnih popisih prebivalstva, slovensko narodno pripadnost v BiH pa naj bi bilo treba (v skladu s slovensko zakonodajo na področju podeljevanja državljanstva) dokazovati s slovenskim rodovnikom, po novem torej vse do drugega kolena, zaradi česar so v Društvu Slovencev Triglav Banja Luka celo z reducirali število članov s 1.300 na nekaj več kot 700 (prav tam). O problematični politizaciji vprašanja narodne pripadnosti in članstva v slovenskih društvih, ki jo, kot rečeno, poraja dejstvo, da se za pridobitev slovenskega državljanstva na osnovi slovenskega porekla med drugim upošteva tudi potrdilo o aktivnem članstvu v slovenskem društvu, je bilo že veliko razprave,<sup>16</sup> ki pa doslej še ni rodila sadov.

<sup>16</sup> Med drugim na letni predstavitvi rezultatov raziskovalnega projekta »Poklicne migracije Slovencev v prostor nekdanje Jugoslavije: od naseljencev do transmigrantov« 14. 3. 2013 v Prešernovi dvorani SAZU v Ljubljani.

Druga razlika je v organizaciji in virih financiranja pouka materinščine. Dopolnilni pouk slovenskega jezika in kulture za slovenske učence v BiH sofinancira slovensko ministrstvo, pristojno za šolstvo, s tem da pošilja tja učiteljice iz Slovenije. V nekaterih primerih ali v določenih obdobjih društva tudi sama skrbijo za pouk z lastnimi učiteljskimi kadri.<sup>17</sup> Na drugi strani je pouk bosanskega jezika v Sloveniji dolgoročno vključen le na ljubljanski osnovni šoli Livada.<sup>18</sup> Bošnjaška kulturna zveza Slovenije je aprila 2012 začela izvajati projekt »Korenine v Bosni, drevo v Sloveniji«, ki ponuja brezplačni pouk bosanskega jezika in kulture v Ljubljani, na Jesenicah in v Velenju. Projekt, financiran v okviru Švicarskega prispevka, se še vedno izvaja, vendar zaradi pomanjkanja sredstev v omejenem obsegu.<sup>19</sup> Tudi dobrodelno človekoljubno društvo Up z Jesenic je leta 2012 organiziralo šolo bosanskega jezika za otroke in odrasle. Posebej zanimiv je novi projekt Bošnjaškega mladinskega kulturnega društva iz Velenja, s katerim je društvo uspešno kandidiralo na Javnem razpisu Finančnega mehanizma EGP in Norveškega finančnega mehanizma za male projekta 2014, ki obsega sklop delavnic slovenskega in bosanskega jezika pod imenom »Jezikalnice« za krepitev jezikovnih veščin in sklop gledaliških delavnic pod imenom »Nastopalnice« za krepitev komunikacijskih in socialnih veščin (Sokultura.si). Kaže pa, da sistematičnega dopolnilnega pouka bosanskega jezika in kulture, ki bi ga sofinancirala BiH in ki bi bil primerljiv z razvejanim dopolnilnim poukom slovenskega jezika in kulture v BiH, v Sloveniji ni, čeprav Sporazum med Vlado Republike Slovenije in Svetom ministrov Bosne in Hercegovine o sodelovanju v kulturi, izobraževanju in znanosti (1999) v svojih obljubah upošteva načelo recipročnosti: »Pogodbenci bosta organizacijsko in finančno podpirali dopolnilni pouk maternega jezika in kulture za otroke in mladino slovenske narodnosti v Bosni in Hercegovini ter za otroke in mladino iz Bosne in Hercegovine v Sloveniji.« Vega (2013: 11) piše: »Naša država, ki zagotavlja pouk slovenščine za slovenske zamejce, pričakuje reciprociteto – pouk bosanščine naj financira Bosna in Hercegovina. A Bosna in Hercegovina, ki je po vojni izgubila tretjino prebivalstva, ki se je razselilo, ob lastnih gospodarskih in političnih težavah tega ne zmore.«<sup>20</sup>

Tretja razlika je v virih sofinanciranja manjšinskih kulturnih dejavnosti, o čemer bo zaradi neposredne navezave na zaključne predloge več razprave v sklepu. Drugih vzporednic in razlik med obema manjšinama je na področju njune organiziranosti in kulturnih dejavnosti še veliko, a jih moram zaradi omejenega prostora na tem mestu obiti.

## SKLEP

Med obema opazovanima manjšinama je očitno več podobnosti kot razlik, kar gotovo ne preseneča, če upoštevamo, da sta naroda živela v isti državi kar 113 let, od leta 1878 do slovenske osamosvojitve. To je verjetno tudi vzrok, zakaj se Bošnjak v Sloveniji in Slovenec v BiH na splošno počuti bolj ali manj

17 O izrednem zanimanju za pouk slovenščine v BiH in drugih delih jugoslovanskega prostora razpravlja Metka Lokar (2013).

18 Marijanca Ajša Vižintin (2014) poleg spodbujanja pouka materinščine v okviru osnovnih šol predlaga kompleksen model medkulturne vzgoje in izobraževanja za uspešnejše vključevanje učencev s priseljenkim oziroma manjšinskim ozadjem.

19 Podrobnosti o t. i. Švicarskem prispevku, programu švicarskega Zveznega sveta za zmanjševanje gospodarskih in socialnih razlik v razširjeni Evropski uniji, je mogoče prebrati na spletni strani Službe vlade RS za razvoj in evropsko kohezijsko politiko.

20 Podobno stisko občutijo tudi bosansko-hercegovski izseljenci drugod po svetu, npr. v Nemčiji, o čemer govori Predsednik Zveze bosanskih dopolnilnih šol v Nemčiji Haris Halilović (v Savez dopunskih šola ...): »... nadležna ministarstva i institucije BiH redovno se oglašuju o naše zahtjeve da se oblast dopunskog obrazovanja za djecu građana BiH u inostranstvu do kraja i na državnom nivou reguliše. Dopunsko obrazovanje na bosanskom jeziku za sada se održava zahvaljujući susretljivosti Nijemaca i aktivnostima roditelja. Očekujemo da bh. vlast shvati značaj ove oblasti, dok još nije kasno i konačno nam više pomogne [...]. Bosna i Hercegovina je zemlja koja je do sada učinila najmanje za dopunsko obrazovanje na maternem jeziku djece svojih građana od svih zemlja čiji državljani žive u Njemačkoj.«

domače. In to kljub dejstvu, da gre v obeh primerih za narodno, jezikovno in versko manjšino, kar pomeni, da se obe manjšini razlikujeta od večinske družbe vsaj po treh parametrih.

Prevlada vzporednic nad razlikami je več kot očitna predvsem na področju kulturnih interesov obeh manjšin, v veliki meri pa tudi na področju možnosti za njihovo uresničevanje. V obeh je kulturna produkcija v samih društvih izredno pomembna za krepitev izvorne kulturne identitete članov (Mijatović 2014: 7; Baltić 2014: 7). Za ohranjanje materinščine skrbita obe manjšini tako skozi društveno dejavnost, nastope, spletne strani in publikacije v materinščini kot tudi s sodelovanjem pri organiziranju pouka materinščine. Z vidika omogočanja uresničevanja kolektivnih verskih pravic pripadnikom islamske vere pa so se v Sloveniji v preteklih desetletjih zadeve reševale zelo počasi (npr. zapreke pri pridobivanju dovoljenj za gradnjo ljubljanske džamije). Na tem področju je še precej neuresničenih možnosti, npr. delovna zakonodaja, ki bi upoštevala verske praznike manjšin ter njihove prehranske in druge navade.

Pri omogočanju uresničevanja kolektivnih pravic na področju kulturne dejavnosti imata državi podoben odnos do manjšin znotraj svojih meja, saj so lahko kulturni projekti društev (poleg članarin in donacij) sofinancirani iz več virov. Slovenska društva v Federaciji BiH deloma sofinancirajo občine in nekateri kantoni, npr. Ministrstvo za kulturo kantona Sarajevo, občasno tudi Zeniško-dobojski kanton, v Republiki Srbski pa prav tako občine ter Ministrstvo za šolstvo in kulturo Republike Srbije (Anketa ISIM 2012). Bošnjaška društva v Sloveniji so v zadnjem desetletju sofinancirali ministrstvo za kulturo in/ali Javni sklad RS za kulturne dejavnosti ter občine. Pri tem je treba poudariti, da obe manjšini pesti nizka višina sredstev, ki jih prejmeta za kulturne dejavnosti iz državnih virov, medtem ko sta praviloma bolj zadovoljni s sodelovanjem v lokalnih skupnostih, ki mnogim društvom poleg splošnih razpisov na področju manjših kulturnih projektov, založništva, posvetov, infrastrukture idr. zagotavljajo brezplačno uporabo ali vsaj subvencioniran najem prostorov.

Na drugi strani pa je skrb za lastno manjšino v drugi državi v primeru Slovenije in slovenske manjšine v BiH mnogo bolj urejena kot v primeru BiH in Bošnjakov v Sloveniji. Delovanje slovenskih društev v BiH znatno sofinancira Urad Vlade RS za Slovence v zamejstvu in po svetu, tamkajšnji dopolnilni pouk slovenskega jezika in kulture pa slovensko ministrstvo, pristojno za šolstvo, medtem ko BiH tolikšne skrbi za svoje manjšine po svetu ne zmore.

Mijatović (2014: 9) poudarja, da manjšinski status Slovencev v BiH pomeni boljši dostop do sofinanciranja s strani BiH – države, njenih entitet in lokalnih oblasti. Baltić (2014: 9) pa na vprašanje, ali bi po njegovem mnenju formalno priznani manjšinski status Bošnjakov v Sloveniji pomenil boljši dostop do sofinanciranja s strani Slovenije (na državni in lokalni ravni), odgovarja: »Če bi bil status tako urejen, da to težavo ureja, potem ja. Ni nujno, da status sam zase avtomatično povleče za seboj tudi bolj ugodne možnosti za financiranje delovanja društev, ampak z naše strani je eden izmed ključnih smislov statusa ravno v tem.«

Tudi če bi želeli urejati manjšinske kulturne pravice Slovencev v BiH in Bošnjakov (in drugih narodov BiH) v Sloveniji v kolikor mogoče prilagodljivem »duhu simetrije«, kot pravi Napolitano, in ne dosledno »recipročno«, pri čemer bi torej upoštevali splošne razmere v obeh državah, bi morala Slovenija najprej urediti dvoje: 1) pripadnikom narodov nekdanje Jugoslavije v Sloveniji (z mehko ustavno spremembo in/ali zakonskimi akti) priznati manjšinski status in sofinanciranje njihovih kulturnih dejavnosti iz javnih sredstev obravnavati na podoben način kot sofinanciranje kulturnih dejavnosti doslej priznanih manjšin (možnost pokrivanja dolgoročnih stroškov delovanja), vendar ne na način slednjih; 2) z BiH skleniti bolj ali manj fleksibilen bilateralni sporazum o vzajemnem sofinanciranju kulturnih dejavnosti lastne manjšine v državi soprodpisnici in jo spodbuditi k vsaj simboličnemu upoštevanju meddržavnega sporazuma iz leta 1999 o vzajemnem sofinanciranju dopolnilnega pouka materinščine za mlade pripadnike lastne manjšine v državi soprodpisnici. Ker Slovenija že zdaj prek rednega letnega razpisa Urada Vlade RS za Slovence v zamejstvu in po svetu sofinancira slovenska društva v BiH, prek ministrstva za šolstvo pa tamkajšnji dopolnilni pouk slovenščine, bi z uresničitvijo 2. točke tega predloga tako breme kot koristi, ki jih prinaša podpora lastni manjšini v drugi državi, lahko nekoliko

enakomerneje kot doslej porazdelili med obe državi. S tem bi državo BiH spodbudili k večjemu posluhu za potrebe njene diaspore in upoštevanju obstoječega meddržavnega dogovora v tej ali oni obliki, ki bi za BiH predstavljala čim manjše breme. Z uresničitvijo obeh točk tega predloga bi se tako – ob vsaj simbolični finančni participaciji BiH – del slovenskih javnih sredstev za kulturne projekte manjšinskih skupnosti pripadnikov narodov BiH lahko prenesel na javni poziv na področju sofinanciranja njihovega rednega delovanja in kulturnih programov, kar v slovensko proračunsko porabo verjetno ne bi prineslo preveč občutne spremembe. Materialni in predvsem moralni učinek uresnitve obeh točk predloga pa bi bil za Bošnjake v Sloveniji vsekakor pozitiven.

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## SUMMARY

### RECIPROCITY OR SYMMETRY? A COMPARISON OF THE CULTURAL INTERESTS AND POSSIBILITIES OF TWO MINORITIES

Janja ŽITNIK SERAFIN

The article comprises a comparison between the Bosniak minority in Slovenia and the Slovenian minority in Bosnia and Herzegovina, their organizational patterns, cultural production within their ethnic cultural societies and associations, and their access to various financial resources including those necessary for (co)organising lessons or courses on their mother tongues. The comparison is based on extensive fieldwork carried out between 2012 and 2014: a survey carried out among the Slovenian cultural societies in Bosnia and Herzegovina, and a number of interviews, of which two were particularly relevant for this paper: with the Secretary and Projects Leader of the Bosniak Association of Slovenia, Admir Baltić, and with the Chair of the Association of Slovenian Societies in Bosnia and Herzegovina, Darko Mijatović.

As Slovenia and Bosnia and Herzegovina were parts of the same state for such a long time – first in Austria-Hungary, then in the Yugoslav kingdom and finally in socialist Yugoslavia, it is not surprising that there are more similarities than differences between their minorities living in the other country – despite the fact that in both cases we are talking about national, linguistic and religious minorities, which means that they both differ from the majority society at least in terms of three different parameters.

The main parallels between the cultural societies and associations of these two minorities are: 1) the time of the formation of the present cultural societies (1<sup>st</sup> wave: 1992–95, 2<sup>nd</sup> wave: in the new millennium); 2) the same number of member societies in both associations (nine in each); 3) the same role and purpose of the associations; 4) the same number of annual projects in both associations; 5) the same organization patterns of the societies; 6) the same forms and ways in which they maintain their cultural traditions and mother tongue.

There are two main differences between the Slovenian minority in Bosnia and Herzegovina and the Bosniak minority in Slovenia. In 2003, the Slovenians in Bosnia and Herzegovina obtained the status of a national minority whereas the Bosniaks in Slovenia are still striving for the acknowledgement of such status. On the other hand, Slovenia's support for the Slovenian minority in Bosnia and Herzegovina has been much more substantial than the support of Bosnia and Herzegovina for the Bosniak minority in Slovenia. I believe Slovenia should acknowledge the minority status of members of the nations of the former Yugoslavia in Slovenia, including the Bosniaks, and Bosnia and Herzegovina should – at least to a very modest degree – comply with the existing bilateral agreement with Slovenia on the reciprocal funding of each minority's mother tongue classes in the other country. It will probably take a considerable period of time before these goals can be reached; but as first steps in this direction were made many years ago, it is time for some further steps now.



# REPREZENTACIJE NEEVROPSKEGA SVETA V IZOBRAŽEVALNEM SISTEMU: UČBENIKI KOT AKTER ETNOCENTRIČNE IN RASISTIČNE SOCIALIZACIJE

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## IZVLEČEK

### Reprezentacije neevropskega sveta v izobraževalnem sistemu: učbeniki kot akter etnocentrične in rasistične socializacije

Namen članka je ugotoviti, kako izobraževalni diskurz kot pomemben socializacijski akter generira etno-/evropocentrična stališča in rasistične reprezentacije »drugega«. Avtorica izhaja iz socialnozgodovinske in primerjalne metode posameznih teorij etno-/evropocentrizma in rasizma ter njihove reprodukcije v izobraževalnem diskurzu. Ugotavlja, da učbeniki za zgodovino in geografijo omogočajo definiranje potencialno možnih in zelo verjetnih situacij, ki vodijo v negativne, evropocentrične, tudi rasistične sklepe o Neevropejcih in migrantih. To dosegajo s posebnimi jezikovnimi strategijami, s selekcijo slikovnega gradiva in zlasti na ravni vsebine ter širšega tekstualnega konteksta.

KLJUČNE BESEDE: etnocentrizem, rasizem, ideologija, učbeniki, Neevropa

## ABSTRACT

### Representations of the Non-European World in the Educational System: Textbooks as an Agent of Ethnocentric and Racist Socialization

The intention of this paper is to determine how the educational system as a significant actor in the socialization process generates ethno-/Eurocentric standpoints respectively, and racist representations of "the other". The article is methodologically based on the social-historical and comparative method of selected theories from the research field of ethno-/Eurocentrism and racism and their reproduction in educational discourse. The author states that geography and history textbooks frequently enable the defining of potentially possible and above all exceedingly plausible situations, which leads to negative, Eurocentric and racist conclusions about Non-Europeans and migrants. This can be achieved by means of particular linguistic strategies, selection of illustrative material, and especially at the level of content and broader textual context.

KEY WORDS: ethnocentrism, racism, ideology, textbooks, Non-Europeans

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## UVOD

Članek<sup>1</sup> izhaja iz enega od temeljnih vprašanj o ideološkem procesu ustvarjanja pomenov tako na ravni produkcije kot tudi širjenja in potrošnje podob »drugega« skozi jezik. Proces nastajanja pomenov o (etničnem) »drugem« in predvsem reprezentacije njegovih identitet nam in preko nas bodo aplicirane na področje socializacijskih procesov v širšem in izobraževalnega sistema v ožjem smislu. Ker (etnične) identitete kot ene izmed kulturnih identifikacij niso zgolj oblike notranjih individualnih psiholoških stanj, ampak oblike družbenega življenja in kot take ideološki koncept v zgodovinskem procesu oblikovanja kultur, je izobraževalni sistem prav gotovo (lahko) med pomembnimi generatorji pristranskih, negativnih, tudi diskriminatornih in sovražnih reprezentacij pripadnikov drugih etničnih skupnosti, še zlasti manjšinskih.

Medtem ko obstaja tako v slovenskem prostoru kot tudi širše precejšen korpus raziskav o reprezentacijah »drugega« v množičnih medijih, ostaja področje izobraževalnega sistema – vsaj v Sloveniji – razmeroma šibko raziskano. V pričujočem prispevku bom zato izhajala iz nekaterih tujih raziskav (Van Dijk 1987, 1998; Carignan, Sanders, Pourdavood 2005 idr.), ki kažejo, da otroške in šolske knjige, zlasti učbeniki o zgodovini, geografiji in družbenih vedah v različnih zahodnoevropskih državah dosledno izražajo določeno stopnjo etno-/evropocentrizma, negativnih podob in celo rasističnega diskurza. Obenem so predvsem lastne in preostale zahodnoevropske države ali kulture sistematično predstavljene bolj obsežno ter bolj naklonjeno in pogosto superiorno do drugih, zlasti nekdanjih kolonij oziroma neevropskega sveta.<sup>2</sup> Ti opisi so nemalokrat stereotipni, ahistorični in zanemarjajo problem diskriminacije in rasizma. Take prevladujoče predstave o drugih etničnih skupinah v šolskih učbenikih imajo seveda pomembno vlogo v procesu etnocentrične socializacije in posredovanja znanj in stališč mlajšim generacijam. Prav tako se ustrezno vključujejo v splošen negativen okvir prikazovanja pripadnikov drugih kultur kot nagnjenih h kriminalu in nasilju, revščini, primitivizmu, nesposobnosti ali v najboljšem primeru k eksotičnosti tako v procesih socializacije in izobraževanja kot tudi v množičnih komunikacijah.

Na javni tribuni z naslovom Ljudstva sveta v šolskem sistemu in sodobnem strokovnem besedišču<sup>3</sup> leta 2007 so udeleženci ugotavljali, da so predstavitve predvsem afriškega kontinenta pogosto stereotipne, posplošene, enostranske in evropocentrične ter zato neredko zavajajoče, terminološko sporne in v nekaterih primerih tudi faktografsko netočne. Istega leta so dosegli, da so se v novih geografskih učnih načrtih za srednje šole črtale nekatere najbolj kritične vsebinske zahteve ali bile nadomeščene z ustrežnejšimi, v ponovno izdajo učbenika ene izmed založb pa so bile vključene tudi nekatere predlagane spremembe. Kljub temu glavni problem v zvezi z vsebino geografskih in zgodovinskih učbenikov za osnovne šole ni bil odpravljen. Društvo Afriški center je nadaljevalo in razširilo začeto delo ter izdalo publikacijo *Afrika v slovenskem šolskem sistemu*,<sup>4</sup> na katero se bo zlasti v zadnjem poglavju, v katerem bo narejena sinteza izbranih empiričnih raziskav in glavnih ugotovitev, nanašal tudi pričujoči članek. Ta bo vključeval tudi raziskavo Vključenost vsebin večkulturnega izobraževanja v učne načrte in učbenike za predmet geografija avtorice Natalije Vrečer (2012) ter tekst Rajka Muršiča (2005) *The Colorful Discourse of the Geographic Other: On Race and Racism in General Education (Slovenian Example)*.

Za potrebe pričujočega članka, ki je teoretsko in empirično izhodišče za lastno raziskavo izbranih slovenskih osnovnošolskih učbenikov, uporabljam kombinirano raziskovalno metodo. Ta izhaja

1 Zaradi obširnosti raziskave in predvsem zanimivih ugotovitev je pričujoči članek teoretski okvir analize učbenikov, ki bo objavljena v samostojnem prispevku.

2 Z izrazom neevropski svet mislimo predvsem na Afriko, Azijo in Latinsko Ameriko.

3 Tribuno je izvedla Iniciativna skupina za neomalovažujoče predstavljanje svetovnih kultur v slovenskih učbenikih v okviru Društva Afriški center in v sodelovanju s Slovenskim etnološkim in antropološkim združenjem KULA v Slovenskem šolskem muzeju.

4 Na podlagi omenjenega projekta je bil istega leta v reviji *Razprave in gradivo: Revija za narodnostna vprašanja* objavljen tudi članek Janeza Pirca z naslovom *Misrepresentations of Africa in Contemporary Slovene School Textbooks*.

iz primerjalne metode posameznih teorij etno-/evropocentrizma in rasizma ter kontekstov njihove diskurzivne reprodukcije v izobraževalnem sistemu. Poleg omenjene uporabljam tudi socialnozgodovinsko metodo, s pomočjo katere pristopam k obravnavani temi, da v historični perspektivi preučujem mehanizme (ideološke, družbene ...), ki so omogočili konstrukcijo in reprodukcijo sodobnih etno-/evropocentričnih in rasističnih diskurzov elit, tudi izobraževalnega.

## ETNOCENTRIZEM, RASIZEM IN DISKURZIVNE REPREZENTACIJE NEEVROPSKEGA DRUGEGA

Predsodki, stereotipi, etnocentrizem, ksenofobija, antisemitizem, diskriminacija etničnih ali »rasnih«<sup>5</sup> manjšin, etnicizem<sup>6</sup> in navsezadnje rasizem izhajajo iz socialne konstrukcije telesnih, kulturnih ali/in družbenoekonomskih razlik (bodisi obstoječih bodisi namišljenih), zaradi česar jih je treba preučevati na kognitivni, diskurzivni družbeni ravni, na ravni medskupinskih odnosov, institucij in kot kompleksen sistem dominacije kulture. Medtem ko med etno-/evropocentrizmom in rasizmom, ki sta osrednja koncepta pričujočega članka, obstajajo pomembne konceptualne razlike, menim, da med njima obstaja izrazito koherentno razmerje in da ju brez razumevanja tega razmerja ni mogoče niti na teoretski ravni niti historično zadovoljivo pojasniti. Etnocentrizem in evropocentrizem kot eno od njegovih oblik<sup>7</sup> idealnotipsko definiramo kot ideologijo, ki favorizira lastno etnično skupino kot superiorno, najpomembnejšo in tudi najvrednejšo v primerjavi z drugimi. Etnocentrični posamezniki tako presojujejo druge etnične skupine samo v relaciji do lastne, ki je edino relevantno in tudi najvišje merilo, kriterij presojanja jezikovnih, vedenjskih, kulturnih in drugih razlik. V tem smislu se navezuje na etnicizem oziroma rasizem. Tudi Pierre L. van den Berghe meni, da sta rasizem in etnocentrizem zelo povezana in da kljub večji razširjenosti drugega, ki je po avtorjevem mnenju »univerzalen« (van den Berghe 1991: 84; 2006: 852), včasih delujeta simultano. Oba sta namreč razširjeni obliki nepotizma, po katerem imamo raje sorodstvo kot nesorodstvo, rasna in etnična čustva pa so podaljšek sorodstvenih (pa čeprav včasih fiktivnih) čustev. Le kriteriji za definiranje skupnega prednika so pri rasizmu drugačni (včasih pa tudi sovpadajo) kot pri etnocentrizmu. Pri prvem gre za razlikovanje na podlagi fizičnih značilnosti (barva kože in/ali oči, obrazne poteze, tekstura las ...), pri drugem pa kulturnih (jezikovnih,<sup>8</sup> verskih, vedenjskih, teritorialnih, itd.).

- 5 Koncept »rase« izhaja iz Linnejevih opisov petih človeških podvrst glede na njihove vedenjske in morfološke značilnosti in je bil pozneje uspešno vključen v evolucionistično paradigmo in arzenal zahodnoevropskih predsodkov in stereotipov. Bil je eden od temeljnih konceptov fizične antropologije, ki je bila do petdesetih in šestdesetih let 20. stoletja dejansko sinonim za študij »ras« (Caspari in Muršič 2005: 43–44). Sicer pa »posvajam« argument, ki ga je o uporabi termina »rasa« navedel Kwame Anthony Appiah: »Sam sem porabil toliko časa za zanikanje resničnega obstoja »ras«, da tega termina enostavno ne morem uporabljati brez narekovajev« (Appiah v Jeffs 2007: 339).
- 6 Etnicizem Dijk definira kot »milejšo« obliko rasizma, pri kateri so poudarjene predvsem družbenoekonomske in družbenokulturne kategorije lastnosti, ne pa toliko eksplicitno diskriminirane fiziološke in telesne značilnosti pripadnikov manjšinske skupnosti (npr. barva kože ...) kot v primeru rasizma. Dejansko gre v obeh primerih za rasizem, saj etnicizem predstavlja zgolj izogibanje realnemu obstoju rasizma in njegovemu problematiziranju v sodobnih evropskih državah (van Dijk 1987: 215, 231; 1993: 5). Uporablja se tudi izraz kulturni rasizem.
- 7 Evropocentrizem je v razsvetljenstvu utemeljena kolonialna perspektiva, po kateri so evropske vrednote dojete kot univerzalne norme, neevropske pa kot partikularne, periferne (Banks v Carignan, Sanders, Pourdavood 2005: 4).
- 8 Jezik je po van den Berghejevem mnenju neločljivo povezan z etničnostjo. Samo materni jezik, ki se ga naučimo v otroštvu, je zaradi mnogoterosti čustvenih konotacij intimno povezan z vsemi čustvi, ki jih prvič doživimo z najbližjim sorodnikom. Te čustvene kvalitete sorodstva pa povežemo z jezikom in jih prenesemo na druge pripadnike naše govorne skupnosti (van den Berghe 1991: 105).

## Vloga družbenih elit v (re)produkciji etnocentrizma in rasizma

Etno-/evropocentrizma in rasizma ne moremo pripisovati samo relativno majhnim ekstremističnim skupinam, ampak mnogim individualnim, skupinskim in institucionalnim praksam v posamezni družbi, tudi elitnim. In te so tiste, ki nas morajo zanimati (nemara celo bolj kot »klasični«, tj. eksplicitni, namenski, ekstremistični, desničarski rasizem). Kot ugotavlja Teun A. van Dijk, rasizem ponuja »dober« primer zapletenih odnosov med družbenimi elitami in njihovimi ideologijami ter popularnim, množičnim nezadovoljstvom ljudi. V tem smislu je rasizem pojav, ki je konstruiran in reproduciran z obeh strani<sup>9</sup> (van Dijk 1998: 176–177). Manifestira se tako v nediskurzivnih (npr. diskriminacija na področju zaposlovanja, izobraževanja, bivanja, zdravstva, sociale, fizična agresija, itd.) kot diskurzivnih<sup>10</sup> in komunikacijskih praksah in strukturah, pri čemer se te pogosto med seboj podpirajo in krepijo. Povedano drugače, rasizem elit omogoča (simbolno) (re)produkcijo in interpretacijo rasizma v družbi na način preformulacije popularnih (ekstremnih) oblik rasizma. »Bele« elite empatično zanikajo svojo vlogo v reprodukciji rasizma tako na kognitivni kot družbeni ravni, obenem pa obtožujejo revne »belske« populacije ksenofobičnega vedenja ter izkoriščajo njihovo nezadovoljstvo za propagiranje lastnih etnocentričnih ali ksenofobičnih stališč (van Dijk 1993: 5). Kot pravi Josep Fontana (2003: 131–132), rasizem obsojamo,

kadar se razmahne in razodene v vsej svoji surovosti – pri požigih domov za priseljence v Nemčiji, iztrebljanju domorodcev v Braziliji, »etničnem čiščenju« na Balkanu – spregledujemo pa vsakdanjo rasistično stvarnost, polno diskriminacije in predsodkov, in se niti ne zavedamo, kako zelo zaznamuje našo kulturo in z njo naše miselno orodje.

To seveda ne pomeni, da s(m)o »belci« inherentno rasisti, ampak da s(m)o si Evropejci<sup>11</sup> zgodovinsko pridobili ali prilastili moč, ki s(m)o jo nato reproducirali kot različne oblike občutka rasne superiornosti v odnosu do Neevropejcev in migrantov in kot sistem diskriminacije, implementiran preko praks izključevanja, marginalizacije, segregacije ali represije in nadzora. Ti procesi se zgodovinsko seveda tesno navezujejo na suženjstvo, zahodna osvajanja, evropski kolonializem in imperializem, v sodobnem času pa na odnose med Severom in Jugom, med evropskimi večinskimi nacijami in (ne)evropskimi manjšinami ter na neokolonialna razmerja. Govor članov večinskih skupin o drugih etničnih in »rasnih« skupinah ne izraža samo njihovih osebnih prepričanj in stališč, ampak obenem reproducira mnenja o etničnih vprašanih, skupne stereotipe in predsodke celotne skupine. Te si posameznik pridobi z osebnimi izkušnjami in prepričanji, z informacijami, pridobljenimi iz medosebnih in javnih diskurzov (politikov, novinarjev, piscev šolskih učbenikov, učiteljev, znanstvenikov, menedžerjev ...) in s širše, družbeno posredovanimi stališči o etničnih manjšinah in drugih kulturah.

Na reprodukcijo informacij torej po eni strani pomembno vpliva aktivno preoblikovanje mnenj in stališč, v katerem posamezniki tvorno, prilagojeno in prepričljivo prenašajo svoje interpretacije drugim posameznikom v novih komunikacijskih situacijah. Po drugi strani pa nanjo vpliva tudi pasiven in nespremenjen prenos določenih sporočil in njihovih pomenov, s katerim posamezniki na enak oziroma podoben način kot drugi pripadniki iste skupine reproducirajo dominantna prepričanja in ideologijo skupine, ki ji pripadajo, in jo s tem obnavljajo in ohranjajo. Reprodukcijska (etno-/evropocentrizma in rasizma) je torej vedno obenem tudi produkcija. Ali, kot piše van Dijk (1993: 6): »Če belci niso sami aktivno vključeni v moderne oblike segregacije, izključevanja, agresije, inferiorizacije ali marginalizacije,

9 Vplivi množic se generirajo na podlagi vsakodnevnih družbenoekonomskih soočanj (naj)nižjih slojev z revščino, nezaposlenostjo in s percepcijo priseljencev kot favoriziranih na področju zaposlitve, bivanja, sociale ... Rasizem višjih in visokih slojev je bolj kot v družbenoekonomske kategorije vpet v področje kulture, to je navad, običajev, religije, jezika, izobraževanja in vrednot.

10 Med diskurzivne prakse elit van Dijk (1998) šteje politični, korporativni, akademski, medijski in izobraževalni diskurz.

11 Izraz Evropejci se nanaša tako na prebivalce Evrope kot tudi Severne Amerike in Avstralije, kjer so po preselitvah postali večinsko prebivalstvo.

potem so v problem rasizma vključeni s svojo pasivnostjo, sprijaznitvijo, z ignoranco in indiferentnostjo do etnične ali »rasne« neenakosti.« Povedano drugače: samo ob predpostavki, da prevlada sistem multikulturnih norm, vrednot, zakonov in ideologij in da je ta sistem aktivno implementiran v socialne kognicije in interakcije v skupini, samo takrat sta etnocentrizem in rasizem lahko presežena. Elite imajo torej še posebno odgovornost v etnocentričnem in rasističnem reproduktivnem procesu. One so tiste, ki razpolagajo z večino simbolnega in kulturnega kapitala, na podlagi katerega lahko tako aktivno propagirajo ideologijo etnocentrizma in rasizma kot ji aktivno nasprotujejo s tem, ko določajo agendo posredovanih vsebin, formulirajo probleme, o katerih se govori, nadzirajo in izvajajo (dis)kontinuiteto obstoječih sistemov norm in vrednot, itd. Učitelji, avtorji učbenikov in (predvsem) drugi, vključeni v izobraževalni proces (strokovne službe, ministrstva, ...), imajo nadzor in zlasti posredno moč nad učnim programom, poukom, raziskovalnimi projekti, itd., v katere so vključeni otroci in mladi. Ti preko primarne socializacije v družini, vrstniškega druženja, otroških knjig, televizije, svetovnega spleta, predvsem pa sekundarne socializacije v šolah (ti procesi so pogosto medsebojno kompatibilni) pridobijo osnovne formate interpretativnega okvirja. Ta okvir določa diskurz o drugih etničnih skupinah, medetničnih odnosih, itd., pogosto pa so to za večino otrok verjetno glavni ali celo edini vir informacij in interpretacij o drugih etnijah, kulturah ... A več o tem v naslednjem poglavju.

## Evropocentrična delitev na »tri« svetove in hierarhičen koncept kulture

Ker so socialne reprezentacije (védenje/znanje, vedénje, ideologije) odvisne od družbenega konteksta, so inherentno povezane s procesom označevanja posameznikov ali skupin kot »drugih«, o čemer je bilo že mnogo napisanega.<sup>12</sup> Nemara pomembneje pa je, da se vzporedno s tem oblikujejo tudi predsodki in stereotipi kot vrednotne oblike imenovanja ali etiketiranja posameznikov, skupin, na redukcionističen način in s strategijo simbolnega izključevanja ali, na kratko, kot subtilne, a trdovratne mikro-ideologije vsakdanjega sveta (Nastran Ule 1999). Proces ustvarjanja »drugega« je s tega vidika mogoče definirati kot »distanciranje perifernega, marginalnega in postranskega glede na kulturne norme ali prepovedano nevarnega glede na varno zakonitost« (Jordanova v Pickering 2001: 48). Etnični stereotipi so postali izrazito navzoči in hkrati tudi nekritično sprejeti zlasti med oblikovanjem nacionalnih držav v Evropi v 18. in predvsem 19. stoletju ter med evropskim imperialistično-kolonialističnim osvajanjem preostalih celin pa tudi evropskega Vzhoda in Balkana.

V tem obdobju je bilo stereotipno konstruiranje »drugega«, utemeljeno tudi v psevdoznanstvenih racionalizacijah »rasnih« in kulturnih razlik, v evropskih državah dojeto kot izraz modernosti in poskus »naprednega« urejevanja sveta. Vzpostavljanje moderne paradigme v zahodnoevropskih državah je nujno vodilo v zavestno določanje kulturnih razlik in različnih kulturnih identitet zlasti na relaciji konstruktov »moderno«–»primitivno« kot načina upravičevanja poznejše ekspanzivne politike tedanjih evropskih velesil. Proti koncu 19. stoletja je bil »primitivizem« produkt progresivne socialne evolucionistične teorije in je pridobil svoje strokovne utemeljitve v številnih znanstvenih disciplinah, zlasti v antropologiji kot izrazito kolonialni vedi, katere glavni predmet raziskovanja so bile »primitivne« družbe. Romantične predstave o »plemenitem divjaku« in izgubljenih zlatih dobah so tedaj nadomestili z idejami o »primitivnem« posamezniku kot nasprotju civiliziranosti, kot neustaljenem in nomadskemu, spolno promiskuitetnem, na skupnost navezanem, neracionalnem ter magiji, intuiciji in vraževerju podvrženem »barbaru«, ki potrebuje nadzor in vodenje »naprednejših«, »razvitejših« prebivalcev Evrope. Vloga socialnega darvinizma oziroma socialnega evolucionizma je tako postala predvsem opravičevanje in racionaliziranje ekspanzionističnih pohodov in kolonialnih osvajanj ter imperialistične in rasistične ideologije. Obenem pa je bil zelo učinkovit pri inkorporaciji statičnega hierarhičnega modela znotraj sicer dinamičnega evlucijskega sistema družbenega razvoja, ki naj bi svoj vrh dosegel na »stopnji razvoja«

12 Npr. Hallova teorija o drugosti (Hall 1997).

evropskih nacij, medtem ko so »primitivne« družbe, zlasti v Afriki in Avstraliji, ostajale na njegovem dnu. S tem je čas v večji meri kot prostor postal merilo delitve sveta (Pickering 2001: 54). »Primitivni drugi« je bil živi fosil človeškega razvoja, ki je iz tega razloga nudil številne možnosti znanstvenega preučevanja. To pa ni bilo toliko namenjeno raziskovanju drugih, geografsko in tudi simbolno oddaljenih ljudstev, ampak predvsem identificiranju evropskega človeka kot utelešenega dokaza o zgodovinskem napredku.

Po drugi svetovni vojni sta izraza »primitiven« in »moderen« zamenjala na videz bolj sofisticirana termina »tretji« in »prvi« svet, a socialnodarvinistična logika in razvojnostni diskurz sta ostala. Ker gre za še danes pogosto uporabljena, ne pa tudi pogosto problematizirana izraza, naj jima na tem mestu namenim nekoliko več pozornosti. Termina sta problematična in tudi napačna, ker za države z etiketo »tretji« ali »prvi« svet predpostavljata preveč poenostavljenih podobnosti, obenem pa implicitno utrjujeta obstoječe ekonomske, kulturne in ideološke hierarhije, kot pravi Talpade Mohanty (v Jeffs 2007: 144). V šestdesetih letih, ko je bila dekolonizacija na višku (z izjemo Latinske Amerike), je izraz »tretji« svet označeval »države v razvoju«. Še danes aktualna ali celo »naturalizirana« razdelitev na »tri« svetove je torej nastala pretežno iz ideoloških (evropocentričnih) razlogov, po katerih je »prvi« svet, torej kapitalistični evropski Zahod in ZDA, za preostali svet civilizacijski standard (Hobson in Sharman 2005: 88–90). Od tu do hierarhičnega koncepta kulture in rasističnega diskurza je le še korak. V svoji kritiki Fredrica Jamesona Aijaz Ahmad namreč opozarja, da je opredeljevanje »prvega« in »drugega« sveta s produkcijskimi sistemi (kapitalizmom in socializmom), »tretjega« pa z »izkustvom« od zunaj vnešenih pojavov (kolonializma in imperializma), problematično, saj je tisto, kar naj bi bilo konstitutivno za človeško zgodovino, prisotno samo v prvih dveh svetovih,<sup>13</sup> v tretjem pa manjka. Poleg tega je tudi napačno.<sup>14</sup> Pa tudi če sprejmemo delitev na tri ali dva svetova, ne da bi s tem že odgovorili, kdaj je »prvi« svet sploh postal prvi, je ravno v »trebuhu globalnega postmodernizma prvega sveta pravcati tretji svet«, raje pa vsaj še dva ali trije drugi (Ahmad v Jeffs 2007: 411).

V naslednjem poglavju pa se obračam k izobraževalnemu diskurzu v učbenikih in vlogi ideologije kot osrednji točki zanimanja.

## IDEOLOGIJA IN IZOBRAŽEVALNI DISKURZ V UČBENIKIH

Opis neke kulture kot dobre, pozitivne, napredne vedno predpostavlja, da je kultura nekoga drugega slaba, negativna, zaostala. Nemara nikjer ni to bolj očitno kot v izobraževalnem sistemu. »Kar velja v naših izobraževalnih institucijah za legitimno znanje, je bilo vedno tesno povezano tako s skupinami, ki imajo ekonomsko, politično in kulturno oblast, kot tudi z boji, da bi te oblastne odnose spremenili,« pravi Michael W. Apple (1992: 8). Pomembna vprašanja so torej, kako je nadzor nad kulturo (tudi izobraževanjem) in pomeni povezan z reprodukcijo družbenoekonomskega sistema, zakaj in kako so določeni vidiki kolektivne kulture prisotni v šoli kot objektivno, dejansko znanje ter kako lahko uradno posredovano znanje reprezentira ideološke konfiguracije vladajočih interesov v družbi (Gramsci 1974). Nič manj pomembno ni, kako izobraževalni sistemi legitimirajo te omejene in pristranske standarde kot neproblematično resnico oziroma kako vsakodnevna temeljna pravila šol prispevajo k učenčevemu učenju teh ideologij, itd. Saj je nadzor znanja (tj. izbiranja, ohranjanja in posredovanja norm, vrednot, vsebin ...), ki proizvaja in ohranja dele družbe, ključen dejavnik pri povečevanju ideološke dominacije ene skupine ljudi nad šibkejšimi skupinami ljudi (prav tam). Dominantne skupine, ki imajo ekonomsko oziroma politično moč, lahko torej same razmeroma arbitrarno določajo, katere človeške razlike so v določenem trenutku zaželeno in katere ne. Razlike v družbeni moči, bogastvu in privilegijih so tako

<sup>13</sup> »Drugi« svet so bile vzhodnoevropske socialistične države.

<sup>14</sup> Svojo kritiko podkrepim s primerom Indije, ki ima danes vse značilnosti (»bedne vrste«) kapitalistične države (Ahmad v Jeffs 2007: 390).

pomemben izvor predsodkov, stereotipov, etnocentrizma, diskriminacije in tudi rasizma, kar dela njihovo subjektivno-objektivno eksistenco težko določljivo, za preučevanje izmuzljivo in za spreminjanje še težje dostopno (Nastran Ule 1999: 338).

## Prikrita vednost in ohranjanje družbene neenakosti v izobraževalnem procesu

Apple, ki predpostavlja, da je izobraževanje politični proces, ponuja nekaj pronicljivih odgovorov na zgornja vprašanja. Po njegovem mnenju je treba kritično raziskati prikriti kurikulum v šolah (implicitno učenje pravil in vrednot v šolah, saj ima vsak izobraževalni sistem svoje manifestne in latentne funkcije); problematizirati šolsko znanje (biti pozoren na podano snov, na vprašanja, od kod izhaja znanje, čigavo je to znanje, katere socialne skupine podpira, itd.); okrepiti zavedanje učiteljev o ideoloških in epistemoloških obveznostih, ki jih pri svojem delu sprejemajo in izvajajo. Branje nekega kulturnega teksta seveda ni (nujno) preprosto, interesi posameznih socialnih skupin v njih tudi niso jasno reprezentirani in učitelji in učenci ne sprejemajo posredovanih vsebin že *a priori* preprosto, nekritično, pasivno. Kljub temu pa gre za »precej pogosto prakso« (Apple 1992: 28–29). Kot ugotavljajo Carignan, Sanders in Pourdavood (2005: 13), zahtevata večkulturna in medkulturna kompetenca učitelja predvsem refleksijo definicij, ki so sicer razumljene in privzete povsem samoumevno. Primer, na katerega se bom še vrnila v nadaljevanju, je definicija in uporaba pojma »rase«. Čeprav so posamezne znanstvene discipline – predvsem antropologija in genetika – problematizirale in ovrgle ta pojem kot neustrezen, ga učitelji precej redno uporabljajo v navezavi na vsebino v učbenikih, v učnih pripravah in v interakciji z učenci. Kar samo potrjuje dejstvo, da »rase niso zapisane v genih, pač pa v diskurzu« (Miller v Čepič, Vogrinčič 2003: 320). Za javno nestrinjanje s problematičnimi, pogosto stereotipnimi, etnocentričnimi, diskriminatorskimi in rasističnimi stališči je namreč treba izzivati, oporekati in spodbijati »zdravorazumska« in večinska mnenja in norme, to pa je povezano z obsegom znanja in predvsem (samo)refleksije. Pri tem je vloga avtoritet, izobraževalnih procesov in zlasti medijev skoraj nujen, ne pa še zadosten pogoj antirasističnega in antistereotipnega diskurza kot opozicijskega prevladujoči množični dnevni reprodukciji stereotipnega konsenza. S tem nočem zanikati premikov, ki so se v smeri krepitve večkulturnih vsebin v izobraževalnem procesu vsaj v evropskem okolju zgodili. Kot ugotavlja Natalija Vrečer (2012: 48), so zahodne države (zlasti ZDA, Kanada, Velika Britanija, Nemčija ...) večkulturno izobraževanje<sup>15</sup> razvile že pred več kot desetletji, v Sloveniji pa se je njegove temelje začelo postavljati šele v 21. stoletju. Opisi drugih kultur so tako še vedno pogosto zreducirani zgolj na površinske informacije ali celo paternalistično folkloro, zelo redko pa vključujejo političnoekonomski vidik, zaradi česar tovrstni psevdovečkulturni programi napačno predpostavljajo kulturno enakost tam, kjer dejansko ne obstaja. Po mnenju Natalije Vrečer (2012: 53–56) marginalizirane etnične in kulturne skupine v osnovnošolske učne načrte in učbenike (za geografijo) niso vključene v zadostni meri; prisoten je impliciten etnocentrizem, saj zgolj z omembo perspektiv večinske populacije bralec dobi občutek, da so te pomembnejše ali celo edine vredne omembe; razen spoštovanja drugih kultur ni poudarjeno razvijanje tudi drugih medkulturnih kompetenc (zlasti empatije); uporabljeni so slabšalni izrazi za nekatera ljudstva, itd. Otroci bi torej morali v izobraževalnem sistemu, da bi lahko ustrezno funkcionirali v sodobnih večetničnih in večkulturnih okoljih, pridobiti znanje o vzorcih in praksah nadvlade, o predsodkih, stereotipih in diskriminaciji, o strukturnih dimenzijah etnocentrizma in rasizma v zahodnih kulturah, prav tako pa tudi možnosti za razvoj empatije in poudarjanja kulturne in etnične raznolikosti kot pomembnih vrednot.

Problem šolskega znanja, ki se poučuje v šolah, je torej treba pojmovati kot obliko širše distribucije dobrin, sredstev in védenja v družbi, zato ni samo analitični, tehnični in psihološki problem, pač

<sup>15</sup> Termin označuje »pristop k šolskim reformam, s katerimi želimo doseči enakopravnost v izobraževanju za vse rasne, etnične, kulturne in jezikovne skupine ter vse družbene razrede. Prav tako večkulturno izobraževanje spodbuja demokratičnost in družbeno pravičnost« (Banks v Vrečer 2012: 50). Več o tem v Vrečer (2012: 50).

pa (predvsem) ideološki. Kaj imajo specifične družbene skupine v specifičnih institucijah v specifičnih zgodovinskih trenutkih za legitimno vednost in kako ta vednost, kot jo razširjajo v šolah, posredno prispeva k ohranjanju ali krepitvi obstoječe institucionalne ureditve in (družbene, kulturne) neenakosti? Z diferencialnim razporejanjem posebnih vrst znanja, npr. z maksimizacijo produkcije tehnično kulturnega blaga (berimo uporabnega, aplikativnega), s kadriranjem glede na zahteve ekonomskega sektorja družbe in za moj primer morebiti najpomembnejšo naturalizacijo družbene in kulturne neenakosti predvsem preko ponotranjenja načel in pravil t. i. zdravega razuma. Še zlasti je to učinkovito, če se zgodi zgodaj v posameznikovem življenju. »V šolah to pomeni, čim prej, toliko bolje, pravzaprav od prvega dne v otroškem vrtcu« (Apple 1992: 43).

Pridobivanje »etničnega razpoloženja/vedenja« naj bi se pri otrocih začelo med četrtilim in sedmim letom starosti (van Dijk 1993: 202). Pri srednješolski starosti, torej okrog štirinajstega leta, naj bi otrok že imel izoblikovana znanje in odnos do drugih etničnih skupin, bodisi zaradi osebnega izkustva bivanja v večetničnih družbah ali diskurza v krogu družine, vrstnikov, otroških in mladinskih knjig in predvsem televizije ter svetovnega spleta. Nič manj pomembno pa ni, da je večina otrok, mladostnikov in mladih ljudi dnevno od devet pa tudi do dvajset ur soočenih s kompleksnim nizom diskurzivnih in ideoloških praks, ki so izkazane kot uradno znanje in hkrati tudi kot bolj difuzen sistem norm, vrednot in drugih socialnih kognitivnih okvirov, znotraj katerih se izoblikujejo interakcijske in interpretacijske sposobnosti posameznika in družbe. Naj ponazorim s podatkom: v Sloveniji naj bi mlad človek od začetka šolanja do konca srednje šole bolj ali manj temeljito predelal med 25.000 in 30.000 strani v učbenikih in delovnih zvezkih (Justin 2007: 3). In »premise, ki jih servira učbenik, so resnične *per definitionem*, čeprav je ta resničnost ideološki konstrukt, ki izhaja iz nesorazmerja moči med družbenimi skupinami« (Čepič, Vogrinčič 2003: 317). Naturalizacija posredovanih vsebin pomeni tudi že omenjene principe selekcije, torej izbora specifičnega znanja iz sicer mnogo večjega univerzuma možnega znanja, ki je vedno vrednotno determinirano. Nič manj pomembno od tega, kaj vsebine oziroma kulturni teksti (npr. učbeniki) povedo, pa ni, česa ne povedo oziroma kaj je iz njih izključeno, saj je ideologija v tekstu prisotna tudi v obliki »zgovornega molka« oziroma t. i. »odsotnosti«. Kot pravi Marx, realnost se ne šopiri naokoli s transparentom. In kontrast med prisotnostjo in odsotnostjo v tekstu ni oster, saj se implicitna vsebina teksta nahaja nekje na pol poti med prvo in drugo (Fairclough 1995: 5). Prav tako pomemben pa je tudi zgodovinski okvir, torej posamezna obdobja v preteklosti, v katerih so določeni pomeni postali izrazito šolski pomeni in vključeni v izobraževalni proces in v katerih je bil vzpostavljen »kanon« študijske literature kot podlage za učna gradiva in programe. Večina uradno odobrenih del prihaja iz vrst »mrtvih belih moških«, zato bi bilo treba več prostora nameniti ženskam, avtorjem iz neevropskega prostora, idr. (Taylor v Jeffs 2007: 329).

Izobraževalni sistem in znotraj njega učbeniki kot vir »uradnega«<sup>16</sup> znanja so med pomembnimi nosilci reprodukcije družbenih razmerij in kot taki prenašajo »določeno« vednost in znanje, ki sta vedno podvržena družbenim mehanizmom. Učbeniki večinoma ne oblikujejo etno-/evropocentričnih in rasiističnih stališč na ekspliciten način. Njihova vloga je pogostokrat veliko bolj subtilna in posredna. Toda nedvomno so učbeniki vselej »regulirano blago« in za šolajočo se mladino glavni vir informacij (Pirc 2010). Od avtorjev učbenikov seveda tudi ni mogoče pričakovati, da bi se povzpeli »nad ideologijo« in od tam delovali vrednotno indiferentno. To bi bilo še vedno ideološko in hkrati tudi neproduktivno, saj učenci ne bi pridobili vrednotnega okvira, ki jim šele omogoča razlikovati med sprejemljivimi in nesprejemljivimi vrednotnimi pozicijami in normami (Kovač idr. 2005: 34, 38). Ideološkost postane problematična na tisti točki, ko učbenik zavzame partikularne ideološke pozicije, ki temeljijo na izključevanju drugače mislečih in drugače »videčih« in ki zanikajo temeljne »univerzalne« (zahodne?) vrednote in pravice.

16 Tj. skozi procese družbene legitimacije konsenzualno prepoznanega kot ustreznega, sprejemljivega in »objektivnega«.



Naj si na tem mestu dovolim še en premislek, ki izhaja iz do zdaj napisanega. Srečevanje in predvsem sobivanje različnih kultur, ki je že obstoječa realnost tako v globalnih razmerah kot v okviru posameznih držav, od posameznika zahteva, da preseže navidezno »tujost« drugih kultur. Da bi to dosegli, moramo biti sposobni empatične izkušnje kot ene od bistvenih medkulturnih kompetenc<sup>17</sup> ali tistega, čemur Hans-Georg Gadamer pravi »zlitje obzorij« (v Hogan 2005: 6), torej gibanja po širšem obzorju, s čimer vse, kar smo dotlej samoumevno imeli za edino mogoče in pravilno ozadje vrednotenja, uskladiamo z drugačnim ozadjem druge kulture in priznamo, da je naš način vrednotenja zgolj ena od mnogih različnih možnosti. To zahteva tudi razvoj novih besednjakov primerjav, da bi z njimi sploh lahko izrazili takšna nasprotja, in novo zmožnost presoje, ki jo dosežemo s transformacijo naših prvotnih standardov (Taylor v Jeffs 2007: 331). Človek, ki se poglobljeno ukvarja z raziskovanjem druge kulture, se pri tem tudi sam spremeni in je ne sodi več zgolj z vidika prej lastnih standardov. Znani citat nobelovca za literaturo (1976), Saula Bellowa: »Ko bodo Zulujci ustvarili Tolstoja, ga bomo vsi brali,« nasprotno razkriva vso globino etno-/evropocentričnega diskurza, saj temelji na prepričanju, da morajo biti vsa odlična dela ustvarjena v nam znani obliki ter da zulujska kultura ni še ničesar prispevala k svetovni kulturi in mora to šele storiti.

## Učbeniki kot akter etno-/evropocentrične in rasistične socializacije

Raziskave kažejo, da učbeniki (in delovni zvezki) o geografiji, zgodovini in družbenih vedah (van Dijk 1987, 1993, 1998; Društvo Afriški center 2010) ter tudi učitelji (Carignan, Sanders, Pourdavood 2005) v različnih evropskih državah izražajo določeno stopnjo etno-/evropocentrizma in rasističnega diskurza z uporabo specifičnih jezikovnih strategij, konceptualnih nejasnosti, reprezentacij v slikovnem gradivu, vsebine in širšega tekstualnega konteksta. To pomeni, da v analizo tekstov vključimo tudi analizo institucionalnih in diskurzivnih praks, v katere so ti teksti umeščeni (Fairclough 1995: 9). Na semantični ravni so tako pogosto uporabljeni: posploševanje in stereotipizacija,<sup>18</sup> barvni simbolizem v jeziku, pozitivni izrazi v opisih Neevropcejev, ki bi bili v opisih Evropejcev sicer izpuščeni, navidezno zanihanje ali priznanje lastne etno-/evropocentrične pozicije, ublažitve, nasprotno primerjave, posredne, implicitne in nejasne izjave, pretiravanja in polarizacije ter preusmeritve pozornosti (poudarjanje problemov). Problematična je tudi uporaba izrazov, kot so »delitev«, »konflikt«, »antagonizem«, ki zakrivajo akterja dejanja in predpostavljajo vzajemno povzročitev problemov. Z istim namenom je problematična tudi uporaba trpnika in evfemizmov, kjer se zamolči akterja dejanja, kadar gre za negativna dejanja Evropejcev, in uporaba tvornika, kadar gre za njihova pozitivna dejanja (npr. vloga ameriške vlade v pogajanjih s staroselci) ter obratno, itd. Kot je razvidno iz osmih zgoščenih ugotovitev v nadaljevanju, se t. i. »ideološki kvadrat« (van Dijk 1998: 267), ki vsebuje štiri glavne poteze v strategiji ideološke komunikacije,<sup>19</sup> manifestira skoraj v sleherni od njih.

17 Medkulturne kompetence so ena od glavnih tem večkulturnega izobraževanja; brez razvite empatije tudi drugih medkulturnih kompetenc ne moremo razviti. Ta razvoj pa bi se moral začeti razvijati že pri otrocih v vrtcu in pri vseh predmetih v šoli (Vrečer 2012: 50–51).

18 Opisi in fotografije npr. Afričanov v grmovju in divjini, Inuitov v iglujih, ameriških staroselcev v rezervatih, temnopoltih v getih, itd., so izrazito redukcionistični in pristranski. S selekcijo informacij pa se izpušča pozitivna dejanja ali vloge Neevropcejev in migrantov, običajno niso poudarjene pozitivne vrednote posameznih neevropskih kultur, prav tako njihovi življenjski slogi niso predstavljeni kot potencialno alternativni prevladujočemu zahodnemu, njihova pomembna intelektualna, umetniška in druga imena so največkrat izpuščena, itd., prav tako »nevturalne« teme, ki bi obravnavale vsakdanje življenje v teh kulturah.

19 Te štiri poteze »ideološkega kvadrata« so: 1) izražanje/poudarjanje pozitivnih informacij o »nas«; 2) izražanje/poudarjanje negativnih informacij o »njih«; 3) prikrivanje/omiljevanje pozitivnih informacij o »njih«; 4) prikrivanje/omiljevanje negativnih informacij o »nas« (van Dijk 1998: 267).

- 1) Etno-/evropocentričen in rasističen diskurz je prepoznaven v dvoumni, nejasni uporabi konceptov, kot so kultura, civilizacija in »rasa«. <sup>20</sup> Obenem je »raso« kot družbeni oziroma politični konstrukt vse bolj začel nadomeščati (ravno tako politični) koncept kulture, ne da bi se s tem bistveno spremenil sam diskurz. Skratka, kultura je postala sinonim za »raso« (Kuper v Kereži 2005). To ujemanje »rase« in kulture je, kot pravi Muršič (2005: 42), najbolj problematično, saj je temelj rasistične ideologije, ki ga slovenski geografski učbeniki še vedno reproducirajo.
- 2) Neustrezna, nesmiselna, žaljiva, zastarela in tudi nevarna je uporaba rasne paradigme, saj delitev na »rase« oziroma po barvi kože v kulturnem in biološkem smislu ne pomenita ničesar in nikakor ne pojasnita človeške raznolikosti. Prikaz obstoja »ras« tako deluje kot samoumevno znanstveno dejstvo (sicer iz 19. stoletja), ne pa kot ideološki učinek samega rasizma. Poleg tega je rasistični diskurz še dodatno utrjen s kategorizacijo manjših »rasnih« skupin, »rasnih drobcev« in »mešancev« različnih »ras« kot povsem neustreznih klasifikatorjev, ne da bi bilo obenem problematizirano tudi socialno razlikovanje med njimi. Takšno kategoriziranje pogosto napeljuje na sklep, da je biološko mešanje (tudi v pomenu priseljevanja) oblika polucije in redčenja, ki kvari homogenost velikih »ras«, kar pomeni nevarnost za svet, ki ne bo več urejen, razumljiv in predvidljiv (van Dijk 1987, 1993). Predvsem pa je neustrezno in nevarno, da mladi spoznavajo prve lastnosti etničnih skupin na drugih kontinentih najprej po barvi kože in fiziologiji, saj družbene organizacije ni mogoče razlagati z barvo kože ali s kakršnimi koli »rasnimi« termini (Društvo Afriški center 2010: 14).
- 3) Uporabljeno je načelo linearne evolucije in hierarhičnega koncepta kulture, po katerem druge kulture »zaostajajo« (za »nami«). Takšen diskurz temelji na medkulturni in medčasovni transmisiji in se kaže v izjavah, da so »na najnižji razvojni stopnji tista [ljudstva], ki se ukvarjajo z nabiralništvom«, da ti ljudje »prihajajo v stik s civilizacijo samo ob velikih rekah in v posameznih tržnih krajih«, da so nekatera ljudstva »gospodarsko in kulturno manj razvita od drugih«, itd. Za takšno stanje naj bi bili zaradi neizobraženosti, pasivnosti, itd., predvsem sami krivi, saj se običajno izpušča družbenoekonomske razlage takšne situacije, zlasti vlogo kolonializma in sodobnih neokolonialnih oblik izkoriščanja s strani zahodnih podjetij in mednarodne trgovine. Problematična je tudi uporaba izraza »pleme« <sup>21</sup> namesto ljudstvo, etnija ali narod, in geografskih poimenovanj, ki so neustrezni, nekorektni, neprimerni, kolonialni, zastareli, nesmiselni in tudi žaljivi. Poleg tega so bili v znanstvenih krogih že pred desetletji zavrženi zaradi skritih negativnih pomenov oziroma ideološke nabitosti ter nikakor ne sodijo v učbenike 21. stoletja (npr. Grmičarji/Bušmani, Hotentoti, <sup>22</sup> Pigmejci, Bantu črnci, itd.; črna Afrika/črna celina; prava in neprava Afrika <sup>23</sup>). V prvem primeru gre namreč za preživeto in neustrezno evropocentrično gradacijo ljudstev na »narod – ljudstvo – pleme«, to pa še utrjuje splošne stereotipe o določeni celini in njenih prebivalcih ter hkrati ohranja mit o njihovi »primitivnosti in nerazvitosti« (Društvo Afriški center 2010: 10).
- 4) Dekontekstualizacija, dehistorizacija in kratek zgodovinski spomin se kažejo na način, da se zgodovina neevropskih narodov in kultur začne z obdobjem »našega« stika z njimi (»mi,

20 Pogosto je civilizacija sinonim za tehnologijo in napredek, skratka za Evropo/Zahod, kultura pa za »izdelovanje posode in nakita«, torej za neevropske narode, s čimer se poskuša neevropske narode in ljudstva trivializirati.

21 Izraza pleme se ne uporablja niti za označevanje etničnih skupin niti za označevanje lokalnih skupin, zato je ustrezen izraz ljudstvo. Edina mogoča raba te besede je v pridevniški obliki, kadar označujemo plemensko družbeno ureditev, ki temelji na pripadnosti liniji sorodnikov z nekim skupnim prednikom (Društvo Afriški center 2010: 24).

22 Za »Grmičarje« in »Hotentote« (bursko jecljavci) je zdaj v rabi primernejši izraz Khoisan, za »Pigmejce« pa najpogosteje Baka (oziroma M'Baka) ali Mbuti (Društvo Afriški center 2010: 13).

23 Svet pod Saharo, t. i. »črna Afrika«, naj bi bil po tej delitvi očitno drugačen kot svet nad njo in predvsem »pravi«. Afrika je kot vsa druga geografska območja raznovrstna, zato je skrajno problematična podmena, da bi morala biti uniformna, govorjenje o Afriki kot edini »pravi« Afriki in podobno pa je politično skrajno nekorektno (Društvo Afriški center 2010: 15).

Evropejci smo odkrili Ameriko, Afriko, Avstralijo« ...). To so zgodovinske netočnosti, saj je njihova zgodovina pred kolonizacijo in po njej običajno zanemarjena, pogosto pa so »novo odkrita« območja opisana tudi z gledišča njihovih »ugodnosti« za naselitev Evropejcev. Skladno s tem so evropske države in kulture sistematično predstavljene bolj obsežno, bolj naklonjeno, bolj pozitivno ali vsaj nevtralnno in tudi superiorno do drugih (van Dijk 1987, 1993), dosežki neevropskih etnij in kultur pa ignorirani. V opisanih primerih bi bilo korektnije govoriti o vzpostavitvi intenzivnejših stikov (gospodarskih, političnih, itd.) med državami, ljudstvi oz. narodi ali kulturami (Društvo Afriški center 2010: 12).

- 5) Legitimira ali vsaj relativizira se kriminalne razsežnosti evropske kolonialne in imperialne vladavine, ki naj bi neevropskemu svetu prinesla predvsem veliko dobrega. Krištof Kolumb in njegovi nasledniki so na primer zelo pogosto predstavljeni kot heroji, raziskovalci in odkritelji, pogosto podcenjeno ali sploh zamolčano pa je njihovo genocidno ravnanje, kar je ideološka izbira in ne tehnična potreba, saj se z njo opravičuje storjeno. Neredek je tudi napačen pogled na Ameriko pred prihodom Evropejcev kot redko naseljeni pokrajini, kar zakriva dejstvo o veliki in stalni naseljenosti, urbanizaciji, kompleksnih kmetovalskih in družbenih sistemih, medcelinskih komunikacijskih poteh, znanstvenih dosežkih, itd. (Jeffer 2007: 462).
- 6) Poudarjene so kulturne in družbene razlike med »nami« in »njimi« (»so zelo drugačni od nas«), pri čemer so opisi teh razlik hierarhično vrednoteni,<sup>24</sup> pogosto negativni, stereotipni, ahistorični ali zgodovinsko netočni in zanemarjajo problem diskriminacije, rasizma,<sup>25</sup> suženjstva, nasilnega osvajanja in neokolonialnega izkoriščanja. Kolonialna zgodovina je v večini šolskih knjig vsaj v nekdanjih kolonialnih državah opisana predvsem v obliki pustolovščin, raziskovanj, pogumnih in junaških dejanj in razširjanja »civiliziranosti« evropskih držav in v zelo skromni meri kot izraz izkoriščanja, suženjstva in nasilja. Kolonizirana ljudstva so še vedno okarakterizirana kot »primitivna«, »nerazvita«, »zaostala«, »v razvoju«, »tretji svet«, »potrebna pomoči«. Obenem pa sta zaradi njihove revščine, bolezni, vojn, lakote, naravnih katastrof, nepismenosti, pasivnosti, brezizhodnosti ... poudarjeni evropska/zahodna filantropija in paternalistična, plemenita (humanitarna) »pomoč« tem državam. Manjka pa problematizacija aktualne politične ekonomije na globalni ravni, njenih geostrateških interesov in neenakomerne razporeditve virov in moči predvsem z vidika globalnih trgovinskih in finančnih institucij (Mednarodni denarni sklad, Svetovna banka, Svetovna trgovinska organizacija) ter dominantnih nacionalnih držav (Društvo Afriški center 2010: 37). Ti opisi tako podlegajo homogenizaciji in etnocentrični univerzalnosti, v skladu s katerima ni praktično nobenih razlik med posameznimi neevropskimi narodi in kulturami ali skupinami znotraj njih (v smislu, da so **vsí** Afričani lačni, da so **vse** neevropske ženske diskriminirane, itd.). Namesto tega bi morale biti preučevane prav ekonomske, pravne, religiozne in družinske strukture teh družbenih razmerij. Prav tako ni največkrat ničesar zapisanega o kulturnih in drugih podobnostih (industrializacija in urbanizacija, prispevek globalnemu tržišču, zahodni način življenja, bogastvo elit, itd.). Predvsem pa primanjkuje pozitivnih zgodb, ki bi prikazovale dosežke in države s kontinuiranim pozitivnim gospodarskim razvojem, družbenopolitično ureditvijo ... (v primeru Afrike npr. Bocvana, Namibija, Mauritius, itd.) in bi lahko delovale motivacijsko tudi za učence oziroma dijake (Društvo Afriški center 2010: 40).

<sup>24</sup> Kriterij primerjave ostajajo evropske norme kot napredne in »razvite«. Neevropski narodi so pogosto etnocentrično opisani tudi na način eksotizacije, torej s pomočjo za Evropejce najbolj nenavadnih, zanimivih, pa tudi nesprijemljivih kulturnih praks, na primer nenavadnih obredov, eksotičnih telesnih praks (npr. poslikavanja telesa in ne »uporabe ličil«) in (ne)oblek, »spojenosti« z naravo, življenja od zemlje in obrti, brez (ali malo) tehnologije in v kočah (ne v hišah), divjosti, kanibalizma ali pa tudi telesnega zanemarjanja, nepismenosti, pomanjkanja izobrazbe in dela, revščine, lakote, bolezni, kriminala, skratka njihove brezperspektivnosti, pasivnosti, apatičnosti in »zaostalosti«.

<sup>25</sup> Največkrat rasizem, pa tudi diskriminacija, sploh nista omenjena, kaj šele problematizirana.

- 7) Nejasno predstavljena, običajno pa kar izpuščena, so dejstva o tem, da sta bogastvo in industrijski razvoj Evrope v veliki meri posledica nekdanjega izkoriščanja neevropskega sveta in ljudi. Zamolčana so tudi sodobna neokolonialna razmerja, ko je neokolonialna država formalnopravno neodvisna in mednarodno suverena, realno pa ekonomsko in politično vodena od zunaj. Pri tem se tuji kapital uporablja za izkoriščanje in ne razvoj neokolonialne države, kar pogloblja razlike med revnimi in bogatimi državami, izvažata družbene konflikte zahodnega sveta in odlaga soočenje z vprašanji globalne revščine in konfliktov (v Jeffs 2007).
- 8) Nacionalna gibanja in osvobodilni boji za neodvisnost neevropskih narodov in držav tako v preteklosti kot tudi danes (zlasti v Afriki) so pogosto predstavljeni kot »primitivni izbruhi divjih in fanatičnih plemen«.

## SKLEP

Opisane prevladujoče predstave o drugih etničnih skupinah v šolskih učbenikih in drugem gradivu, namenjenem otrokom in mladostnikom, imajo nedvomno pomembno vlogo v procesu etnocentrične in rasistične socializacije in posredovanja znanj in stališč mlajšim generacijam. Prav tako se ustrezno vključujejo v splošen negativen okvir prikazovanja pripadnikov manjšinskih in drugih etničnih skupin kot nagnjenih h kriminalu in k nasilju, revščini, primitivizmu, nesposobnosti ali v najboljšem primeru eksotičnosti tako v procesih socializacije in izobraževanja kot tudi množičnih komunikacij na eni strani in nevtralnih ali pozitivnih okvirih prikazovanja zahodnih, evropskih držav in kultur na drugi.

Osupljiva podobnost med vsebinami stereotipov ali asociacij v vsakdanjem govoru, medijih, učbenikih in literaturi napeljuje na misel, da sodobna stališča o manjšinskih skupinah niso oblikovana samo na osnovi vsakdanjih izkušenj ali medijskih povzetkov, ampak da obstaja sistematičen, historičen temelj sodobnih kulturnih definicij tujcev in tujega (van Dijk 1987: 47).

Ne torej samo o etničnih manjšinah in migrantih, ampak o Neevropejcih na sploh. Kot piše Janez Pirc (2010), bi bilo takšne izkrivljene poglede – vsaj glede Afrike – pričakovati v pozni fazi evropskega kolonializma, zelo težko pa jih je sprejeti na začetku 21. stoletja. Še toliko bolj presenetljiva je ugotovitev, da so slovenski geografski učbeniki prevzeli nekatere poglede na Afriko, ki bi jih lahko pričakovali v nekdanjih kolonialnih državah, ne pa v državi s socialistično preteklostjo in tudi z izkušnjo neuvrženosti, ki je vendarle temeljila na solidarnosti in razumevanju za ta del sveta. Potemtakem učbeniki ne samo reproducirajo etnični in »rasni« *status quo*, ampak pogosto aktivno prispevajo k njegovi legimitaciji namesto k njegovi kritiki ter spodbujanju večetnične in večkulturne družbe. Kar je nedvomno težje, saj je zlasti koncept »rase« globoko zakoreninjen v človeško percepcijo sveta, zaradi česar se je izredno težko znebiti prepričanja o skladnosti med vidnimi fizičnimi značilnostmi in skupinami ljudi, ki poseljujejo določen prostor (Caspari v Muršič 2005: 45). Nemara to še zlasti velja tako za osnovnošolsko in srednješolsko kot tudi univerzitetno raven izobraževalnega sistema. Ta v najboljšem primeru evropske otroke uči biti »sodobni«, »tolerantni« in »napredni« Evropejci, ki zavračajo tradicionalni manifestni, ekstremni rasizem, ne pa tudi sodobnega simbolnega, subtilnega, latentnega, kaj šele da bi jih naučil izzivati sistem evropske dominacije in njegov inherentni stereotipni, diskriminacijski in nemalokrat tudi rasistični diskurz.

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## SUMMARY

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### REPRESENTATIONS OF THE NON-EUROPEAN WORLD IN THE EDUCATIONAL SYSTEM: TEXTBOOKS AS AN ACTOR OF ETHNOCENTRIC AND RACIST SOCIALIZATION

Ksenija ŠABEC

The article discusses a question of the ideological procedure of forming meanings in the field of production, distribution and consumption of images of the ethnic "Other" through language. The main focus is on processes of socialization in a broader sense and the educational system as one of the "ideological state apparatuses" in a narrower sense. (Ethnic) identities as social forms are an ideological concept in the historical process of cultural constitution, therefore educational discourse – as well as mass media – can act as an important generator of stereotypical, negative, as well as discriminatory and racist representations of other ethnic groups and non-European, immigrant and minority groups in particular. While there is a considerable amount of literature in the field of mass media research, the educational system – at least in Slovenia – remains a relatively weakly examined area. However, children's and school books, geography and history textbooks in particular, consistently express ethnocentric and Eurocentric standpoints, stereotypical images and even racist discourse, or at least enable the defining of potentially possible and above all exceedingly plausible situations, which leads to negative, Eurocentric and racist conclusions about non-Europeans and immigrants. This can be achieved by means of particular linguistic strategies on the semantic level, selection of illustrative material, and especially at the level of contents and wider textual context.

# RAZPRAVE V AMERIŠKEM SENATU O REFORMI PRISELJENSKE ZAKONODAJE V ZDA V OBDOBJU 2012–2013

Maja RAMOVŠ<sup>1</sup>

COBISS 1.04

## IZVLEČEK

### Razprave v ameriškem senatu o reformi priseljenke zakonodaje v ZDA v obdobju 2012–2013

V prispevku so predstavljene ključne spremembe, ki so se na področju priseljenke zakonodaje zgodile v ZDA od predsedniškega mandata Billa Clintona do danes, ko je število nedokumentiranih priseljencev v ZDA preseгло enajst milijonov in je potreba po ureditvi sistema priseljevanja nujna tako z ekonomskega, varnostnega kot s socialnega vidika. Prispevek zato ponuja vpogled v analizo sprejemanja nove priseljenke zakonodaje v predsedniškem mandatu Baracka Obame ter v načrtovane spremembe sistema, sprejete v Senatu ameriškega Kongresa. V zaključku prispevka so tudi predvidevanja, kaj lahko pričakujemo v prihodnje, ko se bo aktualna razprava preselila v Predstavniški dom Kongresa.

KLJUČNE BESEDE: priseljevanje, ZDA, priseljenke zakonodaja, nedokumentirani priseljenci, reforma sistema priseljevanja

## ABSTRACT

### Debates in the U.S. Senate on Immigration Reform 2012–2013

The article provides an insight into United States' immigration system changes, from the times of Bill Clinton's presidency until today, when the number of undocumented immigrants in the U.S. has surpassed eleven million and the need to regulate immigration system is essential not only from an economic and safety but also from social point of view. Article's contribution is an analysis of the implementation processes of new immigrant legislation in the presidential mandate of Barack Obama and an overview of the planned legislation changes that were made in the U.S. Senate. In the conclusion, we also offer a forecast of what is to expect in the field of immigration legislation, once the debate is moved to the House of Representatives.

KEY WORDS: immigration, USA, immigration legislation, illegal immigrants, undocumented immigrants, immigration system reform

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## UVOD

Ljudje so v zgodovini priseljevanja v Združene države Amerike prihajali s podobnimi cilji in idejami o boljšem in svobodnem življenju v državi, ki temelji na vrednotah pravičnosti in enakosti ter omogoča priložnosti za dostojen socialnoekonomski položaj posameznikov. Trenutni sistem priseljevanja v ZDA je vse prej kot idealen: družine priseljencev so prisilno ločene, priseljeni nedokumentirani delavci dnevno izkoriščani, ljudje umirajo med poskusi prečkanja meja, nedokumentirani priseljenci so vsakodnevno diskriminirani, njihovo število pa je doseglo enajst milijonov.

Prenovljeni sistem priseljevanja bi ne uredil samo položaja številnih priseljskih družin, temveč bi se lahko zvišalo tudi število davkoplačevalcev, ameriška podjetja bi zaradi urejenega položaja priseljskih delavcev lažje zaposlovala in tekmovala na mednarodnem trgu, pa tudi registracija številnih nedokumentiranih priseljencev bi prispevala k varnosti ZDA. Potreba po ureditvi sistema priseljevanja je nujna tako z ekonomskega, varnostnega kot s socialnega vidika. Število priseljencev v ZDA je sredi devetdesetih let 20. stoletja postalo primerljivo s številom priseljencev v obdobju množičnega priseljevanja na začetku stoletja. ZDA so se tako v devetdesetih letih začele spopadati z izzivom, kako učinkovito regulirati priseljevanje ter ob tem čim bolj izkoristiti njegove pozitivne ekonomske in socialne vidike (Klemenčič 2010: 243).

Terminologija za označevanje priseljencev, ki so se v ZDA priselili nezakonito, se je ves čas spreminjala. Tako v zakonodaji kot v zakonodajnih predlogih se je med predsedniškima mandatoma Billa Clintona in George W. Busha uporabljal izraz 'nezakoniti priseljenci' – *illegal immigrants*, medtem ko administracija predsednika Baracka Obame uporablja izraz 'nedokumentirani priseljenci' – *undocumented immigrants*. To izrazoslovje je povzela tudi slovenska znanstvena publicistika (Medica 2007: 125; Pajnik idr. 2010: 158; Zavratnik 2010: 174).

## REFORMA PRISELJENSKE ZAKONODAJE MED PREDSEDNIŠKIM MANDATOM BILLA CLINTONA

V drugi polovici devetdesetih let, ko je dobro ekonomsko stanje države terjalo konkretne spremembe v politiki priseljevanja in se je množici priseljencev pridružilo veliko število beguncev, je takratni predsednik ZDA Bill Clinton dejal:

Potrebujemo razumen pristop k reševanju problematike priseljevanja. Pristop mora biti odprt, nedogmatičen in nepristranski. Pri reševanju nezakonitega priseljevanja moramo biti trdni, a razumni. Poskrbeti moramo, da čim več priseljencev, ki želijo postati državljani ZDA, to lahko postane kar se da hitro, da lahko Američani vidijo, da je to del procesa ameriške zgodovine in da je to dobro za našo državo. (Presidential Campaign Websites 1996)

Predsednik Bill Clinton je 30. septembra 1996 podpisal zakon o reformi priseljevanja in odgovornosti priseljencev (Illegal Immigration Reform and Immigrant Responsibility Act 2006). Namen zakona je bil urediti položaj »nezakonitih«,<sup>1</sup> t. j. nedokumentiranih priseljencev. Po tem zakonu vsaka oseba, ki je nezakonito ostala v ZDA vsaj sto osemdeset dni, a manj kot eno leto, še tri leta po izgonu iz ZDA ni smela zaprositi za ponovni vstop v državo. Tisti, ki so nezakonito bivali v ZDA več kot leto dni, pa so morali ostati zunaj meja ZDA najmanj deset let, razen če so jih uradno pomilostili. Če bi se takšna oseba vrnila v ZDA brez pomilostitve, pa bi ji to onemogočilo, da bi za pomilostitev uradno zaprosila prej kot v desetih letih. To je dejansko pomenilo trajno prepoved zakonitega vstopa posameznika v državo. Te omejitve so veljale ne glede na to, ali je oseba imela zakonca in/ali otroke, ki so bili državljani ZDA. Pred uvedbo

1 Prevod izhaja iz naslova zakona, ki se glasi Illegal Immigration Reform and Immigrant Responsibility Act.



te reforme so takojšen izgon iz države omogočila le kazniva dejanja posameznikov, kaznovana s petimi ali z več leti zapora. V skladu s Clintonovim zakonom iz leta 1996 pa so postali tudi manjši prekrški, kot je kraja v trgovini, podlaga za izpolnjevanje pogojev za izgon iz države. Zakon je veljal tudi za tiste priseljence, ki so bili poročeni z ameriškimi državljanji oz. so imeli otroke z ameriškim državljanstvom. Poleg tega se je zakon uporabljal retroaktivno tudi za vse tiste, ki so že bili obsojeni za kazniva dejanja, ki so zahtevala izgon iz države. To je vključevalo številne zakonite prebivalce ZDA, ki so storili prekrške že pred desetletji. Kljub razsodbi Vrhovnega sodišča leta 2001, ki je izvrševanje na podlagi retroaktivnosti ukinilo, je bil nadzor nad uporabo zakona šibak, zato se je kot tak še precej bolj intenzivno uporabljal po 11. septembru 2001 (Federation for American Immigration Reform 2008).

Kljub dejstvu, da je reforma vpeljala nekatere zelo stroge omejitve in predvsem možnosti za izgon nedokumentiranih priseljencev, kot posledica zakona ostaja dejstvo, da je bilo od leta 1996 iz države izgnanih več kot milijon nedokumentiranih priseljencev (Klemenčič 2010: 243).

## Obdobje priseljske zakonodaje po septembru 2001

Leta 2000 se je z izvolitvijo George W. Busha Jr. zdelo, da bo njegova izvolitev nekakšna prelomnica v politiki priseljevanja v ZDA. O tem tudi piše v svoji knjigi spominov, kjer pravi:

Ko sem se potegoval za predsedniško mesto, je nezakonito priseljevanje postalo že resen problem, ki se je le še večal. Naša ekonomija je potrebovala delavce, a naši zakoni se niso učinkovito izvajali, človekove pravice pa so bile kršene. Zato sem se v svoji kampanji leta 2000 zavzel, da se bom lotil te problematike. Bil sem prepričan, da lahko poiščemo razumno rešitev, ki bo odražala naše nacionalne interese in obenem temeljila na naših vrednotah. (Bush 2010: 302)

Petintrideset let po zadnjih večjih spremembah sistema priseljevanja in po dveh desetletjih bolj samozavestnega, a predvsem neučinkovitega represivnega pristopa do politike priseljevanja je republikanski predsednik George Bush ponujal upanje, saj je priseljevanju pripisoval pomembne koristi za ameriško gospodarstvo. Zavzel se je za nov in obsežen program začasnih delavcev in prepoznal potencial latinskoameriških volilnih glasov. Vendar so po terorističnih napadih septembra 2001 propadla vsa prizadevanja za prenovno priseljske politike. Po septembru 2001 je Kongres sprejel vrsto strogih ukrepov za poostreitev varnosti na mejah, omogočil lažje zbiranje in izmenjavo informacij o domnevnih teroristih ter razširil vladna pooblastila za priprtje in izgon priseljencev (Rosenblum 2011: 1).

Teroristične napade 11. septembra 2001 so izvedli v ZDA povsem zakonito priseljeni arabski študenti. Zaradi zagotavljanja nacionalne varnosti ZDA so napadi v ospredje postavili potrebe po temeljitih spremembah odnosa oblasti do priseljevanja. Ustanovljeno je bilo Ministrstvo za domovinsko varnost, pod katerega so spadale tudi vse pristojnosti agencij, ki so se do nastanka ministrstva ukvarjala s priseljevanjem. Prvi sprejeti zakon je bil t. i. patriotski zakon iz leta 2001, katerega bistvo je bilo omogočiti sodelovanje različnih agencij v boju proti terorizmu. Povečal je zaupnost delovanja organov pregona in organov, ki nadzirajo priseljevanje, ter jim omogočil pripor in izgon priseljencev, osumljenih dejanj, povezanih s terorizmom. Leta 2003 je Ministrstvo za domovinsko varnost predstavilo načrt, imenovan Endgame, katerega glavni cilj je bil do leta 2012 iz ZDA izgnati vseh 12 milijonov nedokumentiranih priseljencev. Skladno z načrtom je bil njegov cilj razširjen tudi na »cilje, prvič izražene v zakonu iz leta 1978«. Poglavitni cilj tega načrta je torej bil »odstraniti vse odstranljive tujce«, vključno z nedokumentiranimi ekonomskimi priseljenci in s tujci, ki so storili kazniva dejanja, prosilci za azil ali potencialnimi teroristi (Klemenčič 2010: 243).

Nezakonito priseljevanje se je nadaljevalo kljub vsem poskusom, da bi ga omejili. George W. Bush je v svoji knjigi spominov opisal svoja prizadevanja za spremembe priseljske zakonodaje po terorističnih napadih. 15. maja 2006 je, prvič v zgodovini, na temo priseljevanja po televizijskih ekranih

nagovoril Američane z naslednjimi besedami: »Smo narod, ki temelji na zakonih in zato jih moramo izvrševati. Prav tako pa smo narod priseljencev in spoštovati moramo našo tradicijo, ki je okrepila našo državo na toliko različnih področjih.« Predstavil je tudi načrt, ki bi prenovil sistem priseljevanja in je temeljil na petih področjih: prenovi varnosti na mejah, programu začasnih delavcev, bolj strogemu nadzoru nad zaposlovanjem priseljskih delavcev, asimilaciji priseljencev z obveznim znanjem angleškega jezika ter ureditvi statusa skoraj dvajsetih milijonov nezakonitih<sup>2</sup> priseljencev. Deset dni po njegovem predlogu je bil osnutek zakona v Senatu tudi potrjen, a ta pozneje v Predstavniskem domu ni bil izglasovan (Bush 2010: 303–306).

Tako se je priliv nedokumentiranih priseljencev le še povečeval, ti pa so imeli tudi zelo malo možnosti, da bi v prihodnosti pridobili državljanstvo ZDA (le če bi ameriški Kongres sprejel zakon o pomilostitvi, podoben tistemu iz leta 1986) (Klemenčič 2010: 243).

## SPREMEMBE PRISELJENSKE ZAKONODAJE MED OBEMA PRESEDNIŠKIMA MANDATOMA BARACKA OBAME

Barack Obama je že pred nastopom svojega predsedniškega mandata še v vlogi senatorja, skupaj s prihodnjim predsedniškim protikandidatom, republikanskim senatorjem Johnom McCainom ter z demokratskim senatorjem Edwardom Kennedyjem, odigral ključno vlogo pri podpiranju dvostrankarskih prizadevanj za prenovo sistema priseljevanja. Politična vizija in govori predsednika Baracka Obame v mnogih pogledih izhajajo iz ameriške zgodovinske simbolike, ki ji lahko sledimo v ameriški politiki – od ameriških sanj do ameriške družbe, utemeljene na narodu priseljencev. Njegova vizija politike priseljevanja temelji na pojmu t. i. zasluženega državljanstva. To vizijo deli s številnimi demokrati pa tudi republikanci, kot npr. s predhodnim predsednikom Georgom Bushem ml. Pojem zasluženega državljanstva izhaja iz ideje, da nedokumentirani priseljenci v ZDA zaslužijo priložnost, pot do državljanstva, če izpolnjujejo določene pogoje. Ti pogoji vključujejo dokaze, da so dobri delavci, da plačujejo globe zaradi kršenja zakonov o priseljevanju, da se naučijo angleški jezik in prestanejo preverjanje njihove preteklosti. Zaslužno državljanstvo ne pomeni pomilostitve enajstih milijonov nedokumentiranih priseljencev v ZDA, pač pa jim ustvarja možnosti za pridobitev državljanstva. Kljub temu tako demokratska kot republikanska stran nasprotujeta odobritvi kakršnekoli vrste državljanstva nedokumentiranim priseljencem. Metoda za premagovanje omenjene ovire pri kampanji za reformo sistema priseljevanja v njegovem prvem mandatu je bila, da se je osredotočil na poostreitev varnosti na ameriško-mehiški meji. Prav vprašanje varnosti meja je bila za republikance priložnost pri izpostavljanju neučinkovitosti predsednika Obame (Dorsey, Diaz Barriga 2007: 90–91).

Predsednik Obama se je zato na svojem prvem obisku El Pasa na ameriško-mehiški meji, v drugi polovici prvega mandata, maja 2010, pohvalil s povečanjem števila mejnih patroljnih agentov, z obnovo meje, ki ločuje obe državi, ter s povečanim številom pregledanih tovorov. »Glede samega izvrševanja poostrenega mejnega nadzora smo storili več od tistega, kar je republikanska stran zahtevala zato, da bi podprla širšo reformo sistema priseljevanja,« je dejal predsednik Obama.

Toda čeprav smo odgovorili na njihove zahteve in pomisleke, slutim, da bodo nekateri še vedno želeli povečati zahteve. [...] Morda bodo sedaj zahtevali, da izkopljemo obmejni jarek. Morda bodo potem zahtevali aligatorje v jarku. Vprašanje pa ostaja, ali so tisti, ki so nasprotovali reformi v imenu zahtev po izvrševanju poostrenega mejnega nadzora, sedaj pripravljeni, da se usedejo za mizo in dokončajo začeto delo. (Obama v Foley 2013)

2 Zanimivo je, da nekdanji predsednik George W. Bush v svojih spominih uporablja izraz *illegal immigrants*, kot npr.: »I disagree ... There is a rational legal ground between granting and automatic path to citizenship for every illegal immigrant and a program of mass deportation« (Bush 2010: 303).

Obama je poudaril tudi časovno primernost in nujnost reforme v zaostrenih gospodarskih razmerah. Zatrdil je, da bi reforma pomagala h krepitvi srednjega razreda, saj bi se ta okreplil s številom nedokumentiranih delavcev, ki bi jim bil priznan položaj v zakonskih okvirih, ter s sposobnostmi priseljencev, ki so si izobrazbo pridobili na amerških univerzah.

Republikanska stran je pričakovano spodbijala trditve predsednika Obame, da mu je uspelo učinkoviteje zavarovati mejne prehode. Pred volitvami leta 2012 so mu zato očitali taktično izigravanje priseljske politike pri prepričevanju vedno številčnejšega latinsko-amerškega bazena volivcev. Z republikansko večino v Predstavniskem domu interesa za celovito prenovo zakonodaje in želenih sprememb predsednika Obame ni bilo. Predsednik Obama se je zato ob koncu svojega prvega mandata namesto na Kongres (kjer so se nekateri republikanci, ki so v preteklosti podpirali celovito prenovo sistema, svojo podporo umaknili) napotil k volivcem in se posvetil gradnji podpore reformi. »Prosim vas, da reformi oddate svoj glas podpore, Washington mora vedeti, da gibanje za reformo sistema obstaja in se krepí vse od vzhodne proti zahodni obali,« je še dejal v El Pasu (Obama v Foley 2013).

S tem je odgovoril latinsko-amerški skupnosti, kjer so menili, da predsednik nikoli ni izpolnil svojih obljub iz prve predsedniške kampanje, da bo s prenovo priseljske zakonodaje začel v prvem letu svojega predsedovanja. Ta strategija mu je omogočila, da je izpostavil republikansko stran kot odgovorno za onemogočanje prenove priseljske zakonodaje ter zaradi tega tudi pridobil zelene glasove volivcev iz te skupnosti.

S takšnim osebnim pristopom je v drugi predsedniški kampanji prispeval h gradnji gibanja za podporo reforme, hkrati pa je tudi pritiskal na republikance. Volivce je še pozval, naj mu pomagajo pri oblikovanju vladne spletne strani za podporo reformi priseljevanja, ker verjame, da lahko volja ljudstva spodbudi razpravo o priseljski zakonodaji in izostrí področja, o katerih bi se obe stranki lahko strinjali (The Huffington Post 2011).

Med svojo kampanjo je večkrat dejal, da bo reforma sistema priseljevanja cilj njegovega drugega predsedniškega mandata. Priznal je svojo napako, da v prvem mandatu ni držal obljube, a je obenem za to delno okrivil tudi oviranje republikanske strani.

V drugem predsedniškem mandatu se je stanje spremenilo. Republikanski predsedniški kandidat Mitt Romney je v svojem nagovoru na Floridi, pred volitvami junija 2012, nekoliko omilil svoje stališče glede priseljevanja ter spremenil retoriko, s katero je zmagal v boju za izbor republikanskega predsedniškega kandidata. Obljubil je, da bo v svojo politiko, če bo izvoljen, vključil nekatera področja za pomoč priseljencem in njihovim družinam, obenem pa je še vedno pozival ljudi, naj v državo ne vstopajo nezakonito.

Reforma sistema priseljevanja ni le moralni imperativ, temveč ekonomska nuja. Republikanci in demokrati zmoremo najti skupno pot, to dolgujemo samim sebi kot Američanom, in s tem zagotovimo, da bo naša država še vedno dežela priložnosti. Tako za tiste, ki so bili tu rojeni in za tiste, ki delijo naše vrednote in spoštujejo naše zakone. (Romney v Parker, Gabriel 2012)

Kljub temu je Mitt Romney leta 2012 volitve izgubil tudi zato, ker je prejel le okoli 27 odstotkov glasov latinsko-amerške skupnosti, kar je bil še manjši odstotek glasov, kot so jih republikanski predsedniški kandidati prejeli na volitvah v letih 2008, 2004 in 2000. Številni latinsko-amerški volivci so podpirali celovito reformo sistema priseljevanja in so jih zato mnenja republikancev odvrnila od glasovanja njim v korist. Prišlo je tudi do širše podpore državljanov za reformo sistema priseljevanja, saj so ankete pokazale, da kar dve tretjini Američanov verjame v reformo sistema in da bi priseljevanje moralo biti prednostna naloga med drugim mandatom predsednika Baracka Obame (Foley, Stein 2012).

Konec januarja 2013 je predsednik Obama v Las Vegasu nagovoril Američane ter poudaril potrebo po celoviti reformi sistema priseljevanja. Obljubil je, da bo predlog prenovljenega zakonodajnega predloga poslal v obravnavo v Kongres in vztrajal pri glasovanju, tudi če prizadevanja republikancev in demokratov ne bi obrodila sadov. »Danes sem tu zato, ker je prišel čas za razumsko in celovito reformo

sistema priseljevanja. Čas je zdaj,« (Obama v Foley 2013) je dejal, obkrožen z množico zagovornikov reforme in priseljencev. Nato je skupina osmih senatorjev – štirih demokratov in štirih republikancev – aprila 2013 predstavila zakonodajni predlog za reformo sistema priseljevanja. Kljub številnim podrobnostim, ki bi jih bilo treba doreči, so se strinjali o naslednjih področjih: o nujnosti vzpostavitve načina, kako naj nezakoniti priseljenci pridejo do državljanstva, o izboljšanju učinkovitosti sistema zakonitega priseljevanja, o večjem uresničevanju zakonodajnih predpisov v praksi ter povečani varnosti na mejah. Načrti in pričakovanja predsednika Obame glede reforme so se bolj ali manj ujemali z načrti skupine osmih, prioriteta vseh pa je bila zagotovitev pridobitve državljanstva nedokumentiranim priseljencem, ki trenutno živijo v ZDA. Predlog zakona o reformi sistema je bil z dopolnjenimi amandmaji 27. junija 2013, po manj kot enomesečni razpravi, z oseminšestdesetimi glasovi za in dvaintridesetimi glasovi proti v Senatu tudi potrjen in poslan v obravnavo Predstavniškemu domu Kongresa.<sup>3</sup> Predsednik Obama od potrditve predloga zakona v Senatu vztrajno poziva tudi Predstavniški dom, da podpre prenovo sistema priseljevanja ter da se loti reševanja celovito, z reformo in ne le s posameznimi zakoni, ki bi urejali le določena področja (Foley 2013).

Obama v svojem vztrajanju in v prizadevanjih za celovito prenovo sistema ni sam, saj se z njim strinja večina demokratov in precejšnje število republikancev. Zaradi retorike nekaterih republikancev, ki skušajo reformo povezati s predsednikovim imenom, pa sam procesa sprejemanja zakonodaje ne poskuša preveč vidno usmerjati, saj to daje priložnost nasprotnikom reforme, da z izgovorom o njegovi vpletenosti onemogočijo sprejetje zakonodaje (Newell 2013).

Vsekakor bo potrebnih še veliko kompromisov, truda in volje obeh strank, da bi na koncu reformo potrdili tudi v republikansko večinskem Predstavniškem domu Kongresa, ki pripravlja svojo različico predloga zakona in se nagiba k postopnemu sprejemanju predpisov, ki bi urejali posamezna področja (Foley 2013).

## RAZPRAVE V SENATU V 113. SKLICU KONGRESA PRED SPREJETJEM PREDLOGA PRISELJENSKEGA ZAKONA

Ameriški senatorji 113. sklica Kongresa so 7. junija 2013 začeli razpravljati o obširni prenovi sistema priseljevanja tujcev v ZDA. Za osnutek in predstavitev zakonodajnega predloga celovite prenove sistema priseljevanja je bila odgovorna skupina osmih senatorjev, štirih republikancev in štirih demokratov (senator Michael Bennet iz Kolorada, demokratski senator Richard J. Durbin iz Illinois, republikanski senator Jeff Flake iz Arizone, republikanska senatorka Lindsey Graham iz Južne Karoline, republikanski senator John McCain iz Arizone, demokratski senator Bob Menendez iz zvezne države New Jersey, republikanski senator Marco Rubio iz Floride in demokratski senator Chuck Schumer iz zvezne države New York. Skupina osmih senatorjev je spisala prvi osnutek zakonodajnega predloga in si prizadevala združiti republikanska in demokratska stališča na najbolj spornih področjih priseljevanja ter tako ustvariti pogoje za celovito prenovo sistema priseljevanja.

Voditelj demokratske večine v Senatu, senator Harry Reid, je v svojem uvodnem nagovoru pohvalil zakonski predlog in s tem odprl razpravo. »Naš sistem ne deluje in treba ga je popraviti,« je dejal senator Reid. »Razveseljivo je videti elan pri sprejemanju paketa reform, temelječega na razumu, ki bo pripomogel k večji varnosti naše države in pomagal enajstim milijonom nedokumentiranih priseljencev zaživeti po predpisih« (Reid 2013: 3997).

Medtem ko je Reid dejal, da pričakuje, da bo končno glasovanje o zakonodajnem predlogu pred 4. julijem 2013, je republikanski senator iz Alabame, Jeff Sessions, glavni nasprotnik zakona, poudaril,

3 U.S. Senate. 113th Congress, 1st Session. »Border Security, Economic Opportunity, and Immigration Modernization Act-Continued,« *Congressional Record* 159, No. 94, Pt. 12: str. 5357 (27. junij 2013).

da številni Američani nasprotujejo ideji podeljevanja državljanstva tistim, ki so v ZDA prišli nezakonito. »Prepovedano je najeti vodnika, nezakonito prestopiti mejo in nato čez osemnajst mesecev zahtevati ameriško državljanstvo,« je dejal Sessions. »To ni zakonito« (Sessions 2013: 4007). Avtorji predloga zakona so zatrjevali, da bi zakon predpisoval, da bi morali tisti, ki so v državi nezakonito, plačati globo, davke in nato še več let čakati na priložnost za državljanstvo, obenem pa bi na mejah poostriili nadzor nad vstopom v državo. Vendar pa so nasprotniki zakona kljub temu opozarjali na dejstvo, da bi predlog zakona dejansko pomenil pomilostitev nezakonito prisotnih posameznikov in bi tako še več posameznikov spodbudil, da bi skušali prečkati mejo v upanju za boljši jutri.

Floridski republikanski senator Marco Rubio, eden izmed članov skupine osmih, je poudaril tudi dejstvo, da ameriški sistem priseljevanja ni kos izzivom 21. stoletja ter da je pomembno za konkurenčnost ameriške družbe v svetovnem gospodarstvu vzpostaviti delujoč sistem priseljevanja. Opozoril je na zaposlene v tehnološkem sektorju ter športnike, košarkarje, katerih vprašljiv pravni položaj bi jih lahko prisilil, da bi morali oditi drugam (Rubio 2013: 4081). Demokratični senator iz Virginije, Tim Kaine, je v luči sprejetja predloga zakona zaprosil, da poda svoj govor v španskem jeziku, kar je za Senat zelo redko. Tako je celoten govor prebral v španskem jeziku, zapisnik senatnega govora pa vsebuje tudi angleški prevod (Kaine 2013: 4083).

Eden izmed najglasnejših nasprotnikov prenove sistema priseljevanja, republikanski senator Ted Cruz (ki je znan po tem, da nasprotuje vsemu, kar ima možnost potrditve v Senatu), je v televizijskem intervjuju za ABC News poudaril, da je predsednik Obama glavna ovira za celovito reformo priseljevanja: »Največja ovira za potrditev reforme priseljevanja, ki bi temeljila na razumu, je predsednik Barack Obama. Pot do državljanstva najbolj razdvaja sprejemanje tega zakona in Bela hiša vztraja na tem,« je dejal Cruz (Zeleny idr. 2013).

Razprava v Senatu je trajala vse do 27. junija 2013, ko je bil zakonodajni predlog z dodatnimi amandmaji z glasovanjem v Senatu tudi sprejet. Sprejetje predloga zakona v Senatu, ki bi reformiral priseljsko zakonodajo, je bil nedvomno plod prizadevanj skupine osmih demokratičnih in republikanskih senatorjev ter njihovega načrta združitve različnih mnenj v kompromisno celoto.

## **ANALIZA ZAKONODAJNEGA PREDLOGA IN SPREMEMB, SPREJETIH V SENATU V 113. SKLICU KONGRESA**

V Senatu sprejeti zakonodajni predlog obsega 1.198 strani in ureja številna širša področja: pot do državljanstva, poostriitev mejnega nadzora, izboljšanje pravic delavcev priseljencev in vzpostavitev sistema za delodajalce, zagotavljanje delovnih viz za konkurenčnost ameriškega gospodarstva ter socialno in sodno varstvo priseljencev.

### **Pot do državljanstva**

Predlog zakona omogoča pridobitev državljanstva številnim od okvirno enajstih milijonov posameznikov brez zakonitega statusa. Tistim, ki so v ZDA vstopili pred dopolnjenim šestnajstim letom, v ZDA končali srednjo šolo (ali opravili maturo) in končali vsaj dva letnika fakultete oz. štiri leta služili v vojski, bi bilo z reformo omogočeno pridobivanje državljanstva po zelo hitrem postopku. Po pridobitvi začasnega statusa, ki bi trajalo pet let, bi ti kandidati lahko zaprosili za zakonito stalno bivališče in hkrati tudi državljanstvo. Enako bi po hitrem postopku lahko za zakonito stalno bivališče zaprosili tudi kmetijski delavci. Reforma nadalje predvideva ukinitve vizumskih omejitev zakoncem in otrokom posameznikov z zakonitim stalnim prebivališčem zgolj na podlagi samovoljnega odločanja uradnikov. Omogoča, da bi določeni izgnani posamezniki zaprosili za oprostitev in bi se lahko vrnili v ZDA, predvideva pa tudi

delovne vizume za nekatere začasne delavce med obdobji pomanjkanja delovne sile in jim omogoča zaprositi tudi za zakonito stalno bivališče. Zakonci bi se lahko pridružili skrbniku družine in tako prejeli dovoljenje za delo. Dejansko reforma določene točke sicer še vedno slabo ureja. Pot do državljanstva bi tako za večino priseljencev trajala trinajst let; deset let registriranega začasnega statusa priseljenca in še tri leta statusa z zakonitim stalnim bivališčem. Poleg tega reforma vključuje stroge pogoje za pridobitev začasnega statusa, vključno s plačilom odmerjene zvezne davčne obveznosti, potrdilom o nekaznovanosti<sup>4</sup> ter pogojem prihoda v ZDA pred 31. decembrom 2011. Če bi prosilci za državljanstvo želeli ohraniti urejen oz. zakonit status, bi morali dokazovati, da bodisi ohranjajo redno zaposlitev (obdobje brezposelnosti ne bo smelo biti daljše od šestdeset dni), da imajo povprečni dohodek ali sredstva višja od zveznega praga revščine in da so vpisani v izobraževalne tečaje. Denarne globe vključujejo plačilo tisoč ameriških dolarjev pri vlogi za začasni status in tisoč ameriških dolarjev pri vlogi za zakonito stalno bivališče. Ob tem višina prijavnine še ni določena. Da bi sploh bili upravičeni do zakonitega stalnega bivališča, pa bi se morali prosilci vpisati v tečaj angleščine. Odpravila bi se tudi možnost državljanov ZDA, da bi poskrbeli za državljanstvo svojih odraslih poročenih otrok, starejših od enaintrideset let, ter bratov in sester (S.744 An Act 2013: 137–241).

## Dostop do socialnega varstva in sistema izobraževanja

Senatni predlog bi omogočal dostop do zveznega sistema, ki hkrati omogoča delo in študij, in do zveznih študentskih posojil mlajšim in začasnim priseljenkim delavcem, čeprav ti še vedno ne bi izpolnjevali pogojev za prejem »zvezne donacije Pell«<sup>5</sup>, dokler ne bi pridobili zakonitega stalnega bivališča. Omogočen bi bil tudi dostop do zvezne pomoči javnega stanovanjskega sklada za usposobljene priseljence, ki so žrtve družinskega nasilja. Na drugi strani bi bil priseljenecem z začasnim bivališčem onemogočen dostop do zveznih pomoči, vključno s storitvami »Medicaid«<sup>6</sup> in pomoči z boni za prehrano. Ti priseljenci še pet let po odobritvi zakonitega stalnega bivališča ne bi mogli dostopati do omenjenih zveznih storitev in do njih ne bi imeli pravice celih petnajst let. Priseljenci z začasnim bivališčem prav tako ne bi imeli pravice do subvencij za zdravstveno zavarovanje. Imetniki turističnih, poslovnih in študentskih viz pa bi bili prav tako izključeni iz programov, ki urejajo zdravstveno zavarovanje (S.744 An Act 2013: 343–514).

## Pravice delavcev

Zakonodajni predlog Senata bi na področju pravic delavcev zagotovil ustrezne postopke pri najemanju in s tem posledično zaščitil delavce, državljanke ZDA in zakonite priseljence, ki so bili oškodovani zaradi napake v sistemu elektronskega preverjanja upravičenosti zaposlitve.<sup>7</sup> Predvideva pa tudi kazni za delodajalce, ki bi skušali zlorabiti ta sistem upravičenosti zaposlitve. Uveljavile bi se pravice delavcev, saj bi bili neporavnana plačila in preostale morebitne neporavnane obveznosti krite ne glede na posameznikov priseljenki status. Razširile bi se tudi pravice za tiste delavce – priseljence, ki so doživeli grožnje maščevanja ali zlorabe na delovnem mestu. Imetnikom vizumov bi bilo omogočeno, da bi poiskali delo pri registriranih delodajalcih, poleg tistih, ki bi jih neposredno sponzorirali, tako da za ohranitev statusa priseljenca ne bi bili popolnoma odvisni samo od sponzorskega delodajalca. Vsi delodajalci bi morali,

4 Obstajala bo evidenca točno določenih kaznivih dejanj in prekrškov, ki jih prosilci ne bodo smeli zagrešiti.

5 »Federal Pell Grant« je donacija, ki se razlikuje od posojila v tem, da njeno vračilo ni nujno. Zvezna Pell donacija je običajno podeljena le dodiplomskim študentom, ki še niso diplomirali.

6 »Medicaid« je program za socialno in zdravstveno varstvo za družine in posameznike z nizkimi dohodki.

7 Gre za t. i. »Electronic Employment Verification System«, sistem, preko katerega delodajalci preverjajo upravičenost zaposlitve priseljenkih delavcev.

da bi preverjali upravičenost zaposlitve novih delavcev, uporabljati sistem elektronskega preverjanja upravičenosti zaposlitve delavcev EEVS. Ta sistem bi se uvajal postopno, glede na velikost delodajalca. To bi sicer lahko povzročilo, da bi državljani ZDA in do zaposlitve upravičeni priseljenci izgubili zaposlitev, saj ta sistem povzroča dodatne stroške delodajalcem in sili delavce v sivo ekonomijo. Elektronsko preverjanje upravičenosti zaposlitve delavcev pa obenem ne preprečuje zlorab delodajalcev pri izigravanju sistema in izkoriščanju delavcev. Uvedene bi bile nove, strožje kazni za dejanja, kot so zloraba številke socialnega zavarovanja ali potnega lista. Tisti, ki bi zagrešili tovrstne zlorabe zato, da bi prišli do dela, bi bili lahko izgnani iz države. Posamezniki, ki bi jim bil priznan začasni status bivališča, in tisti, ki bi prekoračili trajanje veljavnosti vizuma, brez dovoljenja za delo ne bi mogli zahtevati kritja za socialno varnost za katerokoli četrtletje med letoma 2004 in 2014 (S.744 An Act 2013: 514–571).

## Mejni nadzor

Senatni predlog vpeljuje uporabo sile in dodatno usposabljanje za ameriško mejno patroljo ter predpisuje preiskavo vseh mejnih incidentov z uporabo sile. Vključuje pritožbene postopke za kršitve državljskih in človekovih pravic. Zveznim organom kazenskega pregona in mejnemu osebju prepoveduje diskriminacijo na podlagi rase pripadnosti. Zahteva uvedbo zdravstvenih standardov za otroke v mejnem priporu in razširjeno usposabljanje mejnih agentov. Usposabljanje bi vodili zunanji strokovnjaki za državljske in človekove pravice, varstvo otrok in družinskega prava. Po mnenju Nacionalnega centra za priseljsko zakonodajo zakonodajni predlog kljub dobrim določbam namenja ogromno, nepotrebno vsoto denarja, šestinsitridaset milijard dolarjev za implementacijo sprememb za poostreitev mejnega nadzora, medtem ko se morajo druge zvezne agencije in storitve spopadati z zmanjševanjem proračunskih sredstev. Menijo še, da mejni ukrepi tudi militarizirajo mejo, škodujejo okolju in ogrožajo zdravje in varnost obmejnih prebivalcev ter da bi bil potreben najem najmanj devetnajst tisoč dvesto dodatnih mejnih agentov (kar je skoraj dvakratno trenutno število agentov), po nekaterih ocenah je to strošek v višini trideset milijard dolarjev.

Zasledovani cilj je ujeti devet od desetih priseljencev, ki bi skušali nezakonito vstopiti v državo ob južni meji. To pomeni tudi preko tisoč sto kilometrov dodatnih ograd vzdolž južne meje in zaradi tega povečano količino tehnoloških pripomočkov, letal in druge opreme, ki bi bila namenjena spremljanju celotne južne meje. Na južno mejo bi se napotilo celo nacionalno gardo. Mejni kontrolni organi bi na južni meji lahko izvedli preiskavo brez sodnega naloga v obsegu 100 milj od meje (na severni meji je preiskava brez sodnega naloga dovoljena le v obsegu 25 milj od meje) (S.744 An Act 2013: 73–137).

## Dostop do sodnega varstva

V senatnem predlogu je predvidena tudi vzpostavitev sistema, v katerem bi oseba, ki ji ne bi bil dodeljen status registriranega začasnega priseljence ali bi ji grozil preklic statusa, imela devetdeset dni časa, da se pritoži na odločitev. V času do razrešitve pritožbe pa osebi tudi ne bi grozila deportacija. Poleg tega bi bil omogočen tudi ponovni pregled poskusa zavrnitve ali preklica začasnega statusa na zveznem okrožnem sodišču. Omogočeno bi bilo pravno zastopstvo, pravica do zagovornika v postopkih izgona iz države, in sicer za otroke brez spremstva, za ljudi z duševnimi motnjami in druge ranljive osebe. Predvidena je tudi odprava enoletnega roka za vložitev prošnje za azil. Na drugi strani reforma ne upošteva državnih in lokalnih zakonov in pravilnikov, ki temeljijo na diskriminaciji na podlagi rase in videza, in ne odvrča od uzakonitve prihodnjih tovrstnih lokalnih zakonov. Kot »hujši zločin« priseljencev smatra tudi dejanja, ki vključujejo tri obsodbe vožnje pod vplivom alkohola, vključno s prekrški. Ljudje, ki bi zagrešili hujše zločine, pa bi bili skoraj samodejno izgnani iz države. Ne bi imeli nobene možnosti opustitve izgona iz države, prav tako ne bi imeli možnosti sebi v prid predstaviti pozitivne dejavnike,

kot so rehabilitacija, družinske vezi itd. Višje bi bile kazni za nezakonit vstop in nezakonit ponovni vstop v državo, niso pa spremenjena obstoječa pravila, ki prepovedujejo ponudnikom brezplačnih pravnih storitev (ki prejemajo zvezna sredstva), da bi pomagali priseljencem pri pridobivanju statusa začasnega bivališča (S.744 An Act 2013: 343–514).

Analizirani zakonodajni predlog je prestal obravnavo v Senatu, a je sedaj na vrsti še bolj nujna razprava v Predstavniskem domu Kongresa. Kongresniki so že obljubili, da bodo predstavili svoje načrte za reformo priseljavanja v ZDA in da jim bolj ustreza postopno sprejemanje posameznih zakonov, ki bi ločeno urejali področja. To pa vsekakor ni cilj niti predsednika Obame niti senatorjev, ki so s sprejetjem zakonodajnega predloga v Senatu že sedaj dosegli zgodovinsko priložnost celovite prenove sistema. Dejstvo je, da bodo nekakšne spremembe vsekakor potrebne in seveda bo Predstavniški dom spremembe tudi potrdil, vprašanje pa ostaja, v kolikšni meri bodo te odražale cilje predsednika Obame in Senata.

## PERSPEKTIVE SPREJEMANJA PRISELJENSKE ZAKONODAJE V PRIHODNOSTI

Čeprav je tematika priseljavanja v primerjavi z drugimi aktualnimi tematikami, kot so npr. ekonomija, delovna mesta, deficit, zdravstveno varstvo, za Američane manj pomembna, se večina kljub temu strinja, da je nova zakonodaja, ki bi uredila priseljavanje, nujna. In medtem ko se zdi, da senatni predlog priseljskega zakona čaka na svojo usodo v Predstavniskem domu Kongresa, Američani zelo podpirajo pglavitne cilje zakonodaje, vključno s potjo do državljanstva za nezakonite priseljence. To lahko govori v prid tudi dejstvu, zakaj je predlog zakona v Senatu prejel tako močno podporo te običajno polarizirane skupine senatorjev. Predlog namreč ne zahteva izbire med enim ali drugim vprašanjem, temveč se problematike loteva na celovit način – to dokazujejo stališča Senata in javnosti (Gallup Politics 2013). Če si bodo republikanci v Predstavniskem domu v prihodnje prizadevali za nasproten, postopen pristop k reševanju priseljske problematike, kjer različna področja urejajo posebni zakoni, se bodo zakonodajalci prisiljeni osredotočiti na eno reformo, skoraj zagotovo na račun druge. Tako bi tvegali preobrat javnega mnenja in zmanjšanje podpore pri prizadevanjih za reformo priseljavanja. Reforma namreč sedaj uživa široko podporo javnosti, postopni pristop urejanja problematike pa bi lahko vodil v ponovni dolgotrajni ideološki razkol in politični boj. Zato tudi ni verjetno, da Predstavniški dom ne bi sprejel prepotrebnih sprememb, a dokler predlog ni potrjen, je stanje na področju priseljavanja še vedno na isti točki. Zato si predsednik Obama prizadeva, da bi se problematika celovito reševala po hitrem postopku ter da bi prvič po letu 1986 ZDA z reformo uredile predolgo nedotaknjeno področje. »Čas je zdaj.« (Obama v Foley 2013)!

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## SUMMARY

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### DEBATES IN THE U.S. SENATE ON IMMIGRATION REFORM 2012–2013

Maja RAMOVŠ

The article provides an insight into United States' immigration system changes, from the times of Bill Clinton's presidency until the present, when the number of undocumented immigrants in the U.S. has surpassed eleven million and the need to regulate the immigration system is essential not only from an economic and safety but also from social point of view. In 2006, the Clinton administration succeeded in implementing the Illegal Immigration Reform and Immigrant Responsibility Act. Despite the fact that the reform introduced some very strict limitations and in particular, the possibility of the expulsion of undocumented immigrants, reality has shown that since 1996 more than a million undocumented immigrants have been expelled from the country. After the attacks on 9/11 the inflow of undocumented immigrants only grew, yet the possibilities of acquiring a US citizenship were practically slim to none (only if the US Congress had adopted a law on amnesty, similar to that of 1986). President Obama's approach to comprehensive immigration reform was more tactical as he had largely stayed out of the immigration give-and-take, to avoid associating the bill too much with him. He was, however, joined by an extremely carefully curated group of backers, ranging from the business community to labour, law enforcement, local politics, the activist community and also a significant number of Republicans. The Senate passed a filibuster hurdle on comprehensive immigration reform 27 June 2013. But the immigration reform bill still has to go through an entire other house of Congress. In any case, it will take a lot of compromises, effort and willingness of both parties to finally pass a reform bill also approved by the Republican majority in the House of Representatives. The major components of the bill are to devise a roadmap to citizenship, taking the necessary steps in the area of border and internal immigration enforcement (increased detention, deportation, and border control measures), ensuring that U.S. employers hire only workers eligible to be employed in the U.S., and setting up a streamlined process for highly skilled immigrants and immigrant family members to come to or remain in the U.S. Analysis of the implementation processes of new immigrant legislation in the presidential term of Barack Obama and an overview of the planned legislative changes that were made in the U.S. Senate also provide an understanding of spirit of the time in order to foresee what is to be expected in the field of immigration legislation once the debate is moved to the House of Representatives. It is of the utmost importance for United States to try and fix its broken immigration system and form a path to citizenship for eleven million undocumented workers.

K N J I Ž N E O C E N Ě

B O O K R E V I E W S



## **Javier P. Grossutti, *Via dall'Istria: L'emigrazione istriana dalla seconda metà dell'Ottocento ai primi anni Quaranta del Novecento.***

Università Popolare di Trieste, Unione Italiana – Fiume, Trieste, 2014, 271 str.

Predstave o izseljevanju iz Istre se navezujejo predvsem na t. i. eksodus italijanskega prebivalstva po drugi svetovni vojni. Ta asociacija ima zaradi političnega pomena takratnega dogajanja vidno mesto v italijanski in mednarodni historiografiji. Druga istrska selitvena gibanja so tako ostala v senci in bila deležna le manjšega števila obravnav. Sedaj se jim je pridružila prva monografska študija o izseljevanju iz Istre od srede 19. do štiridesetih let 20. stoletja, s katero je Javier Grossutti želel prispevati k zapolnitvi te vrzeli. Avtor je delo opravil natančno in s smislom za celoto, ki odlikuje njegove številne študije o furlanskem izseljevanju. Zgodovino istrskih selitvenih pojavov si prizadeva razbirati v njihovih globalnih in partikularnih razsežnostih ter brez nacionalnih ali drugih vnaprejšnjih opredeljevanj. Svoja dognanja opira na zavidljiv nabor gradiva, kar je v dobi rokohitrške hiperproduktivne historiografije že samo na sebi vredno pohvale. V razpravo je pritegnil razpoložljivo statistiko in vso pomembnejšo italijansko, hrvaško, slovensko in drugo literaturo. S tem ponuja panoramski pregled ter vrednotenje specifičnih vidikov istrskih migracijskih gibanj v dobi zrele modernizacije.

Za istrska selitvena gibanja so značilne raznolike oblike in usmeritve, ki izvirajo iz geografske umeščenosti in socialno-gospodarske fiziognomije polotoka. Povezane so s pomorsko tradicijo in z razvojem nekaterih notranjih gospodarskih težišč, v prvi vrsti Pule in Raše, kot tudi z gospodarskima in urbanima poloma Reko in Trstom, ki sta vsrkavala istrske migracijske tokove. Vzporedno s temi destinacijami so se iz Istre, ki je bila pretežno agrarna in v modernizacijskem razvoju dokaj zaostala, selitvena gibanja ves čas usmerjala proti drugim ciljem. Ti so bili od srede 19. stoletja zlasti Egipt, Turčija, Severna in Južna Amerika, med kontinentalnimi pa avstrijske in ogrske dežele. Sredozemski tokovi so bili povezani s prometnimi povezavami z vzhodnim Sredozemljem, gradnjo Sueškega prekopa, večanjem evropskih gospodarskih interesov in podjetniških elit v egiptovskih in turških mestih. Istrska prisotnost v Severni in Južni Ameriki je sprva prav tako nastajala v povezavi s pomorskim prometom, saj so se tam ustavljali pomorščaki, ki jih je zadržala zlata mrzlica ali priložnost udejstvovanja v pomorskih poklicih. Od osemdesetih let so se podajali tudi v Brazilijo in Argentino, v ZDA pa so mornarjem sledili delavci, ki so se zaposlovali v ladjarstvu, na rudniških in drugih industrijskih območjih. Prihajali so iz istrskih rudarskih in kmečkih območij, kot na primer iz Motovuna in celega poreškega okrajnega glavarstva ali s Kvarnerskih otokov, ki so beležili najvišjo stopnjo izseljevanja v Ameriko.

Sicer so se do prve svetovne vojne istrske selitve dogajale večinoma znotraj avstro-ogrske monarhije. Reka in predvsem Trst sta bila ves čas destinaciji za moške in še bolj za ženske, ki so se zaposlovale kot služkinje. Istrani v Trstu so izvirali večinoma iz severnega dela polotoka ter iz okrajnih glavarstev Volosko in Poreč. Slavonija, Bosna in razne avstrijske dežele so pritegnile agrarne, poklicne in splošne delavce, na primer na delovišča velikih javnih infrastruktur. Zelo živahne so bile tudi sezonske in ženske migracije, povezane z drobnim trgovanjem s sadjem, z zelenjavo, jajci, s kruhom in z drugimi pridelki na mestnih trgih.

Knjiga vsa ta gibanja obravnava s pomočjo statistike in drobne upravopolitične dokumentacije, ki je dragocena za razbiranje vzrokov, motivacij in dejavnikov ter pravnih, političnih in organizacijskih vidikov migracijskih gibanj. Posebno hvaležne so prošnje za pridobitev potnih listin, ki spregovorijo o socialnih in gospodarskih razmerah, razlogih za izselitve, individualnih in skupinskih selitvenih izbirah, odnosu oblasti do pojava in podobno. Med drugim pojasnjujejo, zakaj so krajevne oblasti s restriktivnim izdajanjem potnih dovoljenj omejevale svobodo izseljevanja, ki jo je zagotavljal ustavni zakon iz leta 1867. Izogniti so se namreč hotele stroškom za morebitne prisilne repatriacije ter socialne in zdravstvene potrebe izseljencev na tujem. Potne liste so zato izdajale samo, če so menile, da bodo prosilci v tujini gospodarsko uspešni. Zaradi take prakse so izseljenci odhajali ilegalno, izsiljevali so oblasti s prošnjami za socialne podpore, zastavljali so imetje, da bi si zagotovili sredstva za plačilo morebitnega povratka, puščali so pisne izjave, s katerimi so se odpovedovali socialnim obveznostim občine do njih ipd.

Iz dokumentacije o potnih dovoljenjih in skrbstvenih zadevah se kaže različnost trgov dela, v katere so se izseljenci vključevali. Nazorno je izseljevanje v Egipt, ki je bilo v nasprotju z goriškim pretežno žensko, spolno bolj uravnovešeno in je obsegalo razne poklicne delavce, obrtnike, med ženskami pa poleg služkinj tudi lepo število babic. Med izseljenci so bili nadalje javni uslužbenci, točneje policisti, ki so jih po letu 1882 najele angleške oblasti. Manjkalo ni niti kmetov, med specializiranimi poklici pa steklarskih delavcev, ki so jih v Turčijo pritegnili tržaški in puljski judovski podjetniki. Dokumentacija dopušča rekonstrukcijo migracijskih tipologij in strategij, kot so selitve po etapah, ki so Istrane vodile na primer v Trst, čez čas pa dalje v Egipt, Ameriko, Grčijo, Bosno ali drugam. Pokažejo se procesi stabilizacije in verižne migracije, zaradi katerih se je v Severni Ameriki v določenem momentu spremenila spolna struktura istrskih skupnosti.

Po prvi svetovni vojni so se nadaljevali mnogi trendi iz prejšnjega obdobja. Umeščali pa so se v nov italijanski državni in upravopolitični okvir ter v spremenjen mednarodni gospodarski in politični kontekst. V drugem delu knjige avtor ponudi panoramsko sliko migracijskega dogajanja in številne primere, s katerimi se lahko bralec vživi v čas, razmere in osebne izkušnje izseljencev med obema svetovnjima vojnoma. Opozarja pa tudi na potrebo po kompleksnem branju migracijskih gibanj v Istri in preostali Julijski krajini, ki jih ni mogoče tehtati samo v luči raznarodovalne politike in fašizacije. Pri vzrokih, usmeritvah in v dinamikah selitvenih tokov se kažejo vplivi mnogih drugih dejavnikov, in v samih politikah, ki jih je Italija vodila na t. i. »osvojenih ozemljih« (*terre redente*), je bilo vprašanje izseljevanja deležno artikuliranih in spremenljivih pristopov.

Pretežno agrarna in ubožoana Istra se je v tem obdobju morala spoprijeti s konkurenco drugih italijanskih dežel, neagrarno gospodarstvo pa je z zaprtjem puljskega arzenala močno skrčilo svojo zaposlovalno moč. Italijanske oblasti so zato takoj začele spodbujati izseljevanje in oblikovati predloge za usmerjanje izseljencev. Mnogi Istrani so se tako leta 1920 prijavili za delo v Romuniji, precej se jih je odzvalo načrtu za Brazilijo, obnovila se je praksa pomorščakov, ki so ostajali v ZDA, kot tudi pridruženje predvojnemu izseljencem v Ameriki. Največji del izseljevanja pa je bil v prvih povojnih letih usmerjen v evropske države, večinoma v Jugoslavijo, kar je bilo povezano s priključitvijo Julijske krajine k Italiji. To izseljevanje ni bilo samo delavsko in kmečko, umaknili so se tudi pripadniki srednjega sloja, ki so izgubljali službe, se spoprijemali s sovražnostjo novih oblasti in ki v novih razmerah niso videli življenjskih perspektiv. Temu izseljevanju, ki se je nadaljevalo vsa dvajseta in še trideseta leta, je botrovala mešanica gospodarskih, socialnih in političnih vzrokov.

Leta 1923 se je razživel tudi izseljevanje v Argentino, kamor so odhajali ladjarski delavci, zidarji, sodarji in drugi poklicni profili. Pravi val je nastopil v letih 1928–30, ko je tja odpotovalo kakih 4.500 Istranov, najprej moških, nato še žensk in otrok. Izseljenci iz prve polovice dvajsetih let so izvirali predvsem s puljskega območja, kjer je opešala industrija, iz druge polovice pa vse več s pazinskega območja in iz kmečkih vrst. V dvajsetih letih so izseljenske poti vodile tudi proti drugim ciljem, največ v Francijo, Belgijo in na Nizozemsko, nekaj tudi v Kanado, kjer pa so sprejemali samo pismene osebe, ki so posedovale določena denarna sredstva in železniško vozovnico do cilja zaposlitve.

Čeprav so italijanske oblasti do leta 1927 dopuščale odhajanje na tuje, so ga vendarle skušale uravnati. Spet se je to dogajalo s pomočjo prakse izdajanja potnih listov in presoje od primera do primera. Za kmete, ki so želeli v Jugoslavijo, so veljale restrikcije zaradi suma jugoslovanske propagande, enako tudi za dijake in študente, ker so se v jugoslovanskih šolah »utrjevali v jugoslovanstvu«. Zato se je razširilo ilegalno izseljevanje, ki mu je botroval tudi zapleten birokratski postopek za pridobitev potnih listin. Predložiti je bilo treba tudi zagotovila, da se bo družina brez izseljenega člana lahko preživljala. Ilegalne odhode so zatirali z globami družinam in odvzemom pravice do povratka.

Zaradi tega in zmanjšane receptivnosti Francije, Nizozemske in ZDA so se konec dvajsetih let tokovi preusmerili proti Argentini. Temu je od konca leta 1927 botrovala tudi nova italijanska demografska politika, ki je izseljevanje skoraj popolnoma ustavila. Julijska krajina je bila pri tem izjema, ker je bilo treba za krepitev »deslavizacije« olajšati odhajanje »drugorodcev«. Avtor trdi, da ni šlo za politiko izganjanja slovenskega prebivalstva, temveč za ukrepe, ki so Hrvatoma in Slovencem ob gospodarski krizi

preprosto odprli pot v tujino. Pomagali pa so še drugi dejavniki: ladjarske družbe s propagandno kampanijo in argentinska vlada, ki je v dogovoru z italijansko ponujala zaposlovanje pri javnih delih. Politika olajšav naj bi bila namenjena bolj Slovincem kot Hrvatom. Iz prošenj za potne liste je moralo vsekakor izhajati dvoje: volja prosilca za izselitev in njegovo »neitalijansko poreklo«, saj Italijanom odhod ni bil dovoljen. Ta predpis je povzročal upravnopolitičnim organom velike preglavice, saj je bilo dokazovanje »tujerodne« pripadnosti v protislovju s poitalijančenimi priimki, ki so bili znak »vračanja v italijanstvo«.

Po letu 1930 se je povečalo izseljevanje v evropske države, ki so ga oblasti zaradi krize spet dovolile. Odhajati so smeli samo brezposelni posamezniki, in to začasno, da ne bi prihajalo do demografske izgube. Tudi v tem primeru ni manjkalo dvoumnosti, saj je bilo izdajanje potnih listov dokaj prizanesljivo, izseljenci pa so za sabo poklicali družinske člane, kar naj bi bilo povezano s politiko »deslavizacije«. Z močnimi simbolnimi pobudami so si oblasti prizadevale vzdrževati vezi med izseljenci in domovino, na primer s potninami nosečnicam, ki so prišle roditi v Italijo in s tem »opravile plemenito fašistično dejanje«. Drug primer je javna pohvala, ki so je bili deležni v Franciji rojeni otroci, če so z 18. letom optirali za italijansko državljanstvo.

V tridesetih letih se je močno povečalo predvsem izseljevanje v druge italijanske dežele. Načrti za krepitev »deslavizacije«, ki so jih izdelali razni fašistični veljaki, so predvidevali tudi vzpodbujanje izseljevanja »Slavov« v italijanske kolonije v Afriki. Kljub temu so se v Cirenaiko in vzhodno italijansko Afriko napotili le maloštevilni Istrani, večina je odhajala v Trst. Pula in Raša sta občasno spet privlačila delavstvo z ruralnih območij. Leta 1940 je nastopil izseljenski val v Nemčijo, ki je zajel navadne in poklicne delavce in je bil sad italijansko-nemških dogovorov.

Avtor posveča precej prostora opisovanju življenja izseljencev na tujem. V Severni in Južni Ameriki so mnogi Istrani živeli v kolonijah, kar je bilo povezano s poklici oziroma z gospodarskimi dejavnostmi. V ZDA so številni delali v pomorstvu in rudarskih naselbinah, v Argentini pa jih je bilo največ v Buenos Airesu, točneje v okrajih La Plata in Berisso, kjer so mnogi delali v klavnicah, manjkalo pa ni niti kmetov, predvsem vinogradnikov. Italijansko in hrvaško govoreči izseljenci so ves čas gojili istrsko identiteto. Že pred vojno so ustanovili istrska podporna društva, ki so slonela na delavsko-poklicni solidarnosti in skrbela za socialne potrebe članov in njihovih družin. Taki sta bili tudi društvi Benevolent society Franina i Jurina – Hoboken in Sociedad istriana de ayuda mutua – Berisso, ki sta nastali po vojni. Čeprav so obstajala tudi hrvaška, italijanska in jugoslovanska društva, so se istrski Hrvati in Italijani večinoma družili v skupnih, istrskih organizacijah. Slovenci pa so se raje vključevali v slovenske, ki so bile tudi politično bolj aktivne. V Jugoslaviji je bila slika drugačna: hrvaški in slovenski izseljenci iz Istre so gojili jugoslovansko zavest in bili politično angažirani v izrazito protifašistično in protitalijansko usmerjenih emigrantskih organizacijah.

V sklepih avtor ponovno podčrta neustreznost nacionalnega pristopa pri opredeljevanju migracijskih procesov v Istri, prvič, ker je zaradi mešanih identitet težko razlikovati prebivalstvo po narodni pripadnosti, in drugič, ker je tudi v času raznarodovanja med obema svetovnima vojnoma izseljevanje potegnilo v svoj vrtinec tako slovensko in hrvaško kot tudi italijansko prebivalstvo. Problematično je ne nazadnje vprašanje dejavnikov in motivacij, ki so botrovali izseljevanju. Ti so bili po avtorjevem mnenju ves čas pretežno gospodarskega in socialnega značaja, čeprav je po prvi svetovni vojni vstopila z vso silo v igro tudi politika. Težko pa je ugotavljati težo gospodarskih in političnih dejavnikov, ker so se ti med seboj prepletali. Politično izseljevanje je potekalo ves čas in naj bi predstavljalo manjši delež vsega izseljevanja. S prepletenostjo socialnih, gospodarskih in političnih dejavnikov se je mogoče strinjati, prav zaradi tega pa je po naše bistveno vprašanje, kaj razumemo s pojmom politično izseljevanje in ali je, poleg nacionalnih, tudi dihotomična klasifikacija po kategorijah politično – nepolitično pravi ključ za razumevanje dogajanja. Če je kot politično izseljevanje mišljeno tisto, ki je bilo pogojeno s političnim in z nacionalnim preganjanjem, se nam zdi, na primer, obravnavati množično izseljevanje v Argentino konec dvajsetih let le kot gospodarski pojav, precej neustrezno. Motivacije izseljencev so bile nemara večinoma gospodarske, ni pa mogoče spregledati, da so za pojavom stale jasne politične namere italijanske države. Prav tako ni mogoče prezreti, da so izseljenci odhajali ne samo z mislijo

na perspektivnejše gospodarske razmere, ampak tudi v želji po manj zatiralskem življenjskem okolju. Strinjamo se potemtakem z avtorjem, da je razumevanje in nadaljnje osvetljevanje istrskega izseljevanja mogoče le s preseganjem stereotipnih pogledov ter na podlagi metodološko utemeljenih branj in kontekstualizacij dogajanja.

Aleksej Kalc



## Vera Kržišnik Bukič, Damir Josipovič (ur.), *Zgodovinski, politološki, pravni in kulturološki okvir za definicijo narodne manjšine v Republiki Sloveniji*

Inštitut za narodnostna vprašanja, Ljubljana, 2014, 206 str.

## Vera Kržišnik Bukič (ur.), *Kdo so narodne manjšine v Sloveniji*

Zveza zvez kulturnih društev narodov in narodnosti nekdanje SFRJ v Sloveniji, Ljubljana, 2014, 212 str.

V drugi polovici leta 2014 sta v Ljubljani izšli dve znanstveni monografiji na temo narodnih manjšin v Republiki Sloveniji, s poudarkom na vprašanju statusnopravnega položaja največjih v ustavi neimenovanih narodnih manjšin v tej državi. Knjigi sta, sodeč po nekaterih odzivih, užalili nacionalistične, »monokulturalistične« in še kakšne težnje tistega dela slovenske družbe, ki se počuti ogroženega ob skoraj vsakem poskusu uvedbe enakopravnosti nekoliko drugačnih.

Osrednja tema obeh knjig je namreč vprašanje, ali si slovenski Albanci, Bošnjaki, Črnogorci, Hrvati, Makedonci in Srbi (ABČHMS) zaslužijo status narodne manjšine ali ne. Publikaciji, katerih priprava je bila načrtovana in koordinirana na Inštitutu za narodnostna vprašanja v Ljubljani, nista le »hišni« raziskovalni rezultat, temveč sta plod medinstitucionalnega sodelovanja. In kar je danes že skoraj redkost: monografiji nista rezultat kakega raziskovalnega projekta,<sup>1</sup> temveč odraz potrebe po zapolnitvi dolgoletne strokovne in politične vrzeli, ki neposredno zadeva sorazmerno množičen segment slovenske populacije.

Prva knjiga z naslovom *Zgodovinski, politološki, pravni in kulturološki okvir za definicijo narodne manjšine v Republiki Sloveniji*, ki sta jo uredila dr. Vera Kržišnik Bukič in dr. Damir Josipovič, prinaša študije osmih avtorjev. Poleg obeh urednikov v njej s svojimi študijami sodelujejo štirje njuni kolegi z omenjenega inštituta: dr. Mitja Žagar, dr. Vera Klopčič, dr. Danijel Grafenauer in dr. Miran Komac, poleg njih pa še dr. Mirjam Milharčič Hladnik z Inštituta za slovensko izseljenstvo in migracije ZRC SAZU ter dr. Petra Roter s Fakultete za družbene vede Univerze v Ljubljani. Knjiga z različnimi pogledi avtorjev pomembno prispeva k poznavanju zgodovine iskanja mednarodnega konsenza pri pravnem definiranju narodne manjšine in k razumevanju tega, kako pomembno je oblikovanje ne le mednarodnopravno veljavne definicije tega pojma, temveč tudi specifične slovenske. Specifičnost vseh držav naslednic nekdanje SFRJ, če jih primerjamo z večino drugih držav, je v razpadu skupne federacije in pričakovanju recipročnosti med državami naslednicami pri reševanju manjšinskega vprašanja. Temu vidiku se v knjigi še zlasti posveča Damir Josipovič, ki jasno poziva k upoštevanju načela recipročnosti, saj imajo Slovenci v vseh drugih državah naslednicah nekdanje skupne države ustavni ali zakonski status manjšine ali vsaj ustavno/zakonsko opredeljeno možnost takšnega statusa, če ga želijo:

Kakorkoli obrnemo, se težko znebimo občutja, da je Slovenija med vsemi naslednicami jugoslovanske federacije naredila na področju manjšinske zaščite najmanj. Za oris lahko primerjamo ureditev na Hrvaškem in v Srbiji, kjer sta obe državi zelo široko pristopili k definiranju skupin prebivalstva, katerim naj bi se omogočila določena zaščita. Seveda se ta zaščita razteza od zaščite na celotnem območju, kjer živi, poleg posebne zaščite na specifičnih enotah lokalne samouprave, na primer občinah in županijah v hrvaškem primeru, in na občinah oziroma regijah v srbskem primeru. Zanimivo je, da ima tudi država Bosna in Hercegovina, ki je utrpela strašansko vojno in z njo neizbrisne posledice, inkluzivni tip definiranja manjšin, ki vključuje tudi Slovence. Enako velja tudi za Makedonijo; tam seveda so večji problemi zaradi silnih nasprotij med albansko in makedonsko govorečo stranjo. Treba je povedati, da so Slovenci priznani kot manjšina tudi v Črni gori, njena zakonodaja pa prav tako ne omenja kake

1 Vendar pa sta nadgradnja raziskave, ki so jo po naročilu Urada RS za narodnosti v začetku tisočletja izvedli Vera Kržišnik Bukič, Vera Klopčič in Miran Komac ter njene rezultate objavili v knjigi *Albanci, Bošnjaki, Črnogorci, Hrvati, Makedonci in Srbi v Republiki Sloveniji – ABČHMS v RS: Položaj in status pripadnikov narodov nekdanje Jugoslavije v Republiki Sloveniji*, Ljubljana: Inštitut za narodnostna vprašanja, 2003, [http://www.inv.si/DocDir/Publikacije-PDF/Raziskovalna%20porocila/Raziskava\\_Položaj\\_in\\_status\\_pripadnikov\\_narodov\\_nekdanje\\_Jugoslavije\\_v\\_RS.pdf](http://www.inv.si/DocDir/Publikacije-PDF/Raziskovalna%20porocila/Raziskava_Položaj_in_status_pripadnikov_narodov_nekdanje_Jugoslavije_v_RS.pdf) (11. 5. 2015).

avtohtonosti, še manj pa definicije. Imeli smo sicer primer, da so tudi na Hrvaškem najprej slovenska skupnost oziroma Slovenci bili omenjeni v ustavi, pa bili kasneje iz nje izbrisani zaradi političnih nasprotij in tenzij med Slovenijo in Hrvaško. Pred nekaj leti so se znova »vrnili« nazaj v ustavo, kljub temu da so bili in ostali ščiteni že na osnovi hrvaškega ustavnega zakona o pravicah manjšin. Popolnoma jasno je tudi, da nobena od jugoslovanskih naslednic razen Slovenije ni uveljavljala principa avtohtonosti v svoji pravni ureditvi. In seveda se tukaj postavlja vprašanje, zakaj Slovenija ni ravnala enako (str. 15–16).

Kot omenja Ribičič (str. 197), imajo Slovenci na Hrvaškem in v Srbiji zagotovljeno tudi zastopstvo v državnem parlamentu. Slovenija, ki rada poudarja načelo recipročnosti, kadar ji to ustreza, bo v vsakem primeru zadnja republika nekdanje Jugoslavije, ki bo drugim njenim narodom na svojem ozemlju priznala manjšinski status ali pravico do pridobitve manjšinskega statusa tistim skupnostim, ki ga želijo. Petra Roter v svojem prispevku sicer nekoliko pretirava, ko govori o zanikanju obstoja teh manjšin, na kar opozarja Komac, ko omenja Deklaracijo Republike Slovenije o položaju narodnih skupnosti pripadnikov narodov nekdanje SFRJ v Republiki Sloveniji (*Uradni list RS*, 7/2011) in njeno uresničevanje. Tudi vsebina Žagarjevega prispevka je zelo dobrodošla, predvsem za bralce, ki niso tako podrobno seznanjeni z mednarodnimi (zlasti pravnimi) definicijami narodne/etnične manjšine. Ta študija je pomembna tudi zaradi poziva k čim večji inkluzivnosti definicij etničnih (in drugih družbenih) manjšin.

Prispevek Vere Klopčič je še zlasti zanimiv zaradi tistih poudarkov, ki jih drugi sorodni prispevki v knjigi nimajo, npr. zaradi poudarjanja prepričanja, izraženega v preambuli Deklaracije OZN, o pravicah oseb, ki pripadajo narodnim ali etničnim, verskim ali jezikovnim manjšinam, »... da posepeševanje in zaščita pravic oseb, ki pripadajo narodnim ali etničnim, verskim ali jezikovnim manjšinam, prispevata k politični in socialni stabilnosti držav, v katerih živijo,« pa tudi »h krepitvi prijateljstva in sodelovanja med narodi in državami« (str. 57). To je namreč bistvo sekundarnega pomena zakonskega opredeljevanja individualnih in kolektivnih manjšinskih pravic, ki ga drugi avtorji te knjige nekoliko zapostavljajo. Prispevek Mirjam Milharčič Hladnik, ki se povsem odmika od statusnopravnega vidika raziskovalnega predmeta, obravnavanega v pretežnem delu monografije, ponuja poseben razmislek, saj osvetljuje vprašanje statusa manjšine iz drugačnega, kulturološkega zornega kota. Grafenauerjeva študija pa s celovito obravnavo ene od v Ustavi RS spregledanih (etničnih in jezikovnih) manjšin, namreč nemško govoreče etnične skupine, uspešno dopolnjuje knjigo.

Drugo knjigo, ki jo je urednica Vera Kržišnik Bukič nasloвила *Kdo so narodne manjšine v Sloveniji*, je izdala Zveza zvez kulturnih društev narodov in narodnosti nekdanje SFRJ v Sloveniji. Tokrat gre za zbornik prispevkov dveh skupin avtorjev. Prva skupina (dr. Ilija Dimitrijevski, dr. Šime Ivanjko, dr. Martin Berishaj, dr. Jasminka Dedić, dr. Biljana Žikić in dr. Dragutin Lalović) obravnava manjšinska vprašanja ABČHMS, ki živijo v Sloveniji, z vidika posamezne manjšine, medtem ko je druga skupina avtorjev (po leg urednice še dr. Miran Komac, mag. Dejan Valentincič in dr. Ciril Ribičič) prispevala širšo obravnavo osrednjega vprašanja zbornika, in sicer s teoretičnega, državnopravnega, mednarodnopravnega, primerjalnega in praktičnega vidika. V knjigi je za uvodno besedo urednice objavljen tudi nagovor Nilsa Muiznieksa, komisarja Sveta Evrope za človekove pravice, na okrogli mizi »Kdo so narodne manjšine v Republiki Sloveniji«, ki je potekala 14. 10. 2013 v ljubljanskem Cankarjevem domu, zaokrožata pa jo zaključni nagovor predsednika organizacijskega odbora te okrogle mize, Fariha Gutića, ter spis, ki ga je prispevala učenka ljubljanske osnovne šole Koseze, Besarta Xhelovci.

Čeprav poskušajo nekateri avtorji prve in druge knjige obravnavati ABČHMS v Sloveniji na enak način kot druge v ustavi neimenovane narodne manjšine, bo pazljiv bralec iz prispevkov vendarle izluščil vsaj dve bistveni razliki: 1) pripadniki drugih narodov nekdanje SFRJ v Sloveniji so šele z razpadom skupne države tako rekoč čez noč postali pripadniki narodnih manjšin, ki imajo matično državo v tujini; 2) ABČHMS v Sloveniji so poleg v ustavi imenovanih narodnih manjšin in nemško govoreče skupnosti daleč najboljše organizirani na področju ohranjanja manjšinske kulture in maternih jezikov. Za sedaj pa so od vseh ustavno nepriznanih manjšin tudi edini, ki jasno in kontinuirano izražajo interes za morebitno možnost manjšinske zastopanosti bodisi v lokalnem ali državnem političnem odločanju.

Leta 2003 so Albanci, Bošnjaki, Črnogorci, Hrvati, Makedonci in Srbi, ki živijo v Sloveniji, vložili javno pobudo za spremembo Ustave RS z namenom, da bi bile tudi njihove manjšine nominalno vpisane v besedilo ustave RS in priznane kot nacionalne manjšine. Njihova kulturna društva v Sloveniji so se namreč že leta 2003 povezala v Zvezo zvez kulturnih društev konstitutivnih narodov in narodnosti nekdanje SFRJ v Sloveniji. Prvi javni nastop v slovenskem okolju in hkrati pred predstavniki Evropske komisije za boj proti rasizmu in nestrpnosti (ECRI) so imeli v Ljubljani 14. oktobra 2003, ko so na okrogli mizi Evropske komisije med drugim tudi prebrali svoj osnovni skupni programski dokument z naslovom Javna pobuda. *Zveza zvez je nastala, da bi slovensko javnost in še zlasti ustrezne državne institucije opozorila na populacijo v Sloveniji, ki ji ni priznan kolektivni narodnostni status. Ob tem se počutijo diskriminirane do ustavno priznanih narodnosti Italijanov in Madžarov ter Romov, ki imajo ta status urejen.*

Predsednik Zveze zvez dr. Ilija Dimitrijeviški v drugi od tu predstavljenih knjig poudarja, da pripadniki nepriznanih manjšin ne morejo pristajati na status »prišlekov«, ker so v resnici produkt razpada skupne države. Priznanje statusa manjšine je po njegovem mnenju ključni pogoj za pripravo drugih zakonskih in podzakonskih aktov za uveljavljanje posebnih kolektivnih pravic pri ohranitvi jezikov, kulture, dostopa do javnih medijev, politične participacije in dostojanstva skupin državljanov RS, ki jih zastopa Zveza zvez. »Danes v Sloveniji deluje blizu sto kulturnih društev, ki programsko aktivno podpirajo ohranitev kulturne dediščine pripadnikov konstitutivnih narodov nekdanje skupne države,« piše Dimitrijeviški (str. 19).

Knjigi sta končno odprli najširšo javno diskusijo o tem vprašanju, kar je zasluga njenih avtorjev, obeh izdajateljev in obeh urednikov, zlasti dr. Vere Kržišnik Bukič, ki si že vsaj poldrugo desetletje osebno prizadeva za ureditev statusa slovenskih ABČHMS. Do javne diskusije na to temo je resda prišlo z nerazumno dolgo zamudo, ki pa postane razumljivejša, če upoštevamo dosedanji odpor predstavnikov slovenske nacionalne večine do reševanja tega vprašanja. Upam, da bosta knjigi s prepričljivimi argumenti, ki jih prinašata, ugledno avtorsko zasedbo in tudi podporo tako eminentnih osebnosti, kot je komisar Sveta Evrope za človekove pravice Nils Muižnieks, pospešila nadaljnje zakonske opredelitve in konkretne politične rešitve manjšinskega statusa predvsem ABČHMS v Sloveniji in nemške jezikovne manjšine, ob tem pa (vsaj na splošno, neimenovano) tudi novejših etničnih, jezikovnih in verskih manjšin, ki v Sloveniji že obstajajo in ki bodo slej ko prej dosegle tudi vitalnejšo notranjo povezanost in organiziranost.

Janja Žitnik Serafin

## Jasna Čapo, Caroline Hornstein Tomić, Katica Jurčević (ur.), *Didov san: Transgranična iskustva hrvatskih iseljenika*.

Institut za etnologiju i folkloristiku, Institut društvenih znanosti Ivo Pilar, Zagreb, 2014, 287 str.

Zbornik z naslovom *Didov san* s heterogenimi perspektivami na hrvaško izseljenstvo lahko beremo kot kolaž različnih stališč, ki šele kot celota smiselno zarišejo obod zgodbe. Sprehod skozi deset različnih – osebno pripovednih in analitičnih – prispevkov kot tudi literarnih drobcev se dotakne širokega spektra pogledov, stališč in izkušenj, ki uokvirjajo tako povratništvo kot tudi izseljenstvo. Po besedah urednic je cilj takšne zastavitve zbornika obiti avtoritativno in avtoritarno cenzuriranje pričevanj in enostransko ideološko pozicioniranje. Kljub samoumevnosti takšne znanstvene drže pa zbornik prav z odpiranjem prostora različnim glasovom, ki jim je dana avtonomna vloga, pomembno in ponovno opozarja na nujnost reflektiranja (ne) ideološke drže znanosti.

Sicer privlačen naslov zbornika *Didov san* [Dedove sanje] sproža v bralcu vrsto vprašanj, saj se članki v največji meri vrtijo okoli povratka potomcev hrvaških migrantov na Hrvaško: Gre res za dedove sanje?; So krožna gibanja potomcev res povratek? Ali so dedove sanje res tista povezovalna nit? ... V knjigi pravzaprav spremljamo gibanja, v ozadju katerih ležijo kulturno relevantne reprezentacije, ki odpirajo stara vprašanja o tem, zakaj ljudje migrirajo in se (ne) vračajo, in zapirajo krog z odgovori o množstvu ozadij, ki posameznike porinejo ali prepričajo v migrantsko izkušnjo. Med njimi so, po ugotovitvah avtoric, tudi dedove sanje. Bolj kot tehnično točen termin je naslov posrečena metafora, ki združuje čustveni naboj imaginarijev povratka in medgeneracijski pretok kulturno relevantnih reprezentacij, ki po skoraj stoletju izvirne migracije ponovno sprožijo gibanje; tokrat v povratni smeri in so, kot ugotavljajo avtorji, predvsem krožne narave.

Uvodni prispevek Jasne Čapo in Katicke Jurčević *Povratak kao dolazak* osvetli eno med osrednjimi ozadiji zbornika – reflektiranje koncepta povratka. Avtorici pri tem povratek postavita tako v relacijo z ambivalentnimi izkušnjami migrantov kot tudi z vprašanjem nedefinirane trajnosti povratka. Tekst Velimirja Piškorca obravnava migrantsko izkušnjo hrvaškega književnika in ljubiteljskega zbiralca materialne dediščine hrvaškega podeželja, Slavka Čambe. Prispevek je preplet Čambovih pesmi in komentarjev Velimirja Piškorca, ki se lahko bere tudi kot antologija Čambovih tekstov z migrantsko tematiko. Tekst Marina Sopte je na prvi pogled nenavadna izbira urednic znanstvenega zbornika, saj iz prve roke in v esejističnem slogu poda mišljenje hrvaškega migranta o prispevku kanadskih Hrvatov k ustvarjanju Republike Hrvaške. Čeprav lahko na prvi pogled rečemo, da je tekst ideološko obarvan, pa ideja avtonomnosti glasov, ki je v zborniku dana različnim piscem, pomembno osvetli namen urednic zbornika – predstavitev heterogenih izkušenj in stališč. Tekstu sledi pogovor z Marinom Sopto, ki ga je priredila Jasna Čapo, ena od urednic zbornika. Prispevek Caroline Hornstein Tomić z naslovom *Ovdje sam večno Švabica* temelji na narativnih intervjujih s potomci v Nemčiji rojenih izseljencev. Prispevek na nazoren način govori o spoju migracijske izkušnje in socializacije v transnacionalne prakse. Vračanja so tako razumljena kot projekt samorealizacije, ki ga spremljajo najrazličnejši osebni motivi. Tri naslednja poglavja avtoric/urednic pogovorov, Valentine Gulić Zrnić, Jasne Čapo in Katicke Jurčević, so osrednji del knjige in imajo obliko pogovorov in življenjskih zgodb hrvaških migrantov. Pogovori prinašajo različne osebne izkušnje dvostranskega povratka, (ne)zadovoljstva ob povratku in perpetualnega kroženja. Prispevek Marjete Rajković *Iveta* z naslovom *Čuo si da je Hrvatska kao raj* se osredotoča na izkušnje Hrvatov iz Argentine v Zagrebu, povratek pa s pomočjo izkušenj mlajših migrantov obravnava kot »odprto zgodbo«. Zadnje poglavje avtorice Jasne Čapo z naslovom *Cijeli svet je moj skupaj* s predhodnim člankom Marjete Rajković *Iveta* logično poveže zbornik s sedanostjo. Prinaša izkušnje mobilnih potomcev hrvaških izseljencev iz Avstralije, ki prihajajo na Hrvaško, ne toliko iz želje po ukoreninjenosti in domovini, temveč iz želje po spoznavanju novih svetov, potovanju in novih osebnih izkušnjah. Te lahko primerjamo s sabatičnim letom ali z delovnimi izkušnjami mladih v tujini, združenimi z motivi po novem in drugačnem. Ponovno odkrivanje dedovih sanj se tako umakne v ozadje in hkrati ostaja med pomembnimi začetnimi motivi povratnega/krožnega gibanja skozi transnacionalni prostor sodobnega sveta.

# NAVODILA AVTORJEM ZA PRIPRAVO PRISPEVKOV ZA DVE DOMOVINI / TWO HOMELANDS

## 1. Usmeritev revije

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

Prispevke, urejene po spodnjih navodilih, pošljite uredništvu v elektronski obliki na naslov [hladnik@zrc-sazu.si](mailto:hladnik@zrc-sazu.si). Članki so recenzirani. Avtorji naj poskrbijo za primerno jezikovno raven in slogovno dovršenost. Prispevki morajo biti oblikovani v skladu z *Navodili avtorjem za pripravo prispevkov za Dve domovini / Two Homelands*. Rokopisov, ki jih uredništvo revije *Dve domovini / Two Homelands* sprejme v objavo, avtorji ne smejo hkrati poslati drugi reviji. V skladu z Zakonom o avtorskih pravicah in 10. členom Poslovnika o delu uredništva revije *Dve domovini / Two Homelands* se avtorji z objavo v reviji *Dve domovini / Two Homelands* strinjajo z objavo prispevka tudi v elektronski obliki na svetovnem spletu.

## 2. Sestavine prispevkov

**Članki** morajo imeti sestavine, ki si sledijo po naslednjem vrstnem redu:

- glavni naslov članka (z velikimi tiskanimi črkami, okrepljeno);
- ime in priimek avtorja (priimku naj sledi opomba pod črto, v kateri so navedeni: 1. avtorjeva izobrazba in naziv (na primer: dr. zgodovine, znanstveni sodelavec); 2. ime in naslov avtorjeve institucije (na primer Inštitut za slovensko izseljenstvo in migracije ZRC SAZU, Novi trg 2, SI-1000 Ljubljana); 3. avtorjev elektronski naslov);
- predlog vrste prispevka (izvirni, pregledni ali kratki znanstveni članek/prispevek, strokovni članek);
- izvleček (slovenski naslov članka in slovenski izvleček, skupaj s presledki do 1000 znakov);
- ključne besede (do 5 besed);
- abstract (angleški prevod naslova članka in slovenskega izvlečka);
- key words (angleški prevod ključnih besed);
- članek (1. skupaj s presledki naj ne presega 45.000 znakov; 2. celotno besedilo naj bo označeno z »Normal« – torej brez oblikovanja, določanja slogov in drugega; 3. pisava Times New Roman, velikost 12, obojestransko poravnava, presledek 1,5; 4. odstavki naj bodo brez vmesnih vrstic; prazna vrstica naj bo pred in za vsakim naslovom in predvidenim mestom za tabelo ali sliko; 5. odstavki so brez zamikov; 6. naslove označite ročno, podnaslove prvega reda z velikimi tiskanimi črkami in okrepljeno, podnaslove drugega reda z malimi tiskanimi črkami in okrepljeno; 7. (pod) poglavij ne številčimo);
- summary (angleški povzetek članka, največ 3000 znakov s presledki).

V besedilih se izogibajte podčrtovanju besed, okrepljenemu in poševnemu tisku; s poševnim tiskom označite le navedene naslove knjig in časopisov. V slovenskih prispevkih uporabljajte naslednje okrajšave in narekovaje: prav tam, idr., ur., »abc«; v angleških: ibid., et al., ed./eds., "migration". Izpust znotraj citata označite z oglatim oklepajem [...].

**Poročila in ocene** morajo imeti sestavine, ki si sledijo po naslednjem vrstnem redu:

- poročila s konferenc in drugih dogodkov, razmišljanja: naslov dogodka, datum poteka, ime in priimek avtorja, besedilo naj obsega med 5.000 in 15.000 znaki skupaj s presledki;
- knjižne ocene: ime in priimek avtorja ali urednika knjige, ki je predmet ocene, naslov knjige, založba, kraj, leto izida, število strani, besedilo naj obsega med 5.000 in 15.000 znaki skupaj s presledki, na koncu sledita ime in priimek avtorja ocene.

### 3. Citiranje

Avtorji naj pri citiranju med besedilom upoštevajo naslednja navodila:

- Citati, dolgi pet ali več vrstic, morajo biti ročno oblikovani v ločenih enotah, zamaknjeni, brez narekovajev.
- Citati, krajši od petih vrstic, naj bodo med drugim besedilom v narekovajih in pokončno (ne poševno).
- Navajanje avtorja v oklepaju: (Anderson 2003: 91–99); več navedb naj bo ločenih s podpičjem in razvrščenih po letnicah (Milharcič Hladnik 2009: 15; Vah Jevšnik, Lukšič Hacin 2011: 251–253).
- Seznam literature in virov je na koncu besedila; v seznamu literature na koncu se navajajo samo navedbe literature iz besedila; enote naj bodo razvrščene po abecednem redu priimkov avtorjev, enote istega avtorja pa razvrščene po letnicah; če imamo več del istega avtorja, ki so izšla istega leta, jih ločimo z malimi črkami (Anderson 2003a; 2003b).
  - a) Knjiga:
 

Anderson, Benedict (2003). *Zamišljene skupnosti: O izvoru in širjenju nacionalizma*. Ljubljana: Studia Humanitatis.
  - b) Članek v zborniku:
 

Milharcič Hladnik, Mirjam (2009). Naša varuška. *Krila migracij: Po meri življenjskih zgodb* (ur. Mirjam Milharcič Hladnik, Jernej Mlekuž). Ljubljana: Založba ZRC, ZRC SAZU, 15–20.
  - c) Članek v reviji:
 

Vah Jevšnik, Mojca, Lukšič Hacin, Marina (2001). Theorising Immigrant/Ethnic Entrepreneurship in the Context of Welfare States. *Migracijske i etničke teme* 27/2, 249–261.
  - d) Spletna stran:
    - Becker, Howard (2003). *New directions in the Sociology of Art*, <http://home.earthlink.net/~hsbecker/newdirections.htm> (1. 2. 2008).
    - *Interaction: Some ideas*, <http://home.earthlink.net/interaction.htm> (1. 2. 2008).

### 4. Grafične in slikovne priloge

- Fotografije, slike zemljevidi idr. – z izjemo tabel, narejenih v urejevalniku Word, ki pa morajo biti oblikovane za stran velikosti 16,5 x 23,5 cm – naj ne bodo vključeni v Wordov dokument. Vse slikovno gradivo oddajte oštevilčeno v posebni mapi z vašim priimkom in imenom. Opombe v podnapisih ali tabelah morajo biti ločene od tekočega teksta. Fotografije naj bodo v formatu jpg.
- Lokacijo slikovnega gradiva v tekstu označite na naslednji način:
 

Fotografija 1: Kuharica Liza v New Yorku leta 1905 (avtor: Janez Novak, vir: Arhiv Slovenije, 1415, 313/14) ali Preglednica 1: Število prebivalcev Ljubljane po popisu leta 2002 (vir: Statistični urad RS, Statistične informacije, 14).
- Za grafične in slikovne priloge, za katere nimate avtorskih pravic, morate dobiti dovoljenje za objavo.

# INSTRUCTIONS TO AUTHORS PREPARING ARTICLES FOR PUBLICATION IN *DVE DOMOVINI / TWO HOMELANDS*

## 1. Editorial content

*Dve domovini / Two Homelands* welcomes the submission of scientific and professional articles, reports, discussions and book reviews from the humanities and social sciences focusing on migration and related phenomena. The journal, published since 1990, is multidisciplinary and multilingual. Two volumes are published per year in print and electronic form on the internet (<http://twohomelands.zrc-sazu.si/>).

Articles should be prepared according to the instructions stated below and sent in electronic form to the editorial board at the following address: [hladnik@zrc-sazu.si](mailto:hladnik@zrc-sazu.si). All articles undergo a review procedure. Manuscripts that are accepted for publishing by the editorial board should not be sent for consideration and publishing to any other journal. Authors are responsible for language and style proficiency. Authors agree that articles published in *Dve domovini / Two Homelands* may also be published in electronic form on the internet.

## 2. Elements

**Articles** should contain the following elements in the order given:

- Title (in capital letters, bold);
- Name and surname of the author (after the surname a footnote should be inserted stating the author's: 1. education and title (e.g. PhD, MA in History, Research Fellow etc.); 2. full postal address (e. g. Slovenian Migration Institute, Novi Trg 2, SI-1000 Ljubljana); 3. e-mail address;
- Type of contribution (original, review or short scientific article; professional article);
- Abstract (title of the article and abstract, up to 1000 characters with spaces);
- Key words (up to 5 words);
- Article (1. should not exceed 45,000 characters with spaces; 2. the style of the entire text should be "Normal"; 3. font: Times New Roman 12; 4. paragraphs should not be separated by an empty line, empty lines should be used before and after every title and space intended for a chart or figure; 5 paragraphs following titles should not be indented, bullets and numbering of lines and paragraphs should be done manually; 6. titles should be marked manually, Heading 1 with bold capital letters, Heading 2 with bold lower-case letters; 7. (sub)sections of articles (Heading 1 and Heading 2) should not be numbered);
- Povzetek (summary in Slovenian language, 3000 characters with spaces).

Avoid underlining and using bold in all texts. Italics should be used when emphasising a word or a phrase. Italics should also be used when citing titles of books and newspapers. In articles in English, the following abbreviations should be used: *ibid.*, *et al.*, *ed./eds*. When using inverted commas/quotation marks, use double quotation marks; single quotation marks should be used only when embedding quotations or concepts within quotations. Omitted parts of quotations should be indicated by square brackets with ellipsis [...].

**Reports and reviews** should contain the following elements in the order given:

- Reports from conferences and other events, discussions: title of the event, date of the event, name and surname of the author, 5,000 to 15,000 characters with spaces;
- Book reviews: name and surname of the author or editor of the book, title of the book, name of publisher, place of publication, date of publication, number of pages, 5,000 to 15,000 characters with spaces, with the name and surname of the reviewer at the end.

### 3. Quotations in articles

- Long quotations (five lines or more) should be typed as an indented paragraph (using the “tab” key), without quotation marks, the first line of the paragraph after the quotation should not be indented; quotations shorter than five lines should be included in the main text and separated with quotation marks, in normal font (not italic).
- When citing an author in brackets use the following form: (Anderson 2003: 91–99); when citing several authors separate their names with a semicolon and cite them according to the year of publication in ascending order (Milharčič Hladnik 2009: 15; Vah Jevšnik, Lukšič Hacin 2011: 251–53).
- A list of references should be placed at the end of the text and arranged in alphabetical order according to the author’s surname. The list of references should include only cited sources and literature. Multiple references by one author should be arranged according to the year of publication. Multiple references by one author published in the same year should be separated with lower-case letters (e.g. Ford 1999a; 1999b).
  - a) Books:  
Anderson, Benedict (1995). *Imagined Communities: Reflections on the Origin and Spread of Nationalism*. London, New York: Verso.
  - b) Articles in a series:  
Milharčič Hladnik, Mirjam (2009). Naša varuška. *Krila migracij: Po meri življenjskih zgodb* (ed. Mirjam Milharčič Hladnik, Jernej Mlekuž). Ljubljana: Založba ZRC, ZRC SAZU, 15–20.
  - c) Articles in journals:  
Vah Jevšnik, Mojca, Lukšič Hacin, Marina (2001). Theorising Immigrant/Ethnic Entrepreneurship in the Context of Welfare States. *Migracijske i etničke teme* 27/2, 249–261.
  - d) Internet sources:
    - Becker, Howard (2003). *New Directions in the Sociology of Art*, <http://home.earthlink.net/~hsbecker/newdirections.htm> (1 Feb. 2008).
    - *Interaction: Some Ideas*, <http://home.earthlink.net/interaction.htm> (1 Feb. 2008).

### 4. Graphics and illustrations

- Photographs, illustrations, maps etc. – with the exception of charts produced in Microsoft Word, which have to be adjusted to page size 16.5 x 23.5cm (6.5” x 9.25”) – should not be included in the Word document. All illustrative material needs to be numbered and submitted separately in separate folder with the author’s name and surname. Please submit visual material in .jpeg form.
- Locations of figures in the text should be marked as follows:  
Figure 1: Lisa Cook in New York in 1905 (Photo: Janez Novak, source: Archives of Slovenia, 1415, 313/14) or Chart 1: Population of Ljubljana after the 2002 Census (source: Statistical Office of the Republic of Slovenia, Statistics, p. 14)).
- Permission to publish must be obtained for uncopyrighted graphic and illustrative material.



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