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OLD AGE POVERTY: THE GENDER DIFFERENCES IN LIFELONG DEPRIVATIONS

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ABSTRACT

This article examines gender differences in old-age poverty in Slovenia through a life course perspective. Using qualitative in-depth interviews with 33 individuals aged 65 and older, the article identifies gender specific patterns of deprivation. Findings reveal that both men and women experience fragmented work histories and engagement in the grey economy, but women face additional disadvantages due to lower education levels, caregiving responsibilities, and persistent gender pay gaps. The insight into the interplay between structural inequalities and individual trajectories in shaping old-age poverty contributes to an understanding of the ways in which gender specific disadvantages accumulate over time.

Keywords: old-age poverty, gender differences, life course perspective, structural inequalities, socialism

POVERTÀ IN ETÀ AVANZATA: LE DIFFERENZE DI GENERE NELLE PRIVAZIONI NEL CORSO DELLA VITA

SINTESI

Questo articolo esamina le differenze di genere nella povertà degli anziani in Slovenia attraverso la prospettiva del corso di vita. Utilizzando interviste qualitative approfondite con 33 persone over 65, l'articolo identifica modelli di privazione specifici per genere. I risultati rivelano che sia gli uomini che le donne sperimentano storie lavorative frammentate e impieghi nell'economia sommersa, ma le donne affrontano ulteriori svantaggi a causa dei livelli di istruzione più bassi, delle responsabilità di cura e del persistente divario retributivo di genere. La comprensione dell'interazione tra disuguaglianze strutturali e traiettorie individuali nella formazione della povertà in età avanzata contribuisce alla comprensione dei modi in cui gli svantaggi specifici di genere si accumulano nel tempo.

Parole chiave: povertà in età avanzata, differenze di genere, prospettiva del corso di vita, disuguaglianze strutturali, socialismo

INTRODUCTION¹

Slovenia is one of the EU member states where population ageing is occurring at an above-average rate (Gerdina & Kurdija, 2024). As populations in the EU continue to age, the issue of old-age poverty remains a pressing concern. Although the increased overall education and pension system implementation have contributed to a decrease in old-age poverty over last decades (Oris et al., 2017), the Eurostat data shows that in recent years old-age poverty is increasing. In the EU 27, 18.9% of older women aged 65+ live in poverty, compared to 13.9% of men. In the 75+ age group, the gap is even wider, with 20.7% of women at risk of poverty compared to 14.1% of men (Eurostat, 2024). Furthermore, the data suggests that older individuals – particularly those who have faced lifelong economic disadvantages – are disproportionately affected by poverty in later life.

This disparity is primarily the result of structural inequalities that accumulate over the life course (Ferraro, 2018). Over time, unequal access to and distribution of resources manifest in various forms of deprivation, limiting access to education, stable employment, and financial security (Tillmann & Voorpostel, 2012). Women are more likely to experience economic disadvantages throughout their lives due to lower wages, interrupted careers, and caregiving responsibilities (Torres, 2014). Therefore, examining how early-life disadvantages compound over time, is crucial for understanding old-age poverty (Gabriel et al., 2015). The literature investigating old-age poverty of men and women through a life course perspective is, however, limited (for notable exceptions cf. Gabriel et al., 2015; Oris et al., 2017).

To address this gap the article aims to examine the gender differences in old-age poverty, explore the differences in specific cultural and political contexts and thus to contribute to the understanding of the multidimensional and complex process of the accumulation of disadvantages throughout the life course of older men and women living in poverty. To this end, the article addresses the following research question: What patterns of deprivation emerge across different life stages that lead to old-age poverty, and how do these patterns differ by gender?

RESEARCH REVIEW ON POVERTY AND GENDER

Individuals are in many ways embedded in and dependent on systemic conditions and institutional frameworks (Rener, 2010) as well as social norms, the perceptions and attitudes of the wider and immediate social environment towards social inequality, diversity,

difference or marginalization. All of this affects people's social status, livelihood, self-image, position and consequently their agency and their capabilities (Sen, 2002). Understanding these processes is crucial for the development of appropriate support and assistance services, as they are interrelated and depend on the social and cultural environment, the political and structural framework of society, e.g. the welfare state and social policy (Daly, 2000), as well as people's actions and choices. Recent publications add to that the importance of the life course perspective to emphasise the changes that happen over the time in both structural framework and life histories (Daly et al., 2023). In Slovenia, older women are particularly at risk of poverty.

Considering household type the extent of poverty is particularly high for men and women living alone and for tenants. Only in two groups are the poverty rates of women slightly lower than those of men, e.g. single person households and those aged 75+ but this is only a statistical estimate.

The results of the study on the interaction of social policy and life courses by Börsch-Supan et al. (2011) show that inequalities in old age build up despite (or because of) social policies and other related measures. Certain policy measures have direct effects. For example, the eligibility requirements for old-age or disability pensions and certain characteristics of the labour market have a direct impact on early retirement. On the other hand, long-term measures in the areas of education, health and housing have indirect and inter-related effects (Börsch-Supan et al., 2011). Schaffner Goldberg (2010) notes that by researching personal biographies, a complex link can be identified between the individual's life course and the historical context that the welfare state represents.

The existing literature outlines several life course events as contributors to old age poverty. Early life educational attainment is linked to later economic disadvantage (Carlsson et al., 2023). Gender differences appear often: women face higher risks when caregiving responsibilities disrupt their careers (DeRigne et al., 2022). Family formation events such as marriage or divorce further influence later life poverty (Fonseca et al., 2014), as older women who live alone (Ahonen & Kuivalainen, 2024; Leskošek, 2019) or support dependent family members are more vulnerable to old-age poverty. In addition, health events and cumulative midlife health disadvantages, consistently emerge as predictors of poorer economic outcomes in old age (Kemptner, 2019). The impact of these life events also varies with their timing. For instance, Riekhoff et al. (2025) report that the impact of financial hardship

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Table 1: At-risk-of-poverty rate by age groups, gender, household type and employment status, 2024 (Source: SURS, Income, poverty and social exclusion; Eurostat, 2024).

	Age	Gender	%
By Age Groups	Total	Men	12.1
		Women	14.3
	65+	Men	18.4
		Women	25.8
	75+	Men	13.4
		Women	29.7
By Household Type	One person 65+	Men	48.2
		Women	47.8
	Two adults, at list one adult 65+		14.2
By accommodation tenure status	65+ Owner or rent free	Men	17.0
		Women	24.7
	65+ Tenant	Men	50.7
		Women	54.4
	75+ Owner or rent free	Men	11.8
		Women	28.4
	75+ Tenant	Men	67.0M ²
		Women	65.4M

varies depending on when it occurs in the life course. Finally, Daly (2000) argues that the welfare state can play an important role in regulating social inequalities and gender inequalities in particular; it can mitigate or exacerbate them depending on how it regulates or determines the relationship between the state and the family or the individual throughout the life course.

The majority of poverty research relates to the incidence and extent of poverty, statistical measures, international comparisons, income distribution and inequality (Banerjee & Duflo, 2011; Milanović, 2016). These studies have made an important contribution to understanding the mechanisms and role of the structural environment in the emergence and maintenance of poverty and social inequality. However, they provide only a limited understanding of how poverty is reproduced and how it affects different generations and groups, how people experience it, what strategies they use to cope with poverty, how poverty hinders access to education, health care or the labour market, and how it is passed on across generations. Therefore,

we situate our study within the life course conceptual framework (Elder & Giele, 2009), the lifeworld (Ule, 2018) and everyday life in poverty (Dewilde, 2003; Rank et al., 2015; Švab, 2018). This research focuses on the multidimensionality of poverty and how it accumulates over the life course, what are the main trajectories for poverty in old age (Gabriel et al., 2015; Oris et al., 2017). By employing a life course approach to poverty this article sets out to show how individuals' biographies are intertwined with the structural environment (Börsch-Supan, 2011; de Graaf & Maier, 2015) and contribute to a deeper understanding of gender differences in poverty (Schaffner Goldberg, 2010).

METHODOLOGY

The study used a qualitative methodology to explore everyday life, the lifeworld, life stories and the life course, which allows the data to be compared with other international studies (Dewilde, 2003; Schaffner Goldberg, 2010; Rank et al., 2015; Švab, 2018). The concept

2 M means that the estimate is considered less reliable.

Table 2: Sample characteristics.

Age	65–95 years, average 75.4
Gender	13 men, 20 women
Nationality at birth	Slovenian (21), Bosnian (5), Croatian (4), Serbian (2), Polish (1)
Regions	Central Slovenia (6), Coastal Karst (12), Littoral-Inner Carniola (5), Upper Carniola (2), Savinja (2), Mura (2), Drava (2), Central Sava (2)
Level of urbanisation	Densely populated areas (cities, larger urban centres) (6); intermediate density areas (smaller cities, suburban areas, smaller urban centres) (16); thinly-populated areas (rural areas) (11)
Educational attainment	Unfinished elementary school (6), Elementary school (18), Vocational school (6), Secondary school (1), University degree (2)
Marital status	Single (6), Married (8), Divorced (9), Widow-er (10)
Household type	One person (23), Two persons (8), Three persons (2)

of everyday life refers to people's actions, discursive and cognitive practices, while the lifeworld is the domain of life in which these actions and practices take place (Ule, 2018). The life course enables the study of the change, impact and interconnectedness of everyday life and the social context in which it takes place over extended periods of time. We choose narrative biographical semi-structured interviews as a methodological tool for our project. Biographical narrative interviews are commonly used in the life course studies, along with other ethnographical research tools such as the analysis of visual material, participant observation, discourse analysis, etc. (Elder & Giele, 2009; Vezovnik, 2018).

Interviews were conducted in the period from November 2023 to April 2024. The sample consisted of a geographical spread (from Pomurje to the Obalno-Kraška region), gender (13 men and 20 women, no other gender identity), income (below the poverty line), age (65+) and urban-rural area. Since the population is difficult to access, we chose different sampling methods. Most of the contacts came from the Centres for Social Work (Slovenian social services), some from the Red Cross and other organisations. We explained to the organisations the purpose of the interviews and the characteristics of the sample, and they sent us the contact details of those who agreed to be interviewed. We contacted them and it turned out that some were not willing to be interviewed, some were ill, others had left their homes to go to older people's homes or hospitals. In the end we were able to conduct 33 interviews. We conducted six interviews twice. The individual visits lasted longer than the interviews themselves, because the interviewees were happy to receive a visit and wanted to talk to us, show us their homes, tell us about their neighbourhoods and so on. Some of the visits lasted more than 3 hours.

Most of the older people were very open and talkative and wanted to share their life stories. Some could not remember distant events or did not want to talk about certain topics.

The interviews were transcribed and anonymized and given a code consisting of the researcher's abbreviations and the number of the interview conducted. We removed any data that could reveal identity (first names, last names, city, addresses, year, relatives and other personal data).³ The anonymized interviews were then qualitatively processed and coded using the MAXQDA programme. We created a coding book with the main themes that related to the areas and time periods we asked about and identified subthemes in it that followed the course of the interview. The study was reviewed and approved by the Commission for Research Ethics at the Faculty of Social Work, University of Ljubljana.

RESULTS

The presentation of the results is organised according to the most important life-course trajectories, such as growing up in a primary family, education, working career, partnership, taking on caring responsibilities and life after retirement, health, housing, violence and income.

Women's trajectories

Growing up and primary family

The vast majority of women interviewed came from poor families or from farms with little land and few animals. Their parents had no education and were mainly farmers. In a few families, only the father was employed,

³ The empirical data supporting this study are securely stored by the project team and are available from the corresponding author upon reasonable request.

but mothers had some income from informal work, such as growing and selling flowers, cross-border housework, selling handicrafts, sewing and so on.

Most described their parents in positive terms and were sympathetic to their difficult situation. Some of them reported violence:

My dad was a heavy drinker. And many times, my mother would take the three of us and go. It was really like that from childhood. So, I'll tell you: it wasn't that... high level of violence, but... a lot of times when he was drunk, we would run away. We went to my mother's place where I was born. (Neva, F, 72)

Education and early career

Almost all of them started to work early, either to take care of the household, to look after the other children, to work on the farm, or they left school early to find a job and help their parents support the family with their wages.

More than half had low education, i.e. incomplete or finished elementary school. Only four of the interviewees had completed vocational school or secondary school.

Working trajectories

The employment careers varied greatly. Three interviewees had never been employed and worked on a farm. Only one of them paid pension insurance. All the others were employed, mostly as factory or production workers. It was rare for them to be promoted to a higher position, if at all. They were cleaners, assembly line workers, restaurant workers and so on. Interruptions in working life were already common under socialism, especially when they worked for private employers. It was rare for them to leave their jobs themselves. They lost it either because the company closed and collapsed or they were on long-term sick leave due to work-related injuries or for other reasons. This was especially the case after the transition from socialism to capitalism, when most of them were pushed into early retirement or lost their jobs. There were just three cases of reasonably stable employment.

Most were very poorly paid for their work. Some had good pay for a while, but it did not last long. They said that even two salaries were not enough to cover housing expenses or their children's schooling, so they took out loans even for small expenses like buying bedding. In general, more than half of them took out loans or deferred payments. Due to low incomes, many of them engaged in a range of undeclared work in grey economy in addition to their paid work, most commonly cleaning.

I went to the lady to make an appointment to clean up... she's such a good-hearted little old woman... that when you see her, you'd immediately hug her, even if it's the first time you've seen her ... And we made an appointment... But, of course, there was no trust or anything right away. You have to get trust.... I mean, I've been with her, yes, for thirty years. (Ferida, F, 71)

Partnerships and caring responsibilities

Two of them were not married, one was a single mother and is from the post-war generation. Less than half described their marriage as good, respectful and supportive. A quarter had divorced, mainly due to alcoholism and intimate partner violence.

Oo, you know how it is for me, when I got divorced, I thought that ... I had that ahead of me, when he would come, when he would be nasty to us again. And it was a disaster, my husband, not to talk about him, there was so little that was good that you couldn't stand it, most of it was bad. (Nadja, F, 70)

Those who divorced for these reasons had also lost the assets they had built up in the marriage by moving away to escape the violence. Some of them had already paid off their husbands' debts at the time of their marriage, and some inherited debts after their husbands' deaths. In very few cases, husbands got custody over children after the divorce and the mothers had little or no contact with the children until a later life.

Almost all of them took over caring responsibilities. They looked after younger children or cooked meals when they were still very young. Some started looking after sick parents or relatives at an early age. Later, some of them took care of their sick husbands who suffered from both occupational diseases and alcohol-related illnesses. Two cared for sick older people for payment.

Life after retirement and health

Most of the interviewed women were single at the time of the interview, two of them have never been married, sixteen of them are divorced or widowed and only two of them have no children.

In general, the health of the women interviewed was quite poor throughout their lives, with half of them reporting various illnesses from childhood. Typical childhood diseases such as scarlet fever, measles and others had a major impact on their health due to the poor living conditions. Just under half described their health at the time of the interview as good. Some of them had age-related illnesses, but did not attach great importance to them.

More than half owned apartments or houses, even though they had very low incomes. Around a third of the interviewees lived in rented accommodation, with some of them paying high rents or very high infrastructure costs.

I'm used to it, this room has been heated maybe 10 times as I've been here. I only heat it up for New Year's or birthdays... If I'm cold I cover up, watch TV, take the dog out, so practically the most I've used it is around five o'clock to seven o'clock in the afternoon. I turn it on for those two or three hours, and that's it. Now that the winters are so mild, I haven't even turned on the major heating for three years, I just use small electric radiator, which is 35 years old. (Marija, F, 70)

Many of them worked in grey economy either in addition or in-between jobs. The in-between jobs periods lasted several months, for some even several years. This was later reflected in their pension. Just under half of the women interviewed had retired with full-time employment, quite a few of them around the time of the political change (aged 50 to 55) or later. Some of them did not meet the requirements for retirement, i.e. at least 15 years of service, due to interruptions in their working lives or extensive unemployment. These respondents received cash benefits, only one of them received a widow's pension. They generally had the lowest income in old age, followed by those who receive disability pension.

Most of those who had a pension were receiving between 500 and 600 EUR or between 600 and 650 EUR. Some of them also received extraordinary financial assistance (one or two times a year for extraordinary costs, such as heating material for winter, payment of utility bills and similar). Around half of respondents received food parcels from Red Cross and Karitas. Some respondents had income from other sources, i.e. from renting out property, selling wood and crops.

All these activities also have an impact on the extent and strength of personal support networks. Most had medium and strong social networks, usually consisting of children or siblings. For most respondents, the network was narrow, but the ties were strong. Respondents could rely on their children and grandchildren to visit them often, go shopping, take them to the doctor, come to clean, bring food and the like. Most said that they had no worries and felt supported by their relatives.

My children take care of me, and they take care of me almost too much. Mostly the two boys. Which I think, as far as I understand, boys are better than women for mothers: 'Mum, will you have this, mum, will you have that? Mom, what do you need?' Here, they brought me lunch

(meals on wheels). My son pays for everything. ...They took me to the hospital seven times ... and that's not a little! (Luiza, F, 90)

More than half felt happy and calm in their old age. Especially women that experienced violence and came out of it are very happy although they have low incomes and must be very careful with money that does not cover all their needs. However, some respondents were also lonely and had only a weak support network.

Men's trajectories

Growing up and primary family

Almost all of the male interviewees originated from impoverished backgrounds. In most families both parents were farmers, or only the father was employed. Their parents were mostly poorly educated and employed in unskilled or semi-skilled occupations. Some individuals reported having experienced a relatively carefree childhood, whereas others indicated that they had been required to contribute to domestic tasks or even engage in agricultural or other labour from an early age.

I became a fieldhand, and all that nonsense... The neighbours were more [wealthy], but we were cotters [...] [When I was 14 or 15 years old] someone recommended I go to work on a boat, since I was a good cook. He told me I would work six months on a boat and then I would spend six months at school, and then six months on a boat and six at school again. And at the end I will become a cook or a waiter. And so I went. (Bine, M, 68)

For a significant number of interviewees fathers were alcohol dependent.

Education and early career

A significant share of the interviewees grew up in large families where they received limited support from their parents. For example, only a few interviewees indicated that their parents had encouraged them to pursue an education. Most of them had completed only primary school or less, with a few having completed vocational school and only two having obtained a university degree, one in law and the other in physics. The latter subsequently assumed the role of a secondary school teacher. However, he was compelled to resign due to political pressure and subsequently sought employment abroad, where he had engaged in various forms of informal economic activities for several years, including driving a taxi.

Working trajectories

Almost all of interviewees were employed in simple or medium-skilled jobs. The former category includes jobs such as peddler or plumber, while the latter encompasses jobs such as metalworker, truck driver or carpenter. A significant number stated that they had been engaged in physically demanding work with long working hours.

What we did... I was on the team that worked privately – on the railway! The wagon comes, and the load has to be transferred from wagon to wagon – a load that weighs half a tonne! By seven o'clock, I earned one daily wage and then I went to [a different town] for the day shift. (Zoran, M, 73)

Two interviewees reported being involved in criminal activities and having spent several years in prison, which also had a negative impact on their employability and financial stability.

More than half of interviewees had experienced one or more periods of unemployment, when they often delved into grey economy.

Furthermore, changes of employers and interruptions in employment career were also common features of their work trajectories. In most of the cases, job changes did not result in higher salary. One interviewee had completed several vocational qualifications (as a welder, a fitter, a conductor and a train driver) and had progressively advanced during his working life.

Financial strain, partnerships and caring responsibilities

Many of the interviewees had themselves incurred debts or were forced to borrow money at some point in their lives, which put noteworthy strain on their financial situation.

It's not the borrowing that's the problem, it's the paying it back. It accumulates and then it is very difficult to pay that money back. My wife says don't worry, you'll pay the next month, but then there's interest and it's even harder to pay. (Admir, M, 81)

Three interviewees were never married (one was only formally married on paper) and most of them had children (five were childless). For those that were divorced, their financial stability was affected as they had to pay child support. In less frequent cases, financial stability was threatened because their partner invested their joint assets poorly and recklessly or had alcohol and drug dependency.

It is noteworthy that none of the interviewees reported experiencing violence from an intimate partner. Nevertheless, some recounted engaging in altercations with other men. None reported providing long-term care for an ill partner, but some did indicate providing care for their parents.

[I've been taking care of my mother since I came back from abroad]... twenty years ago! [...] The only thing that bothers me is this. [...] Her teeth are falling out and I'm taking her to the dentist... I've taken her twice. That is to say, I have to put her in the trolley. I have to take the trolley to the dentist. Then I go to the farmer's market, because it's near [the dentist]. And I come back and I ask, 'Did you fix anything, did you do anything to her?' And they say, 'Yeah, we didn't want to bother her!' Yeah, but why did I bring her here?! (Peter, M, 73)

Life after retirement and health

Nine were single at the time of the interview, including those who were divorced or widowed and four were still married. Over half had suffered from significant health problems before reaching retirement age. Furthermore, many reported sufferings from occupational illnesses (e.g., lung problems due to inhaling chemicals, bone wear due to physically demanding work) which adversely impacted their ability to work. Consequently, only four of the interviewees had retired with a full working years. In contrast, only one had less than 15 years of service and was therefore not entitled to a pension. Two had retired on the grounds of disability. Some felt a sense of injustice upon retirement, as they realised some employers had not paid their insurance contributions for years.

The year I got my pension, the first thing I did was to investigate why it was so low. And then what now, if [the employer] didn't pay the contribution. They tell you that straight away, don't they. There was a minimal payment up there [...] I never imagined what a crisis one pension could be to a person. [...] And you can't even call that a pension. That's a dying subsidy, in my opinion. (Janez, M, 75)

At the time of the interview, the monthly income of four interviewees was less than 500 EUR, five had an income of between 500 and 700 EUR, three between 700 and 900 EUR and one had an income in excess of 900 EUR (but shared a household with a spouse that had no income). The majority owned the real-estate they lived in at the time of the interview, however most of their households were in poor condition and expensive to maintain. Following their retirement, some were

able to significantly augment their meagre pensions by engaging in grey economy, a practice that was no longer feasible at the time of the interview. Consequently, many were forced to seek social cash benefits, including extraordinary financial assistance and other forms of financial support.

The humiliation that I will be forced to ask somebody somewhere for something... That's... hard. It was hard for me to ask for social assistance. I walked around that building [centre for social work] for a long time, [...] but then I was just forced to go in. (Janez, M, 75)

In addition to financial hardship, more than half of the male interviewees mentioned a lack of social support, either through a lack of a solid social network or a lack of a reliable source of support within that network.

DISCUSSION

In the results section we presented distinct patterns of deprivation that emerged across different life stages that lead to old-age poverty for men and women. Now we turn to discuss the important similarities and differences between those patterns that led to old-age poverty.

In terms of family background, there were no significant differences between men and women. Both groups generally grew up in poor families, often in rural areas, with low parental education, what laid the foundation for lifelong poverty for both men and women. This finding is consistent with both the social stratification and the life course theories on poverty (Gabriel et al., 2015; Becker, 2016). Dragoš (2021) points to the phenomenon of the sticky floor and the sticky ceiling. Our results show that being born poor in early stages of socialism meant being stuck to the bottom, which further suggests that the social mobility up the social strata was very low despite socialism. In early stages of socialism social mobility was quite low, due to the absence of social policy measures that would enable schooling of children from poor families (e.g. scholarships, housing, etc.). Low educational attainment led to occupational segregation into manual and informal sectors, mirroring wider European patterns of poverty accumulation (Srakar et al., 2020).

In times of socialism most of the interviewees rented their homes from the municipality and bought them for a very low costs under the Housing Act of 1991 (after Slovenia declared independence from Yugoslavia), which regulated the privatisation of housing fond. However, most of these homes were modest, in poor condition and expensive to maintain. While our research supports the notion that housing security in old age is a crucial determinant of well-being (Kwan & Walsh, 2018), it also stresses that

substandard housing conditions and maintenance costs reflect “asset poverty” (Rank et al., 2008).

The phenomenon of early retirement was common among both men and women. Early retirement was in some cases related to health deterioration that was a consequence of physically demanding work, but more often a consequence of the restructuring of the economy following Slovenia's independence. Early retirement was often seen as a political solution to unemployment and industrial restructuring (Ebbinghaus, 2006), a solution that was adopted after the collapse of the industrial sector in 1990s. However, while the unemployment rate increased during the 1990s transition in Slovenia, it was still much lower than in other ex-Yugoslav countries (Kuhar & Reiter, 2010), in part due to early retirement policies (Mencinger, 1995).

In terms of differences, women generally had lower levels of education compared to men and significantly fewer professional qualifications. Gender differences in educational attainment were significant for the time before and soon after the second world war (Becker, 2016). This disparity in educational attainment had a long-lasting impact on their employment opportunities and income, contributing to greater economic vulnerability, what was confirmed in previous research which emphasised that low educational attainment is the strongest predictor of old-age poverty and a main source of gender differences (Novak, 2000; Gabriel et al., 2015). Carlsson et al. (2023) found that early life factors, including cognitive ability and stress resilience, both of which are often linked to educational attainment, explain a large part of the educational differences in early labour market exit, a known risk factor of old age poverty.

Female poverty in old age is in life course studies explained as a result of interruptions in working life due to caring responsibilities (Williams, 2010; Vlachantoni, 2010) and weak work-life balance (Misra et al., 2006). Many studies suggest that women's careers are more turbulent, more frequently interrupted and women are more likely to stay at home or leave the paid labour market due to caring responsibilities (Williams, 2010; DeRigne et al., 2022). Our research shows a different picture, as both the men and women frequently changed jobs and interrupted their employment, and often engaged in the grey economy, highlighting the notion that non-employment and under-employment severely decrease income in old age for both genders (Möhring, 2021). The difference was that women worked in low-paid, menial jobs and rarely had the opportunity for career advancement, meaning their wages were consistently low. In contrast, men tended to work in medium-skilled jobs and some were eventually promoted to more responsible positions with better pay. In line with previous research (Alksnis et al., 2008) gender differences in job type contributed to a significant pay

gap. In some cases, however, part of the income of men was paid in the form of financial supplements (such as daily allowances, overtime pay and the like), which were not pensionable as they were not part of the salary, resulting in a low pension entitlement despite decent earnings. The participation in grey economy is a particular problem for women as they earn less per hour than men what is conceptualised as “feminization of the informal labour” (Meagher, 2010), which emphasise that informal economy is not a source of empowerment for women, but rather a poverty trap (Jones & Nadin, 2025).

Marriage is generally associated with lower poverty risk, while divorce and widowhood are noted as risk factors, primarily for women (Fonseca et al., 2014). The area of partnerships and caregiving showed pronounced gender differences in our study which is also in line with previous research on gender inequalities in the private sphere (Williams, 2010). A larger proportion of women in our study had children, and many took primary responsibility for the care of both their children and older family members. While some men were the main carer or shared caring responsibilities for their parents, women were more likely to care for sick partners or other relatives or be paid to care for others.

The differences in income in our study persisted in retirement, as men received about 100 to 150 EUR higher pension than women, even though still under the poverty threshold. Low pensions force older people to either enter the grey market or to ask for social financial support or charity (food parcels or clothes at the Red Cross or Caritas). Here we found a clear gender difference, as men did not ask for support even though they urgently need it. In addition, some women relied on financial support from their personal networks to supplement their income.

The issue of social networks in old age is, according to our research, gender-specific, with women generally maintaining stronger social ties, often through their children or grandchildren. These networks provided women with both emotional and practical support, such as help with shopping or healthcare. Men were more likely to report weak or non-existent social networks, making them more vulnerable to loneliness and isolation, which has also been found in other studies (Hlebec & Kogovšek, 2003). A possible explanation for this difference is that men have fewer opportunities for support as they do not have strong family ties (Stratton & Moore, 2007) and are less likely to seek help from formal institutions (Kagan et al., 2018).

CONCLUSION

By investigating the lifelong accumulation of disadvantages among older men and women living in poverty in Slovenia, this study extends the life course theories of cumulative (dis)advantage to post-socialist contexts, revealing how intersecting structural forces – gendered care economies, labour market precarity, and welfare retrenchment – shape divergent poverty trajectories. The significant contribution of the presented study to the international research on gender differences in old-age poverty relates to labour market participation. Poor men and women have similar experiences of the labour market, both are involved in precarious and often exploitative employment, both have intermittent working lives, and both are forced to work a lot in the informal economy to survive, which, while reducing their poverty in the short term, increases it in the long term.

Hard work worsens their health and causes serious illnesses that lead to career interruptions and early retirement, resulting in low pensions. The study also shows that the precarious labour market was already developed under socialism, but during the transition from socialism to capitalism, workers’ protections cracked and the collapse of industry led to mass retirements, which in the long run worsened the economic situation.

Another important finding of the study is that poor women do not leave the labour market to care for children or sick family members, as this would put their livelihoods at risk. The interruptions in their careers are due to the precarious labour market. Women also do not have many opportunities for career advancement in the workplace, and if they do acquire qualifications, it does not guarantee them a higher salary, but more opportunities to participate in the informal economy (for example, sewing). Men, on the other hand, do sometimes advance in the workplace and are better paid in general. This underscores how patriarchal norms amplify economic precarity, a dimension absent in men’s accounts but critical to understanding intersectional disadvantage (Ahonen & Kuivalainen, 2024).

A difference that reflects the disadvantage of men is seen in the size and quality of social networks. Women generally had stronger support networks in old age, often relying on children or extended family for material and financial support. Men reported weaker social ties, especially if they did not have good relationships with children. This may reflect women’s particular skills acquired through the “hidden labour” of surviving in poverty – budgeting, negotiating bureaucracies and informal exchanges honed over decades of unpaid care work (Daly et. al., 2023; Möhring, 2021; Torres, 2014).

REVŠČINA V STAROSTI: RAZLIKE MED SPOLOMA V VSEŽIVLJENJSKI PRIKRAJŠANOSTI

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POVZETEK

Članek preučuje razlike med spoloma na področju revščine v starosti z zornega kota življenjskega poteka. S pomočjo kvalitativnih poglobljenih intervjujev s 33 posamezniki, starimi 65 let in več v Sloveniji, članek identificira spolno specifične vzorce prikrajšanosti, ki se skozi življenje akumulirajo in vodijo v starostno revščino. Ugotovitve glede podobnosti kažejo, da imajo tako moški kot ženske fragmentirane delovne zgodovine in so vključeni v sivo ekonomijo, vendar so ženske dodatno prikrajšane zaradi nižjih stopenj izobrazbe, skrbstvenih obveznosti in spolnih plačnih razlik. Tako moški kot ženske, ki se danes v starosti soočajo z revščino, so imeli razmeroma nizko izobražene starše in so odraščali v revnem okolju, kar osvetljuje medgeneracijski prenos revščine navkljub življenju v socializmu. Za oba spola je bila značilna zgodnja upokožitev, ki je bila delno posledica slabega zdravja, delno pa propada industrije po osamosvojitvi Slovenije. Ugotovitve glede razlik kažejo, da so kljub večjim skrbstvenim vlogam ženske dosegle stabilnejšo kariero in polno pokojninsko dobo, vendar so se pogosto soočale s povečano ranljivostjo zaradi nasilja v družini. Moški so imeli več možnosti za finančno napredovanje, vendar so se spopadali s šibkejšimi socialnimi vezmi in organiziranjem pomoči, kar odraža pomanjkanje izkušenj pri obvladovanju odgovornosti v zasebni sferi. Z osvetlitvijo medsebojnega vplivanja strukturnih neenakosti in individualnih potekov, ki vodijo v starostno revščino, ta članek prispeva k razumevanju načinov, kako se spolne specifični vzorci prikrajšanosti akumulirajo skozi čas.

Ključne besede: starostna revščina, razlike med spoloma, perspektiva življenjskega poteka, strukturne neenakosti, socializem

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NAVIGATING HARDSHIP: PRACTICAL STRATEGIES FOR COPING WITH POVERTY IN OLD AGE

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ABSTRACT

This article analyses the practical strategies used by older people living in poverty to navigate their social worlds, which, applying Pierre Bourdieu's theoretical framework, are framed by 'positional suffering' due to low social status. Qualitative data gathered from biographical interviews reveal strategies that include adjusting one's aspirations to what is attainable, adapting one's needs to match necessities, learned self-sufficiency, relentless prioritisation, an emphasis on cost-consciousness and stringent conservation, prioritisation by sacrifice and dispositions to 'make something out of nothing'. Crucially, these strategies emphasise that older people living in poverty are active agents navigating through hardship.

Keywords: old age, poverty, practical strategies, habitus, habitus of necessity

AFFRONTARE LE AVVERSITÀ: STRATEGIE PRATICHE PER GESTIRE L'INDIGENZA IN ETÀ AVANZATA

SINTESI

Il presente articolo analizza le strategie pratiche messe in atto dagli anziani che vivono in povertà per muoversi nel proprio mondo sociale, che, applicando il quadro teorico di Pierre Bourdieu, sono inquadrare entro la "sofferenza di posizione" dovuta al basso status sociale. I dati qualitativi raccolti dalle interviste biografiche rivelano strategie che includono l'orientamento delle aspirazioni a ciò che è raggiungibile, l'adattamento dei bisogni alle necessità, l'apprendimento dell'autosufficienza, la continua assegnazione di priorità, l'enfasi sull'attenzione ai costi, la propensione al sacrificio e la disposizione a 'creare qualcosa dal nulla'. Fondamentalmente, si tratta di strategie da cui gli anziani in povertà emergono come soggetti attivi che navigano attraverso le difficoltà.

Parole chiave: vecchieia, povertà, strategie pratiche, habitus, habitus della necessità

INTRODUCTION¹

Population ageing is a global phenomenon in the 21st century, and it is forecast that the number of people aged 65 and over will exceed the number of young people by 2050. The world's population is also expected to continue to grow over the next 50 or 60 years, reaching a peak of around 10.3 billion people in the mid-2080s, up from 8.2 billion in 2024 (UN, 2024). One in 11 people is now 65 or older, and the UN predicts that one in six will reach 65 by 2050 and one in three by 2150 (UN, 2019). The proportion of people aged over 80 is increasing the most, and this trend is also expected to continue. As life expectancy increases, so do the inequalities and risks related to old age, including poverty, which is the focus of our research and this paper. Considering that the population of older people is very heterogeneous, that the inequalities that manifest themselves in poverty are rooted in historical socio-political developments and that they cannot be explained solely in the context of an individual's current situation, life-course research is important for the study of poverty.

Old age poverty in Slovenia remains an underexplored research area. Existing studies in the social sciences have primarily focused on specific groups of older people – such as single, widowed women – their health challenges, the accessibility of services and certain strategies for coping with poverty in old age (Stropnik *et al.*, 2010; Hlebec *et al.*, 2010; 2016). Building on this body of work, this study seeks to further explore the strategies employed by older people living in poverty to navigate the hardships of everyday life by answering two research questions: Considering the formative power of 'ordinary suffering', how do such experiences shape an individual's orientation towards the world in terms of their expectations, aspirations and needs? What practical strategies do older people employ to engage with and navigate the hardships of everyday life?

This study seeks to complement existing research by viewing older people as active and knowledgeable agents who strive to navigate the constraining conditions of the world. To achieve this, we begin with an overview of studies examining the strategies they use to cope with hardship, followed by an introduction to the Bourdieusian theoretical framework that underpins our analysis. We then outline the study's methodology, present the empirical findings and conclude with a discussion embedded within the Bourdieusian framework.

NAVIGATING HARDSHIP

Old age is commonly perceived as a vulnerable stage of life characterised by, amongst other factors, reduced income and limited opportunities for consumption (Filipovič Hrast & Hlebec, 2015). Many people enter old age in poor health, often as a consequence of lifelong deprivation, and poverty becomes a significant determinant of health for older adults because it affects the conditions in which they live, what kind of food they can afford to eat, where they can shop, what health care they can access and so on (cf. Ostwald & Dyer, 2011, 71). Older people are also generally more susceptible to social isolation, but this is even more pronounced amongst those in poverty, who often find themselves living on the margins of society (Randel *et al.*, 1999). For many, poverty has been a defining condition throughout their lives, preventing them from saving for retirement, covering the costs of daily living and especially maintaining social relationships.

Older people develop various life strategies and coping mechanisms to manage poverty. In an extensive qualitative study of older adults in Slovenia, Hlebec *et al.* (2010, 43–85) conceptualised coping as a range of behaviours and actions that enable older people to function more effectively within their circumstances. They classified such strategies along three dimensions: (1) the level of activity (passive or active), (2) the type of actor (individual, family or community) and (3) the direction of action (inward- or outward-oriented).

Active strategies involve engagement and the use of available resources to mitigate social and financial deprivation and can include seeking additional sources of income and goods, achieving food self-sufficiency and sharing expenses amongst family members. However, as people age and their health deteriorates, the effectiveness of such strategies diminishes, leading to their gradual replacement by what Hlebec *et al.* (2010, 43–85) refer to as 'passive' strategies. These strategies primarily focus on restricting expenditures – reducing essential needs, limiting discretionary spending on treats and leisure activities and relying on support from organisations and associations. Older people who adopt passive strategies often face significant challenges in covering unexpected expenses and affording necessities, such as meat or adequate heating (Filipovič Hrast & Hlebec, 2015).

The second dimension considers strategies employed by socially isolated individuals with dysfunctional or limited social networks; family coping strategies used by those residing with family members in the same household; and community coping strategies, which can

¹ The study received financial support from the Slovenian Research and Innovation Agency (research core funding No. P5-0183; research project *Everyday life and life course of old people living in poverty*, funding No. J5-4587). The funder played no role in study design, collection, analysis, and interpretation of data neither in the decision to submit the article for publication. They accept no responsibility for contents.

include both formal (institutional care and social engagement) and informal (neighbourhood and community-based) social support. Both formal and informal support mechanisms have been found to play a crucial role in mitigating social exclusion (Filipovič Hrast & Hlebec, 2015). The third dimension distinguishes between inward-oriented actions, which focus on self-sufficiency as a means of managing poverty, and outward-oriented actions, which involve engaging with external support systems, including family and community networks, to alleviate financial and social hardship.

Intergenerational poverty is also a significant risk factor. The provision of care in old age is predominantly regarded as a family responsibility, particularly in countries in which formal care systems are less developed. Even in many developed countries, family care often occurs within extended families, with multiple generations cohabiting; such arrangements facilitate ageing in the community and outside institutions. In many developing countries, family also serves as the primary source of subsistence for older people (Randel et al., 1999), but in poor families, the capacity of younger generations to provide care for elderly family members is often constrained. The long-term consequences of poverty and economic insecurity can thus extend across multiple generations and, in extreme cases, both the younger and older generations can be at significant risk (Randel et al., 1999). Therefore, it is essential to examine poverty in old age and the coping strategies employed from a life-course perspective (Milne, 2022, 19–20).

INTRODUCING A BOURDIEUSIAN FRAMEWORK

The theoretical framework that underpins our empirical analysis is grounded in Bourdieusian theory. To understand the power of living in poverty to structure a person's orientation to the world and the practical logic of navigating hardship, we will rely predominantly on two concepts developed by Pierre Bourdieu throughout his work: *habitus* and *symbolic violence*. In the Bourdieusian sense, a habitus is a system of dispositions or inclinations and practical knowledge that is structured by objective social conditions and that, in turn, structures an agent's way of moving through the world (Atkinson, 2015; 2016; Bourdieu, 2020; Bourdieu & Wacquant, 1992; Wacquant, 2016; cf. Perger, 2023). Habitus formation is grounded in symbolic violence, which is predominantly invisible and subtle, imposing a dominant vision of the social world and its divisions (Bourdieu, 1992; 1996–1997; 2001) and acting as a structuring force for an agent's habitus. It is considered violent because it enforces an agent's 'social destiny' as emerging through their social position – and, in so doing, creates what Bourdieu calls *ontological correspondence*. This

a correspondence between objective conditions and subjective dispositions (Bourdieu & Wacquant, 1992), which tend to result in *ontological complicity* (Bourdieu, 1996–1997) and a fairly unquestioned social order.

This complicity manifests in an agent's view of the world as *taken for granted* – the practical sense of one's place and its tacit acceptance, including the limits it imposes. In short, precisely because the agent's dispositions to act and to engage with the world in particular ways are the product of the social world, the world itself tends to be taken for granted just as it is. This 'taken-for-granted-ness' tends to ensure that the social world – regardless of its hierarchies and dominations – *remains* just as it is by shaping an agent's dispositions towards the existing objective conditions, thus securing the ontological correspondence and complicity of dominated groups. In this sense, one's orientation to the world and practical strategies of engaging with it need to be understood as being *structured* by objective conditions – as being actualised by those conditions – but also as *structuring*, through the person's orientation and practices, those very same conditions.

We find this Bourdieusian framework particularly useful for studying older people's practical strategies for three main reasons. Firstly, Bourdieu's work, as evident in his seminal book on social suffering in contemporary society, *The Weight of the World* (1999, 4), enables us to approach poverty in its doubly captivating sense: to grasp the effects or 'real' suffering of *material* poverty (*la grande misère*), which are usually considered and problematised as *material* effects, and the effects of *ordinary* suffering (*la petite misère*) – the side of material poverty that is usually hidden and overlooked but at least as dark and which takes many *non-material* forms.² Put differently, with the help of Bourdieu, we approach material poverty as a phenomenon whose effects and consequences are not limited to the material but which reach 'deeper' by forming agents' orientation both to themselves and to the social world. Being exposed to 'positional suffering' – the suffering stemming from one's low social position and poverty (Bourdieu et al., 1999, 4; cf. Sayer, 2002) – shapes and moulds an agent; thus, the Bourdieusian approach to poverty enables us to grasp the symbolic violence of poverty and its many – including non-material – 'faces'.

Secondly, the Bourdieusian framework – particularly its concepts of symbolic power, violence and domination – encourages an examination of the effects of power and the reach of objective conditions in contexts in which individuality and individual responsibility are usually emphasised – in both everyday perceptions and socio-political discourse. Given the extensive intergenerational transmission of poverty – a reproductive logic in which people born into poverty are likely to remain

² As thematised by Reid (2002, 348), Bourdieu's approach refrains from approaching the social suffering in contemporary society purely in terms of *poverty* but rather aims to elucidate both poverty and the misery that poverty produces.

poor – a Bourdieusian approach urges us to ‘discover [symbolic power] where it is least visible, where it is most completely misrecognised ...’ (Bourdieu, 1992, 163) and where it is most often misinterpreted as the responsibility and choices of the individual, blaming them for their own poverty. We therefore conceptualise poverty as a matter of symbolic violence, operating through mechanisms of symbolic domination that shape an agent’s past, present and future, which enables us to distance ourselves from what *appears* to be individual malaise and to instead see that what appears “most dramatically intimate” is in fact “the most impersonal” (Bourdieu et al., 1999, 213, 391). It enables us to account for peoples’ subjective dispositions – to be ‘attuned to the structure of domination of which they are the product’ (Bourdieu, 2001, 41) – by accounting for objective social conditions (Bourdieu et al., 1999, 213, 391). In other words, an individual may indeed carry the weight, but the weight itself is that of the *world*.

Thirdly, the Bourdieusian approach seeks to transcend the prevalent – but ultimately false – antinomies of subjectivism and objectivism and of voluntarism and determinism (Bourdieu & Wacquant, 1992). It encourages us to approach people as *knowing* and *knowledgeable*, and although that knowledge is not (necessarily) theoretical or explicable – the kind easily put into a discourse, which reaches the level of consciousness and has a ‘reasoning reason’ (Bourdieu, 2000, 50) – people nonetheless possesses *practical knowledge*. Put differently, an agent possesses and embodies ‘reasonable reason’ (Bourdieu, 2000, 50) – a feel for the game or a practical comprehension and understanding of how the world is and how one should act within its social spaces. Thus, when we refer to the ‘strategies’ of older people living in poverty, we refer to them in this Bourdieusian sense: as practical actions and ways of engaging with the world and the conditions in which they live – as an ‘ordinary order of ordinary existence’ (Bourdieu, 2020, 68) – rather than as a matter of a ‘calculating subject’ who is strategising to improve their stakes, interests or profits (Bourdieu, 2000, 145).

METHODOLOGY

Methods

This article is based on a research project entitled *Everyday Life and Life Course of Old People Living in Poverty* and draws on qualitative empirical data collected through narrative biographical interviews. Qualitative research methods are suitable for gaining in-depth insight into experiential dimensions, and following Harding (2006), we approach narrative

biographical interviews not as a method of reproducing an objective and factitious life course but rather as creating space for an interpretatively rich understanding and for the interviewee’s reflections upon the past, which are unavoidably shaped by the present. However, looking back to the past from – and accounting for – the perspective of the present does not diminish the significance of the method. On the contrary, recounting one’s biography is treated as a process of interpreting and representing one’s life course and as an active process of *making* memories even while narrating them (Harding, 2006, 2). In this sense, we understand the biographical narrative interview as a method that – under certain conditions that are in no way simply *given* – enables a particular way of understanding the interviewee. It enables them to ‘explain themselves in the fullest sense of the term, that is, to construct their own point of view both about themselves and about the world’ and, significantly, to construct this viewpoint as ‘justified, not least for themselves’ (Bourdieu et al., 1999, 614–615).

For the interviews, a protocol based on an in-depth literature review was created. Following Van Regenmortel et al. (2019), this sought to go beyond the usual three-milestone structure of biographical interview: education, work and retirement. Instead, the protocol was semi-structured to explicitly provide space for the variety of building blocks of everyday life, including both the relational aspect of life and the interviewee’s narrative of the present and their imagined – and sometimes feared – future.

Sample

The sampling criteria were aligned with the research aims and questions – specifically, people at least 65 years of age who were below the official poverty threshold in Slovenia for 2024. We sought a high degree of heterogeneity, so purposive sampling was used, considering gender, nationality, marital status and the urban/rural divide. Participants were solicited by region along an axis from the Prekmurje region to the Coastal Karst region, enabling us to sample from areas with different GDPs per capita.³ We also had the help of institutional gatekeepers, which is an established procedure for reaching marginalised groups (Braun & Clarke, 2013) – specifically, the Centres for Social Work and the Red Cross, whose agents could reach older people living in poverty who might be willing to participate. To ensure transparency, those agents were informed of the research aims and sampling criteria and received instructions to secure consent from the potential interviewees for their personal data

³ According to the SURS data on regional gross domestic products per capita (GDP) in 2022, the Mura region and Central Sava Valley have the lowest GDPs while Central Slovenia and the Coastal-Karst region have the highest.

Table 1: Sample characteristics – aggregated sample.

Age	65–95 years, average 75.4
Gender	13 men, 20 women
Nationality at birth	Slovenian (21), Bosnian (5), Croatian (4), Serbian (2), Polish (1)
Regions	Central Slovenia (6), Coastal Karst (12), Littoral-Inner Carniola (5), Upper Carniola (2), Savinja (2), Mura (2), Drava (2), Central Sava (2)
Level of urbanisation ⁴	Densely-populated areas (cities, larger urban centres) (6); intermediate density areas (smaller cities, suburban areas, smaller urban centres) (16); thinly-populated areas (rural areas) (11)
Educational attainment	Unfinished primary school (6), Primary school (18), Vocational school (6), Secondary school (1), University degree (2)
Marital status	Single (6), Married (8), Divorced (9), Widow-er (10)
Household type	One person (23), Two persons (8), Three persons (2)

(names and contact information) to be forwarded to the research team. Five additional participants were enrolled with the help of personal connections and local informants.

The interviews varied in duration from 38 minutes to 238 minutes, with an average of 95 minutes, and were conducted by six interviewers. For six of the participants, two interviews were conducted, meaning a total of 39 interviews with 33 participants. All the participants provided written informed consent, which clearly stated the research aims and procedures and the researchers' obligations. Each received a 20 euros voucher for their participation. All the interviews were audio recorded and anonymised during verbatim transcription. To secure anonymity, each participant received a pseudonym, and the participants' personal data are stored separately from the anonymised empirical data, with access available only to the project team leadership. The research was approved by the Ethics Committee of the Faculty of Social Work, University of Ljubljana on December 4, 2023 (decision no. 033-3/2023-23).

Analysis

The data were analysed using MAXQDA 22 qualitative data analysis software following a combined deductive-inductive approach.⁵ Initially, a broad set of categories was deductively identified based on a comprehensive review of relevant literature. After thoroughly rereading the transcripts to familiarise themselves with the data,

the researchers then inductively identified additional categories from the participants' narratives, establishing more detailed coding levels, with each category and code clearly defined. The coding was conducted by two researchers, who independently analysed and coded the same ten transcripts, allowing for cross-validation and reliability in the interpretation of the data. The researchers then discussed the coding process and refined the coding scheme using an inductive approach. Any remaining issues and coding discrepancies were resolved through discussion, which is an established procedure to ensure intercoder reliability (Saldaña, 2009). The remaining 23 transcripts were divided between the two researchers, who each analysed and coded their respective portions of the remaining data. Intercoder reliability was ensured in regular meetings and discussions between the researchers to address and resolve any issues until the data analysis was complete.

RESULTS

We present data on the practical strategies employed by older people to navigate life in poverty, which are organised into three broad categories, each representing a key distinction between the coping strategies. Keeping in mind the research questions, which relate to one's orientation to the world in terms of expectations, aspirations and needs and the practical strategies used to navigate daily hardships, the first category captures the participants' narratives of becoming accustomed to

4 This classification is based on Settlements by level of urbanisation 2017 by the Statistical Office, Republic of Slovenia (STAT, n.d.). In densely-populated areas at least 50% of the population lives in high-density clusters, while in intermediate density areas less than 50% of the population lives in rural grid cells and less than 50% lives in high-density clusters. Thinly-populated areas have more than 50% of the population living in rural grid cells.

5 The empirical data supporting this study are securely stored by the project team and are available from the corresponding author upon reasonable request.

poverty, mostly from childhood onward, and thus developing a form of ‘skilfulness’ in navigating hardship out of necessity. The second category focuses on one’s broader orientation towards the world, while the third examines the practical aspects of navigating hardship, as evidenced by the participants’ particular dispositions or inclinations to act. We focus on analysing and discussing those strategies that are subjective and focused on individual agentic potential to act rather than those that incorporate other individuals and institutions in the sense of relying on help and support from other actors.

Primary formation of the habitus of necessity

Bourdieu approached his main conceptual building block – the habitus – as a matter of embodied social necessity (Bourdieu, 2008; 2010) – that is, the social world and its tendencies become embodied in the agent thus ensuring position-specific practices. In *Distinctions* (2010), Bourdieu elaborated on two main types of this embodiment: a taste for luxury and a taste for necessity. While each is a product of social conditions, the former is marked by a distance *from* necessity, which stems from an agent’s possession of capitals, whereas the latter is burdened by urgencies and necessities stemming from a lack of capitals, which, by extension, results in the ‘inescapable deprivation of necessary goods’ (Bourdieu, 2010, 373).

The relevance of the primary habitus – whose dispositions are the most durable and which is formed in early childhood, within the family setting and the social conditions surrounding it (Bourdieu & Wacquant, 1992, 133) under conditions of necessity – is evident from the participants’ narratives on being used to living in poverty. More explicitly, it is clear from those that recall childhood as the beginning of a long process of embodying the necessary skills to navigate hardship. Because they acquired those skills early by growing up in poverty, they can skilfully navigate through the same conditions of hardship now. We can therefore speak of a *hardened habitus of necessity* – of being used to living in poverty when younger and thus used to living in poverty when older: the past blurs into the present in an all-too-familiar guise. It is early exposure that equips an agent with the necessary dispositions to navigate hardship when older:

*No, I just save [money]. Because my mother was also strict, because she worked for families that were frugal.*⁶ (Majda, F, 83)⁷

This hardened habitus of necessity also encompasses a particular disposition of *necessitated self-sufficiency*, which is a skill mastered early that persists into one’s old age. Because the world is unreliable, unpredictable and unsupportive of one’s life, one feels the need to rely – by necessity – on oneself:

Everything we struggled through in life, we [struggled] on our own. We didn’t turn to anyone, not to the union, not to the social workers ... We just knew this is how much salary we have, this is how much money we have – and we got by. We lived in such a way that ... that we didn’t run out. Somehow, we always had just enough. (Enis, M, 73)

Most of the participants were, in fact, born into poverty and were living in poverty in their old age.⁸ The primary structure of the habitus of necessity thus tends to extend into one’s old age and does so precisely because today’s social conditions remain the same as yesterday’s and thus call into action the same dispositions that were formed when young. Their practical sense – ‘a feel for the game’ – has been mastered such that ‘we got by’ precisely because of continuous exposure to the same conditions that condemn a person to ‘just get by’.

The *amor fati* and ‘it is what it is’ orientation to the world

The hardened habitus of necessity also encompasses what Bourdieu called a ‘form of adaptation to and consequent[ly] acceptance of the necessary’ (Bourdieu, 2010, 373). In his book *In Other Words*, Bourdieu (1990a, 11) referred to the ‘acceptance of the necessary’ as a ‘sour grapes’ factor, representing the adjustments of an agent’s dispositions to their social position – to what is available and reachable for them given their social standing. Motivated by ‘sour grapes’, an agent forgoes any hopes of flying high; instead, their hopes, expectations and orientation to the present and future are firmly grounded in the necessities of yesterday, today and tomorrow.

6 The quotes were translated from Slovene to English by the authors.

7 Every quote is accompanied by a name, gender designation and age at the time of the interview.

8 The space limit does not allow us to compare in detail two different groups of older people living in poverty, those who were born in poverty and who continue to live in poverty in older age on one hand, and those who were not born in poverty, but fell into poverty later in life, on the other. However, data implies that the second group, which experienced downward social mobility, navigates through the hardship in older age with greater difficulties in terms of affects as well as of adjusting dispositions to now changed conditions. This is aligned with other studies on cleft habitus, of habitus being formed in one set of social conditions, but later being realised in a different set of conditions (Bourdieu, 2008; cf. Perger, 2023).

Rather than this ‘acceptance of the necessary’ being understood as a matter for the individual alone, we approach it in relational terms as a product of the harmonised relationship between social conditions on one hand and the agent’s dispositions on the other, which are themselves a product of the same conditions. The alignment of conditions and dispositions creates an acceptance of one’s social destiny as a given – almost unchangeable, barring some sort of a miracle – and not amenable to questioning. Bourdieu (2000, 143) calls this *amor fati* – the phenomenon of making a virtue out of necessity, of loving and accepting what is given. This orientation to the world and one’s place in it forms a foundation for one’s practical strategies: taking a social destiny of poverty as a necessity, one can only develop practical strategies to carry that weight. This is evident in the participants’ narratives of shaping their expectations, aspirations and needs to the realisable and achievable. Put differently, their expectations and needs are framed within the path of their social destiny and the limits of their social position – in short, their poverty.

I don’t have any special needs; I don’t need ... Well, I don’t want to borrow [from others], and I don’t want to ask [others] ... Well, you see I have food; I’m clothed – I’m more than clothed. (Peter, M, 73)

No. I’ve already become used to it.

Interviewer: *So, could you say that, at this moment ... with the life you have now, you are satisfied?*

Yes. I have to be, in the end, right? [pause] (Bine, M, 68)

I have been happy my whole life; I have no complaints ... Well, I don’t know, that’s just how I am. And even if I live to be a hundred, I can’t say otherwise; [life] has been good to me, and [I hope] it will continue to be good. (Majda, F, 83)

This adjustment, which was evident amongst the participants, is not necessarily accompanied by sighs of resignation or desperation because that would imply a desire for something else that must be abandoned – a drive to live one’s life otherwise. On the contrary, the adjustment is experienced as a matter of fact – ‘it is what it is’ and ‘that’s just how I am’ – or as a matter of *pragmata*, as something one simply needs to get used to. In that sense, *amor fati* represents a guiding principle of practical strategies skillfully developed to navigate the world of hardship ‘as it is’, to which we turn in the next section.

Practical knowledge: Subjective dispositions to manoeuvre through necessities

In terms of practical strategies – framed by the *amor fati* orientation towards and relationship with the world – we identified six distinctive, practical strategies for navigating hardship from the participants’ narratives. These strategies are interrelated – all forged by necessity, urgency and lack of capitals – yet each has a particular focus. The first two practical strategies focus on *prioritisation*, and we begin with *prioritisation by sacrifice*. This strategy encompasses giving up something – an object or practice – to be able to satisfy needs that are more pressing. What one gives up varies and may be something small, such as buying coffee⁹ or postponing the purchase of a necessary household appliance. The key point of this strategy is that one gives up something deemed less necessary to have something else deemed more necessary. This prioritisation, effectively necessitated by social conditions, is thus always accompanied by a sacrifice, and the potential scope of such upfront losses – all that an agent might give up to satisfy basic needs – is vast.

My wife says, ‘Do you have a euro to go [get a coffee]?’ I said, ‘I’ll use that euro to buy half a loaf of bread, the cheap one!’ And then ... what do I see? English bread – €7.99 per kilo of English bread! [with indignation and bitter sarcasm] (Zoran, M, 73)

Interviewer: *Has it ever happened, for example, that you needed to buy something big but simply didn’t have the means?*

Yes, [the money] just wasn’t there, you know. We had to wait a long time for it to come. (Anica, F, 73)

And then he said, ‘Are you going to take the stove now too?’ I said, ‘No, no, no, let’s leave it! The washing machine will be more important if it breaks down!’ That will need to be taken care of first. (Sonja, F, 65)

This practical strategy of prioritisation by sacrifice is closely related to the second prioritisation strategy: *relentless prioritisation*, based on the idea of ‘never falling behind’. In this context, paying monthly expenses takes absolute precedence, and all other expenses are subordinate.

Because the bills need to be paid ... but you also need to eat! And if you don’t pay one [bill], the next month it’s even worse. The first thing I do is pay everything. Because if you pile them up... (Sonja, F, 65)

⁹ Despite appearing innocent, such small practices predominantly serve as the anchoring rituals of everyday life, whose accessibility tend to be taken for granted. However, the data show that the ability to take these micro rituals for granted is unequally distributed.

Interviewer: *Did you always do it this way, paying the bills first and then everything else? Regardless of how little money there was? I first paid the bills, like for [health insurance] and such.* (Majda, F, 83)

Practical sense guided by this prioritisation strategy reflects an ominous reality: ‘because if you pile them up...’. This warning highlights the consequences of what happens if one ‘falls behind’, which can be particularly dire because one’s space for manoeuvre is already narrow and confined to necessities, which is reflected in Majda’s narrative of having once ‘fallen behind’:

Once, one year, things got so bad because I had to pay for what-not, and [after paying the bills], I couldn’t even buy a litre of oil for a month. But I got through that ... but this [was a lesson] – when I couldn’t even buy a litre of oil. But I survived; I told myself I needed to, and that’s it. (Majda, F, 83)

The next two practical strategies reflect dispositions towards *cost-consciousness* and *stringent conservation* and encompass practices that aim to lower the costs of everyday life as much as possible, either in everyday consumption or by lowering monthly costs – which may already be absolutely prioritised, as described above. Both strategies – the first implying a cognitive approach to the world that entails constant calculations of what is affordable for ‘the likes of them’ and the second being a practical realisation of that approach – show how the practical sense of people in poverty is burdened with the sense of necessities and urgencies. The need to ‘get by’ exerts cognitive and affective pressure on how one navigates everyday life, which does not reflect spontaneity but rather constant and almost subconscious calculations.¹⁰ This is illustrated by the following quotes, which highlight the extent of the cost-consciousness one can be forced to develop by social conditions:

Interviewer: *What about stores? Do you pay attention to where things cost less?*
 Yes, we go from store to store and calculate where things cost less. Then we go back to where it’s cheaper. You know exactly where you need to go. (Admir, M, 81, and his son)

I know exactly what I will buy and where ... Otherwise, I keep an eye on sales, for example, for laundry detergent. I check everything, all the ads

... So, for bigger things ... we calculate how much toilet paper we use, just so you know! We have to buy enough to last the entire month. (Sonja, F, 65)

This disposition towards stringent conservation entails practical efforts to lower monthly costs and is thus closely related to prioritisation by sacrifice because one may give up an object or practice, such as a heated room, to lower costs and thus be able to pay monthly bills. However, while prioritisation by sacrifice emphasises the practical sacrifices themselves, stringent conservation highlights one’s orientation to the world with applies ‘tightening the belt’ being an all-encompassing principle that grounds every action.

Well ... 70 euros. I have two water heaters – this small one and that one over there, for the shower. But I’ve turned that one off now because ... why would you shower now? Yeah ... once, twice per month, just to get a little wet ... That’s it. That one – that one consumes ... it’s a 60-litre one! (Zdenko, M, 72)

Then the hallway that ... I would go down to see the janitor [to turn off the heating in the common corridors] ... I’m saving; I have closed radiators ... and I sit in the dark. I’ve let myself have the TV. I’m stringent with washing – only when I gather enough [clothes]. And the bill came to 45 euros.

Interviewer: *Despite saving, right?*
I have nothing. The light – this, this little light – I bought it for a few euros; it doesn’t consume anything ... I have dark in here; no point in lighting everything, right, if I’m not afraid of anyone or anything, right? (Sabina, F, 75)

Now that you’re at home, yes, it’s cold; you can’t afford to turn it on to the maximum, right? If I turn it on to the maximum, then goodbye money, then everything goes for electricity, right? You have to be very careful with money; that’s what I’ve learned now. (Janez, M, 75)

These four practical strategies – relentless prioritisation, including by sacrifice, and the dispositions towards cost-consciousness and stringent conservation – are all accompanied by the fifth: the need to *work with what you have*. This broad disposition engages a person’s skillfulness in persisting despite social conditions that create an unstable and insecure everyday life. Considering

¹⁰ This gives a particular twist to ‘personal enterprise’ as the ideal form of a contemporary neoliberal person who ‘calculate[s] his gains and loses’ (Dardot & Laval, 2017, 265). Older people living in poverty calculate costs quite literally, down to minor details, with the goal – most importantly – of achieving net-zero value rather than accumulating profit. Ironically, these calculating practices resemble and approximate more the ‘old economic man’ rather than the neoliberal entrepreneurial self, who not only calculates but also projects himself into the future and ‘works on himself’ to maximize his ‘human capital’ (Dardot & Laval, 2017, 265).

their position, an agent can be forced to ‘make something out of nothing’ – to seek sources of stability amidst inherent social instability, to find resources to ensure one’s persistence and to identify ways to satisfy basic needs. Rather than glorifying practical resourcefulness, this disposition should be understood as being forced by social conditions. This can be seen in the example of Sabina, below, who reported various practices to ‘make something’ from food that was destined for waste but was nonetheless useable and edible – but only ‘if you have nothing’. It can also be seen in the narrative of Ivo, who reported seeking additional income from temporary jobs or casual work, yet because such income was inherently unstable, the promise of those attempts was just as unstable and unpredictable as his living conditions. Thus, at best, the successful pursuit of additional income is a welcome addition to the state of poverty rather than a source of stability. In other words, rather than a *solution* to the urgencies of everyday life, ‘making something out of nothing’ is simply an urgent response to those same urgencies.

He called me and said, ‘listen, if by any chance [you need food]’ – this is not fresh food, right? But if you have nothing, it’s good and all, right? Well, ... I peel everything, everything, right? Whatever, and then I fry it; you have it for that; you have it for risotto; you have it for making some vegetable pizza; you can use it for everything, right? (Sabina, F, 75)

If I earned 20 euros every day, I would ... live well! But ... you can’t; it’s hard ... you can get these jobs, but to be able to say every day that you’ll get money ... you get to work here, there ... but these aren’t regular jobs. (Ivo, M, 66)

Finally, the participants described *anticipating and preparing for additional adversities* – the sixth practical strategy. For some, such preparation was unachievable due to their minimal resources, yet for others, anticipation of adversities significantly shaped their orientation to the future. In *Pascalian Meditation* (2000), Bourdieu emphasised how one’s relationship with time is a matter of symbolic power and domination as well as social position. For marginalised people – ‘people without a future, living at the mercy of what each day brings’ (Bourdieu, 2000, 221; for a Bourdieusian discussion on time, cf. Atkinson, 2019) – the relationship with time is burdened by a lack of control over what the future may bring.

Anticipating and preparing for additional adversities mostly comprises hoarding, which Bourdieu (1990b) contrasted with saving. Whereas the latter implies capitalistic accumulation that is available for future investment, the first predominantly implies ‘deferred and potential consumption to ensure [an agent’s] security’

(Bourdieu, 1990b, 227). In this sense, the future is awaited and anticipated fearfully because foresight stems from past and present adversities, making one view any minor or major future adversity as potentially fatal.

Interviewer: Are you saving for any particular reason or just to have something on the side? Just to have something on the side. You never know what might come. Death can come quickly, you know. (Anica, F, 73)

There was a loaf of bread on the ground ... I put it in the basket and took it with me. Yes, I wouldn’t [leave bread on the ground]. Bread is our divine gift, you know. It might not always be available. If there’s another harvest like this, with hail, it can destroy everything, you know. (Majda, F, 83)

The adversities that are anticipated and feared include, as is evident from the participants’ narratives, the deaths of significant others, which are feared not only for the deaths themselves but also for the burial costs or the loss of an income stream. Adversities are even envisioned from natural disasters, which may severely hinder one’s self-sufficiency practices, such as those related to food production.

DISCUSSION AND CONCLUDING REMARKS

Studies of poverty amongst older people predominantly discuss and analyse their everyday lives in broad, generalised terms, and their specific strategies to cope with hardship thus remain underexplored. A notable exception is a qualitative study by Hlebec et al. (2010), which provides an in-depth examination of the life strategies of older adults living in poverty. In that study, the authors categorised these strategies by their focus on activity, actor and direction of action, but we diverge from that typology (Hlebec et al., 2010) to focus on subjective dispositions and practical strategies. We deliberately set aside the relational aspects of practical strategies for navigating hardship, such as reliance on primary social ties, community networks and social institutions, not because they are insignificant but to allow for a more detailed examination of subjective strategies. This approach has enabled us to more thoroughly explore affective adjustments in people’s orientations towards the present and future and their practical knowledge and dispositions.

The empirical data show that the participants predominantly rely on what Hlebec et al. (2010) characterised as passive strategies, which is somewhat in line with their finding that such strategies come to dominate as people age and their health deteriorates.

Approaching the question of practical strategies within a Bourdieusian framework presents an older

person as a knowledgeable agent who embodies and is endowed with agentic potentialities. Thus, rather than distinguishing practical strategies by their activity or passivity, we seek to transcend this antinomy and view strategies as *always active* and *agentic* because they inherently manifest an person's *agency to cope* with hardship. However, we do distinguish between various dispositions in considering their main element of practical reason. We thus distinguish practical strategies or dispositions in terms of their affective orientation to living conditions – that is, the *amor fati*. Such an orientation could easily be misunderstood as resignation and passivity, but we argue that it is an active adaptation to past and present living conditions – an adaptation that actively stems from an agent's immersion in social conditions of poverty – and to their conditioning effects, which actualise the disposition to accept the conditions as a given (Bourdieu et al., 1999). If social conditions are experienced as simply given – ‘it is what it is’, ‘that’s just how I am’ – one must practically learn to carry the weight of that social destiny and thus develop strategies to navigate the hardship.

These strategies can be distinguished by aspects of the agent's *practical* reason or their dispositions – that is, of *habitus*. We thus identified dispositions of prioritisation – urgently needing to avoid ‘falling behind’ by relentlessly prioritising what is deemed most necessary and sacrificing what is deemed less urgent in a world full of urgencies; of cost-consciousness and of stringent conservation of the resources at one's disposal; of ‘working with what you have’ and ‘making something out of nothing’; and of anticipating and preparing for additional adversities.

These strategies, we argue, should be understood in the broader context of the everyday lives of older people living in poverty being burdened with constant necessities – what needs to be done to ‘get by’ – and

urgencies – what needs to be done to avoid ‘falling behind’ – necessitated by the social conditions of hardship. More importantly, these strategies demonstrate an active orientation to the lifeworld of poverty – an active taking of matters into one's own hands, despite the undoubtedly diminished tools and practical resources at one's disposal. Thus, the main factor determining the practical orientation of these strategies is the search for control over what has already happened and what is to come in the near future. However, because ‘the real power to control that future’ is founded on ‘having a grasp on the present itself’ (Bourdieu, 2000, 221), the near future is experienced as threatening and unpredictable – and thus accompanied by anticipating and preparing for adversities – and is experienced as such precisely because one's options to control the present are diminished.

With people socially encouraged to take the world for granted, to naturalise and, by extension, to depoliticise it – an easy task given the proliferation and intensification of dominant neoliberal discourses (cf. Dardot & Laval, 2017; Brown, 2019) and the marginalisation of discourses seeking to collectivise contemporary sufferings – the world tends to deliver on its threat of remaining just as it is. For those carrying the weight of the world, the taken-for-granted attitude of ‘it is what it is’ appears as a Pyrrhic victory. Indeed, this taken-for-granted attitude smooths out and refines the skills for navigating the world of hardship, but it does so at a high price that tends to remain invisible and unaccounted for. This price includes the world and its conditions that remain unchallenged, but perhaps the most of all the ontological complicity of the dominated people themselves with the rules of the social game – the very rules that create their suffering and hardship. In other words, the greatest cost appears to be the effect of symbolic domination *par excellence*.¹¹

¹¹ We thank the reviewer for encouraging us to elaborate on this point.

SPOPRIJEMANJE S STISKAMI VSAKDANA: PRAKTIČNE STRATEGIJE ŽIVLJENJA Z REVŠČINO V STAROSTI

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POVZETEK

V članku analiziramo praktične strategije navigiranja skozi življenje v revščini med starejšimi. Analiza temelji na kvalitativnih podatkih, pridobljenih z metodo narativnih biografskih intervjujev, ki je še posebej primerna metoda za pridobivanje poglobljenega vpogleda v pojavnost življenja v revščini, ki jo lahko celoviteje razumemo le v kontekstu življenjskega trajektorija kot takega. Vzorec predstavlja 33 starejših oseb, ki živijo pod pragom revščine, s katerimi je bilo skupno opravljenih 39 intervjujev. Podatke analiziramo s pomočjo teoretskega okvira Pierra Bourdieuja, ki spodbuja razumevanje revščine z ozirom na njene materialne in simbolne učinke in ki pojavnost revščine neposredno umešča v kontekst razmerij moči. Bourdiejevski pristop obenem spodbuja razumevanje praktičnega delovanja starejših oseb onkraj antinomije subjektivizma in objektivizma. V tem oziru omogoča in spodbuja razumevanje praktičnega delovanja vedočih agentov kot načinov njihovega spoprijemanja s svetom, s pogoji življenja, ki jih oblikuje ta družbeni svet, ter z lastno pozicioniranostjo v njem. Na podlagi tega v prispevku analiziramo praktične strategije, tudi z ozirom na formiranje primarnega habitusa, zaznamovanega s pogoji nujnosti, in privzemanja realnosti revščine kot samoumevne. Z analizo podatkov ločujemo med strategijami prioritizacije – tako nenehne prioritizacije kot tudi prioritizacije, ki terja žrtvovanje in odpovedi; med strategijami nenehnega ozaveščanja stroškov in stroge varčnosti; ter dispoziciji »ustvarjanja nečesa iz ničesar« in anticipiranja dodatnih stisk. Podatki razkrivajo ključno tendenco na strani starejših oseb, ki živijo v revščini, tj. privzemanje realnosti revščine kot samoumevne, ki je tudi tista ključna dispozicija, ki agente preusmerja stran od prevpraševanja in problematiziranja same realnosti revščine.

Ključne besede: starost, revščina, praktične strategije, habitus, habitus nuje

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POVERTY IN SLOVENIA THROUGH THE KEY THEMES IN A LIFE COURSE APPROACH

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ABSTRACT

In this paper we present results of a qualitative study on the life course and everyday life of poor elderly people in Slovenia. 33 in-depth biographical interviews were conducted with individuals aged 65 and over living in poverty. By examining empirical data through the lens of the key themes of the life course approach, the aim of the article is to illuminate the intricate ways in which poverty unfolds and develops over time, in different periods of life as well as different in life trajectories, such as education, employment, family and health trajectory.

Keywords: poverty, old people, life course, transition, linked lives, cumulative poverty, social and historical context

LA POVERTÀ IN SLOVENIA ATTRAVERSO I TEMI CHIAVE DELL'APPROCCIO DEL CORSO DI VITA

SINTESI

Nell'articolo presentiamo i risultati di uno studio qualitativo sul corso di vita e sulla vita quotidiana degli anziani indigenti in Slovenia. Sono state condotte 33 interviste biografiche approfondite con individui di età pari o superiore a 65 anni che vivono in povertà. Lo scopo dell'articolo è quello di far luce sui modi complessi in cui la povertà si manifesta e si sviluppa nel tempo, in diverse fasi della vita e lungo varie traiettorie, come quelle educative, lavorative, familiari e sanitarie, utilizzando dati empirici attraverso la lente dei temi chiave dell'approccio del corso di vita.

Parole chiave: povertà, anziani, corso di vita, transizione, vite connesse, povertà cumulativa, contesto sociale e storico

INTRODUCTION¹

Poor children have more than their share of problems. They usually weigh less than rich children at birth and are more likely to die in their first year of life. When they enter school, poor children score lower on standardized tests, and this remains true through high school. Poor children are also absent from school more often and have more behaviour problems than affluent children. Poor teenagers are more likely than teenagers from affluent families to have a baby, drop out of high school, and get in trouble with the law. Young adults who were poor as children complete fewer years of schooling, work fewer hours, and earn lower wages than young adults raised in affluent families. As a result, children raised in poverty are more likely to end up poor and in need of public assistance when they become adults. (Mayer, 1997, 1)

This quote, written by Susan Mayer over 25 years ago, vividly illustrates the cumulative effects of poverty across different life stages and various trajectories in life (educational, employment, health trajectories, to name but a few) and is a strong argument for a life course approach to poverty research. It also underlines that poverty is a multi-layered process along individual life courses, rather than viewing poverty as a static fact, a state at a particular point in time. “Inequalities are processes and not static, measurable circumstances. They are in the making over the life course, interacting with each other, accumulating, attenuating, reproducing or spinning off along the way” (Nico & Pollock, 2021, 1). Poverty is a central topic of social science research as it affects all levels of social life, from the individual to the global level. However, much of the research focuses on the prevalence, measurement, international comparisons and distribution of income and inequality (Milanović, 2016; Halvorsen & Hvinden, 2016; Stiglitz, 2013; Banerjee & Duflo, 2011). These studies have undoubtedly contributed significantly to our understanding of the mechanisms and structural conditions that cause and maintain poverty and inequality. While quantitative data reveal the extent, trends and demographic characteristics of poverty, they offer only limited insights into the reproduction of poverty, its intergenerational consequences and how individuals experience and cope with it. Furthermore, they are not sufficient to develop policy

measures that consider the multiple effects of poverty in different areas of life (Lister, 2004; Leskošek, 2012). This underlines the importance of qualitative research methods to explore poverty in more depth using a life course and everyday life approach (Dewilde, 2003; Schaffner Goldberg, 2010; Rank & Hirschl, 2015; Švab, 2018). Everyday life research examines actions, discursive practices, and cognitive behaviours in the context of lived experiences (Ule, 2018), while the life course approach allows for the analysis of changes and connections between everyday life and broader social contexts over time, linking social changes, structures and individual behaviour (Elder & Giele, 2009).

Poverty is a dynamic and multi-layered process that unfolds over the course of a person’s life, rather than a static state that is recorded at a specific point in time. It is also significantly shaped by important transitions and turning points that occur at crossroads in the individual life course and represent moments of vulnerability or opportunity and determine whether individuals and families fall into poverty, remain in poverty or even escape it. There are many examples of such transitions in our lives, such as entering the education system, completing (or failing to complete) an education, entering the labour market, the birth of a child or retirement. Sometimes transitions also follow drastic life events such as marriage, accident or illness. Such transitions are crucial, not only because of their immediate economic impact, but also because of their cumulative effects over time, creating risks or opening up opportunities for advancement. Understanding poverty through the life course approach allows for a more comprehensive analysis of its causes and trajectories, emphasising the interplay of individual agency, structural constraints and the timing of life events (Elder, 1998; Hutchison, 2019).

The life course perspective is a comprehensive, interdisciplinary framework for the study of human life from birth to death (Mayer, 2009). It focuses on understanding the ways in which individuals’ lives unfold over time and how these lives are shaped by both personal experiences and socio-historical contexts. Crucial to the life course perspective is the recognition that human development continues throughout the life course, reminding us that “no life stage or period can be understood in isolation from others” (Johnson et al., 2011, 273). The life course approach allows us to identify and examine critical moments or turning points in the life course where both risks and opportunities accumulate (Heinz, 1997; Heinz et al., 2009). Therefore, the life course

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focuses on understanding how a person's life unfolds and develops over time, in different life stages such as childhood, adolescence, adulthood and old age, as well as in different life domains such as education, family and health (Ule, 2011).

Poverty is a pervasive problem that strongly influences the life trajectories of individuals and families across the life course. Understanding poverty requires a multidimensional perspective that considers the temporal, relational and contextual dimensions. The life course approach provides a comprehensive framework for analysing poverty and emphasises how individual experiences are shaped by broader social structures and historical changes. It allows for the exploration of change and impact and the interconnectedness of everyday life and social context over time. It enables the study of connections between social change, social structure and the expectations and behaviours of individuals (Elder & Giele, 2009). This approach is particularly relevant to social work, which seeks to examine the intersection of personal experiences of poverty and anti-poverty interventions in order to evaluate their effectiveness and identify barriers to success (Parrott, 2014; Leskošek & Dragoš, 2014; Cummins, 2018). By examining empirical data through the lens of the key themes of the life course approach – interplay of human life and historical time, timing of lives, linked lives, human agency, diversity, and developmental risk and protection (Elder, 1974; 1998; Elder & Giele, 2009; Hutchison, 2019) – this paper seeks to illuminate the intricate ways in which poverty unfolds over time and across generations.

Central to this analysis is *the interplay of human lives and historical time*, which highlights how historical periods, events and societal changes influence the life course and patterns of poverty in a given society. The *timing of lives* emphasises the importance of the time at which poverty is experienced, especially during critical transitions such as childhood, adolescence or old age. How strongly and in what way a particular life event affects us is closely related to the stage of life and the age at which it occurs (e.g. a teenage pregnancy or the loss of a parent at the age of 3, 10, 20 or 60 – each event has a different impact on our lives). The theme of *interlinked or interdependent lives* emphasises the interconnectedness of family and community relationships and highlights how poverty affects not only the individual but also the people in their social networks.

In addition, the focus is on *human agency and decision-making*, looking at how individuals deal with and respond to poverty within the constraints and opportunities of their environment. People actively shape the course of their lives through decisions and choices, even though the social world influences

them considerably through norms, expectations, restrictions, opportunities and possibilities. The life course perspective also draws attention to *the diversity of life course trajectories* and recognises that life paths and also experiences of poverty are different in different social groups and are influenced by factors such as gender, ethnicity and socio-economic background.

Finally, the area of *developmental risk and protection* examines how poverty interacts with risk factors and protective mechanisms and shapes developmental outcomes across the lifespan. This is because an individual's decisions, choices, milestones, transitions and life experiences influence all subsequent transitions and events. These experiences either act as protective factors for the individual's life course or pose risks and obstacles. The key idea of this topic is that no phase of life can be studied, analysed or understood in isolation from other phases. Certain advantages or disadvantages that we possess tend to have a cumulative effect. This approach allows us to think about the cumulative consequences of life experiences throughout our life course and helps us to understand and define the role and impact of these experiences and transitions on our trajectories. In this context, sociology is particularly interested in socially constructed cumulative advantages and disadvantages – how social institutions and structures develop mechanisms that increasingly favour those who succeed early in life, while reinforcing disadvantages for those who start from a less favourable position and strive to improve it (Ferraro et al., 2009). Research shows that poverty tends to accumulate, with early disadvantages compounding over the life course. Slovenia is characterised by relatively low social mobility; people who are born into poverty often remain in it (Dragoš, 2020), which means that poverty is passed on from generation to generation. The concept of cumulative risk – the layering of disadvantage over time – illustrates how early experiences of poverty, poor education, precarious employment and health inequalities come together, often trapping individuals in a cycle of disadvantage (DiPrete & Eirich, 2006). At the same time, life course transitions also provide opportunities for recovery through protective factors such as stable employment, access to social safety nets and supportive family structures (Elder, 1998; Mayer, 2009).

By addressing these issues, this article aims to provide a nuanced analysis of poverty over the life course. Using empirical data and applying a deductive approach, it examines the dynamic processes that maintain or mitigate poverty and emphasises the importance of taking a holistic perspective to inform policies and interventions to reduce poverty and its long-term effects.

METHODS

This paper analyses empirical data obtained from the qualitative study within the project *Everyday life and life course of old people living in poverty*, which focuses on the intertwining of micro and macro structures, the relationship between the private and public spheres and the study of the impact of this complexity on poverty among old people.² 33 retrospective semi-structured in-depth interviews were conducted between October 2023 and April 2024 with old people (over 65 years old) living in poverty in Slovenia. The interviews were conducted by several researchers and usually took place in the respondents' homes. Sometimes respondents did not feel comfortable inviting researchers to their homes, mostly expressing concerns about the lack of space. In these cases, interviews were conducted in another location, such as social service offices or other public spaces that allowed for sufficient intimacy. When determining the location for the interviews, the researchers adapted to the wishes of the respondents.

The length of the interviews varied greatly, with some respondents requiring only one interview and others two. Many interviews were emotionally intense and challenging for both sides, but the majority of interviewees were happy to participate and thanked the interviewer at the end of the interview.

The questionnaire was based on the life course approach and the everyday life approach. In the life course approach, we were interested in why the respondents were poor and therefore examined the fundamental trajectories in life courses (and their interconnectedness), namely childhood and educational trajectories, employment trajectories, family/partner trajectories and health trajectories. Using the everyday life approach, we examined respondents' current daily life to identify how people cope with poverty, and we were interested in their daily habits, money spending, saving strategies, eating habits, social networks and well-being.

The interviews were coded by two researchers with MaxQDA software, using a mixture of deductive approach (following the structure of the interview instrument, based on the life course and everyday life approaches) and inductive approach, where both coders identified new, emergent codes not predicted by the theoretical framework. Ten interviews were double coded by both coders, who discussed and coordinated a final coding scheme. The remaining interviews were coded individually by one of the coders according to the coordinated coding scheme. MaxQDA software was used to

process the extensive and complex empirical data more accurately and efficiently and to enable efficient collaboration between the coders.

FINDINGS

The six interrelated life course themes that we will use to analyse the empirical data form the conceptual framework for life course research. The first four themes come from the seminal work of Glen H. Elder (1974), who analysed data from pioneering longitudinal studies of children conducted at the University of California at Berkeley. He studied the lives of a sample of middle-class children born in the 1920s and a sample of working-class children born in the late 1920s and early 1930s. His study showed the enormous impact of the Great Depression in the 1930s on the individual and family lives of the respondents, namely that economic hardship during the Great Depression had a significant, long-term impact on the children, although this varied according to age, gender and socio-economic status. The latter two themes were introduced following further research (Elder, 1998; Elder & Giele, 2009). By applying a deductive approach to the analysis of the empirical data using life course themes, we aim to test whether the existing theoretical framework for empirical data on poverty can be applied to the collected empirical data on poverty in Slovenia, where the life course approach has not yet been applied so extensively, as well as to illustrate the complexity of the life course approach and its potential in analysing different aspects of poverty. Each life course theme has its own explanatory power in a more constructed framework, but looking at them together could provide the most valuable insights. The detailed and more complex analysis of each theme is beyond the scope of this paper, but we want to make a proposal for future analysis of the existing empirical data and suggest possible directions for future research on poverty.

The empirical data is very rich and complex, the quotes have been selected to shed light on each theme, but there are many more cases and quotes in the collected material that had to be omitted due to the limited length of the paper.

The interplay of human lives and historical time (historical and social context)

This theme emphasizes how the individual life trajectories is shaped by historical and social conditions. For people living in poverty, understanding the broader economic, political and cultural contexts that have influenced their experiences adds depth to the analysis,

² The empirical data supporting this study are securely stored by the project team and are available from the corresponding author upon reasonable request.

as it situates personal struggles in systemic patterns rather than attributing them solely to individual failings. The interviews revealed how major social and political events (e.g. war, political changes and transitions, economic recessions) affected opportunities, social mobility and access to resources for the respondents and their families.

We went into the forest, we went with carts, carrying goods. Father loaded us up and brought a bit of food – potatoes, beans... – whatever we had, we loaded it onto those carts, along with the children, as we were still small – quiet, quiet! – and we sneaked along to the ravine, where the water was, to go into the forest. And we went, we found a valley. It was a beautiful valley, and there we unpacked. We had a big tarp for the rain, and father made us a shelter (a roof, so to speak) like a house, and we filled it with dry leaves for the children to sleep on. And mother had this little baby boy, just a few months old... I carried the bottle and the pacifier. My younger brother led a goat, because mother didn't have enough milk to feed the baby... Do you see now? Now there are all these vitamins... but back then, we made do with what we had. And we were even healthier than people are now! (Luiza, F, 90)

The above quotation illustrates the enormous impact of war on the respondents and the well-being of their families. It refers to the basic lack of all resources, such as housing, food, even baby food, while questioning today's living standards and requirements by contrasting absolute and relative poverty. It also points to the very limited options people have in difficult political situations.

Oh! My ID card had expired. So, I went to a [city] and I said I wanted to sort out my ID... The person at the counter says, 'You'll need to go to the office in the back!' I go there, hand over the expired ID, she looks at it... 'You're one of the Erased! You were born in Croatia!' 'Yes!' I said, 'I was, but I was only in Croatia for two days.' (Zdenko, M, 72)

The above quote illustrates the special situation that arose after Slovenia gained political independence, when the Ministry of the Interior unlawfully removed more than 25,000 Slovenian residents from the register of permanent residents on February 26, 1992. This deprived them of their legal status and the corresponding economic, health and social rights. They lost their health insurance, which led to health problems, and were unable to continue their

education. This political act was an important social transition – a turning point – in the life courses of the erased, leading directly to poverty.

That's because I did a course to become a tai chi teacher, and parents started calling and writing to me, saying they were old, and I should come live with them. And also, at that time... it was Bush, and then nine-eleven happened [the 9/11 attack on the World Trade Center in New York]. And all of a sudden, all Americans... as soon as they even suspected you were a foreigner!!! Oooooo, a foreigner!!! Before that, when they heard my accent, they would all say, 'What a beautiful accent you have, where are you from?' You know!?! And then I thought to myself, 'Screw you – I'm going back to Europe! Like I have to live here!!!' (Peter, M, 73)

The above quote is another example of a politically induced turning point that significantly impacted the lives of millions of people in the US and around the world. It created hatred, doubt, fear and stigmatisation and forced thousands of people to change their everyday lives as well as the transitions and direction of their lives by overriding the opportunities they had before the event.

The “timing” of lives

The timing of certain life events in different life trajectories can have a significant impact on an individual's life chances and outcomes. This topic helps us analyse how the sequence and timing of events interact with poverty to shape people's life courses differently depending on their life stage. Early adversity such as dropping out of school or early parenthood can lead to cumulative disadvantage, highlighting the importance of timely interventions.

Yes, I went to Ljubljana and enrolled in languages at the Faculty of Arts, but... [pause] I didn't get further than the second year because I gave birth and then I quit my studies and started working. ... I probably felt grown-up too early. I moved out on my own very early, and I had to be an adult because of my daughter and everything. I think I managed it pretty well... as a single mom, I think. (Ida, F, 68)

The first quote illustrates how early parenthood can limit opportunities for education and work, especially among the most disadvantaged populations who lack the economic and social capital that would help them mitigate the negative aspects of the early transition to parenthood.

But then I quit [school], I mean, because I had paresis facialis [facial nerve paralysis], so I had to stop. I repeated the year, but it happened again, so that was it... I almost finished trade school, but then I got a job because I was abroad, and there was demand. I struggled a bit while working, but I wasn't really cut out for that... [laughs]. (Dragica, F, 73)

The above quote again illustrates the problem and consequences of the wrong timing of certain events in our lives and also the spillover of problems into other stages of life trajectories – what occurs in one trajectory influences our position and opportunities in other trajectories. In this case, a health problem (health trajectory) had a direct impact on the educational trajectory in which the respondent was forced to drop out of school.

When did you start drinking? How old were you?

Samo: About 17. But it was just drinking, we'd go to one fair, then another, have a few drinks... But the thing is, because of two head injuries I had, my system started breaking down. So even with a small amount of alcohol, I'd experience memory loss and aggression. (Samo, M, 72)

The above quote shows the profound effects of past life problems on people's life. Teenage alcohol addition of the respondent was no coincidence but was facilitated by the difficult situation in his parents' home at a young age, which later had a significant impact on the lives of his own family members and his own.

Linked lives

This theme highlights the interconnectedness of individuals within families and communities. Analysing the data through this lens shows how poverty affects not only the individual, but also the lives of family members. In the context of poverty, it is also important to look at the social networks, social capital and family support that provide emotional and material support – or exacerbate vulnerability.

At the hospital, I had this boss who made it impossible for me to relax and work. I just couldn't relax because she was always watching me. And then there were those women who were always tattling on me and talking, saying I was lazy, that there was nothing good about me, that I needed to work harder. It was so bad, so hard, that she drove me into a deep depression. At home, I had all sorts of problems – my father drank, then I had a husband who was a disaster, no need to even talk about

it, always drunk and everything else. I'd rather not say, but just briefly, it's no wonder all this brought me to where I was. But it's good I held on as long as I did, because I barely made it, as they say. I finally went to get treated for depression [in two psychiatric hospitals]. Thank God, I'm happy with everything. They fixed me up to be who I am today. (Nadja, F, 70)

The above quote illustrates the fundamental impact of the lack of (emotional) family support and difficult relationships in the work situation on the respondents' health trajectory. Alcohol and violence in the family affected our respondent's emotional stability and sense of direction and meaning in life, coupled with a hostile work environment that served as a triggering moment in which psychiatric treatment and withdrawal provided an environment in which Nadja found new support for her identity. Social and medical professionals also had a positive impact on her work situation by intervening at the management level of the employer. Today she is poor, but a very happy person who is grateful for supportive relationships and the help of medical and social professionals.

She, to put it simply, stopped taking contraception and got pregnant. And I explained it clearly. I said: 'Look, don't think I don't care!' I even went to the hospital to talk. I explained clearly, I said: 'I have two daughters, I can handle this, I mean, everything, but I'm not ready for a third. I'm... I'm really sorry!' And she told me, I'll say, almost too late. I told her plainly, I said: 'Look, I... no way. No way!' I said, 'I've been sleeping on couches my whole life. I have nothing from my family. I'm just a card, as they say. A bank statement!' That's how it was. (Samo, M, 72)

The above quote vividly illustrates how closely the lives of family members are interlinked. Their decisions, transitions and life events have a significant impact on the lives of those close to them and often require proactive behaviour to ensure the ability to influence our own lives. It also provides insight into managing the difficult emotional balance in less connected families.

Well, then this woman, near the hill where there was a store – I don't know if it's still there, I think it is – she took me in. She said, 'You know what? I can see what it's like for you at home. I have a room since my daughter moved out. Come live with us, and you won't have to pay anything. Maybe you can help clean from time to time.' (Marija, F, 70)

This quote shows the importance of social networks; in this case, the neighbour of our respondent

who was abandoned by her family (father), provided a home. This life event prevented the respondent from becoming homeless in her late teens.

For health reasons, we couldn't come to an agreement because of the radiation treatments and such... So, I looked elsewhere, and I ended up finding something there [in a factory]. Again, it was through my parents, connections, and acquaintances, because otherwise, you can't get anywhere. (Dragica, F, 73)

The above quote points to the well-documented importance of social capital – the so-called connections and acquaintances – as access to employment opportunities. But more importantly, it is a clear reminder of the barriers faced by the most disadvantaged people without social capital.

Human agency

At the heart of this theme is the question of how the individual can act within given structural and systemic constraints. In relation to poverty, it allows researchers to examine how people navigate poverty, make decisions and adapt to their circumstances, even when choices are very limited.

A social worker [delete for the purpose of anonymization], placed us directly into an institution [the children were taken from their parents]. That's how it was back then, you know, in those times. ... Then I wanted to enrol in a school in for metalworking. But then the school said it wasn't possible and all that. They told me, 'You have a special school completed; you need to complete a few more grades in evening classes.' I said, 'That's not going to work.' So, I went abroad. (Franko, M, 66)

The above quote comes from an interview with a respondent, who (along with his siblings) was removed from his family by social services at a very early age and was placed in various institutions during his childhood and adolescence. According to the respondent, it was common at the time for children in such institutions to be placed in special school programs simply because of their social situation and regardless of their intellectual abilities. In this case, all siblings were placed in special schools, which prevented them from pursuing mainstream education. The respondent spent his youth in constant resilience and opposition to the pattern prescribed and predicted at will by the state and its social services. He demonstrated resilience and creativity in dealing with the very scarce resources and limited opportunities to lead a life outside the normative and socially expected framework. Today, although

he is poor (he collects and sells copper and iron to supplement his meagre government income), he is a respected member of his neighbourhood who is also recognized as a special person by social services. Nevertheless, his story also shows how systemic barriers (attending a special school due to his poor social situation) limit his ability to act and lead to suboptimal outcomes in life.

First of all, when we closed the restaurant, it was a huge shock for me... I forgot to tell you – let me share this, I'll hide nothing! – I attempted suicide. It was terrible for me because there were so many unpaid bills left behind. ... I trusted her (my partner), she was managing it, but then a hole opened up. And they took me to [a psychiatric hospital], and when I started to recover, I went to the library and spent days and days reading. And there, I got this impulse, a mental push: 'Slavko, let's move forward!' And I came out like a new man, full of energy. (Slavko, M, 76)

This quote is another example of human agency in difficult situations. The breakdown of his mental health gave him the opportunity to find himself again and also to overcome the obstacles in other areas of his life, such as employment and family.

Diversity in life courses

This theme recognizes that the life course varies between different social groups and is shaped by factors such as gender, ethnicity, class and cultural background. At the same time, it recognizes that no two life trajectories are identical, even for individuals facing very similar social conditions and contexts. It helps us to avoid oversimplification and recognizes the heterogeneity of experiences within poverty.

There at the institution, if we kids did something wrong, the manager would beat us with a belt. ... And then, I don't know, I started running away from the institution with others, you know, the apprentices or whatever you'd call them. And we slowly learned how to steal and so on. We'd steal from some weekend houses to get food and things like that. (Franko, M, 66)

This quote illustrates the very difference in life course opportunities for different social groups, which are not strictly linked to classic socio-demographic factors such as gender or ethnicity.

Early life disadvantages, which manifest themselves in the loss of a family environment and upbringing in institutions, where they are confronted with violence and a lack of parental love

and support, among other things, multiply over the course of their lives and significantly reduce their life chances.

I came home at half past 10 in the evening instead of at 10:10 or 10:15 [because of an accident involving a train]. ... He (my father) grabbed a pan – mother had just made him dinner, eggs and such – and threw it at me. I got burned all over. He said, 'Girl, where were you? Whoring around? You've got no business here.' He locked me out. I was 17 at the time. ... Right? 'Go to work if you can't handle school.' I said I'd always been a good student until all this crap started. I got fours and fives (good grades), except maybe in chemistry and physics, which I wasn't good at. But everything else was fours and fives. I played chess, was in championships, competing everywhere. But when it came time for me to leave Slovenia to compete, you wouldn't let me. 'A woman isn't going to travel around.' Yeah, championships, I was always among the top. Art class – 'That's nonsense; you're not going to earn your bread from that.' Everything I liked, they crushed me. (Marija, F, 70)

This quote illustrates in a vivid and meaningful way that inequality and poverty are intertwined. Ethnicity, poverty, parental violence and gender all contribute to poor life choices, a very unfavourable and unsupportive home environment and deprive a very good and ambitious student of educational opportunities.

Developmental risk and protection: Cumulative Advantage/Disadvantage

This theme examines how risk factors (e.g. experience of violence, poverty) and protective factors (e.g. supportive relationships, educational opportunities) influence life circumstances. It also examines how disadvantages multiply over the course of a lifetime, making it increasingly difficult to escape poverty and an unfavourable situation, especially if it starts early in life. The findings from this topic will enable an assessment of which interventions might be more successful in mitigating the impact of poverty, and at what period or transitions in the life course.

Hmm, in fourth grade, everything was fine until we had to write an essay titled 'My Parents.' Everyone thought, because of my last name that my father was an officer and my mother was an officer's wife. But when we wrote 'My Parents,' the teacher was so pleased with my free essay that she had me read it aloud to the

class. That was the biggest mistake. Then it started: 'Get out, Bosnians!' Kids threw sand at me; you know the kind that sticks to your hair? They burned my hair; I had long hair down to here. It was awful. ... Well, then this guy kept bullying me, and the teacher told me, 'You know what, Marija? You're going to end up on the street.' She said, 'You know what you should do? Just get all ones (lowest grades), let them expel you from school, and then go to evening school instead.' This was my Slovene teacher. (Marija, F, 70)

This is the quote from Marija, who was already presented above. The intersectionality of her status, including her ethnicity and gender, has significantly affected her life chances. As she was poor and not protected by her family and school environment, the teacher thought it would be best for her if she dropped out of school, even though she was a talented and promising student. Marija followed her advice. This story, this sequence of events, is considered unimaginable, at least for Slovenian pupils from the middle and upper classes. Early disadvantages in life quickly accumulate if they are not cushioned by the social and institutional framework.

It's hard when you grow up in such an area, in such poverty... you have no idea... with uneducated parents who were illiterate. ... They (my parents) insisted that I stay home. I wanted to become a teacher. I was determined to enrol in a teacher training school. But they said – my father said – 'No chance! I don't have the money; I can't finance you... that's out of the question! Don't even think about it.' For those reasons. That was my life's dream, to be a teacher. Something about it really drew me in – teaching, you know? Because there was also a shortage of teachers, and I wanted to work here, in the village. But of course, I didn't finish it, or rather, I didn't even enrol. I gave up on that dream. So, I stayed home and, over time... after primary school... because I started school two years late, I finished school at the age of 18 – primary school. And then, when I finished school, I realized I had no chance to continue my education (a faint smile). (Enis, M, 73)

This quotation also underlines the consequences of disadvantage in early life. The poor and illiterate parents had no means (or perhaps no knowledge or motivation) to support the respondent's educational and professional aspirations. His low educational attainment was written into his cradle.

DISCUSSION AND CONCLUSION

Poverty is not a static state, but a process that is characterised by important transitions and turning points in the life course. The life course approach to poverty offers a more comprehensive, differentiated understanding of how poverty develops over the course of a lifetime. It goes beyond static measures of poverty and examines the crucial role of life transitions, cumulative disadvantage and the interconnectedness of an individual's life with broader social and political circumstances.

The life course approach emphasises the accumulation of risk over time, particularly for individuals who experience multiple forms of disadvantage. Poverty in early childhood is a strong predictor of future poverty as it affects educational attainment, health and employment prospects (Duncan & Brooks-Gunn, 1997). For example, children growing up in low-income households are at higher risk of poor health, which in turn limits their ability to perform well in school and find a well-paying job in adulthood (Case et al., 2002). These effects are not isolated; they interact and reinforce each other, creating a cycle of poverty that spans generations (Elder, 1998).

This article aimed to demonstrate the profound ways in which poverty is linked to historical, social and structural factors and shapes the individual life trajectories. The findings analysed in the context of key life course themes highlight several important insights that are of analytical value and offer potential for targeted interventions.

With regard to the *interplay of human lives and historical contexts*, it becomes clear how historical and political contexts (e.g. wars, economic changes or political discrimination) fundamentally influence the opportunities of individuals and often exacerbate poverty. Systemic decisions, such as the deletion of the legal status of residents in Slovenia, illustrate how political actions create turning points in the individual life course that can perpetuate poverty and inequality. These findings underscore the need to understand and address the systemic causes of poverty and to pay attention to how the “zeitgeist” shapes the context of poverty and constrains individuals in their attempts to escape poverty. This theme also reminds us not to succumb to individualistic approaches to poverty, such as lifestyle change.

In the context of *timing of lives*, we can recognise the crucial importance of the timing of when certain life events happen to us, as we have different abilities, opportunities and means at different stages of life to cope and compensate for the “mistimed” events in particular. In this context, early life adversities in particular, such as childhood poverty, teenage parenthood, educational dropouts or health problems, have long-term and

cumulative effects on the life trajectories. The data illustrates how the timing and sequence of life events, particularly in early developmental stages (but not only there), can lock people into cycles of poverty. Timely interventions that target families, children and young people in particular and continuously tackle poverty, for example through equal access to education, health services and social support for all, could more effectively mitigate cumulative disadvantage in later life.

In the context of *linked lives*, the findings clearly show that poverty is not an isolated phenomenon but impacts on whole families and sometimes wider communities. Social networks and family support – or lack thereof – play a central role in influencing the life trajectories. Therefore, an individual is rarely the best choice as a target for various interventions; instead, families, communities or better still society are the best targets for poverty reduction strategies, as poverty has many faces and many victims. It would be productive to view poverty as a societal rather than an individual problem, not only in terms of the consequences of poverty, but also in terms of its causes. Escaping the vicious circle of poverty should not be left to the individual. This is most evident in the case of child poverty.

The context of *human agency* illustrates that individuals often display remarkable resilience and agency in dealing with poverty despite systemic limitations. Stories of resistance to structural barriers (e.g. poor education systems or stigmatizing policies) illustrate the capacity for self-determination even in adverse circumstances. Policies should empower individuals by providing tailored support that considers their particular circumstances and promotes autonomy over their lives. Nonetheless, poverty should be addressed systematically and not left to the personal ingenuity and creativity of the individual, which is embedded in the very structure of neoliberal capitalism.

The diversity of life courses shows that life trajectories are very different due to intersecting factors such as gender, ethnicity and disadvantage early in life. Intersectionality exacerbates the challenges faced by marginalized groups, as demonstrated by the combined effects of violence, poverty and lack of educational opportunities. Targeted interventions must address these intersecting factors, with a focus on inclusive interventions that address the specific vulnerabilities of underrepresented or historically marginalized groups.

Cumulative (dis)advantage illustrates the long-lasting consequences and influences of (early) disadvantage in life, such as experiences of violence or lack of educational support, which multiply over time. Protective factors such as supportive relationships or educational opportunities are crucial to

breaking the cycle of poverty. Investment in early childhood development, education and family support systems are crucial to mitigate the compounding effects of poverty over the life course.

These findings highlight the complexity of poverty and the systemic nature of its perpetuation. They provide a nuanced understanding of how poverty unfolds over the life course and emphasize structural factors rather than individual vulnerabilities. The study combines quantitative trends with qualitative findings and offers a multidimensional perspective that is essential for the design of effective social policy. It also highlights the need to address poverty at both an individual and systemic level.

In addition, this approach helps policy makers to design more effective interventions by targeting key moments in life when the risk of poverty increases and by addressing the long-term structural causes of poverty. Policies that target critical life stages – such as early childhood interventions, support for stable employment and family support – are crucial to prevent the accumulation of disadvantage that leads to persistent poverty. The life course approach offers a dynamic framework for analysing poverty as it unfolds over time and underscores the need for longitudinal strategies that address the causes of poverty at key turning points in life.

In terms of evaluating the theoretical model of life course issues against the empirical data on poverty among older people in Slovenia, we can conclude that it provides an invaluable framework that offers a roadmap for how to think about, analyse and tackle poverty. It offers rich and insightful knowledge about the interplay of structural and individual factors that cause and maintain poverty over the course of a person's life. It also allows us to account for the complexity and variability of what it means to live in poverty and therefore opens many doors to poverty

prevention and/or reduction, particularly those that prevent the cumulative effects of poverty, as opposed to single interventions with more short-term or immediate effects.

The aim of this paper was to demonstrate the usefulness of the life course approach to poverty reduction. Each of the life course themes presented can be analysed individually and offers specific analytical value. It is undoubtedly most thorough and insightful to consider poverty in the context of all the themes, but this is a complex challenge. The framework also offers the opportunity to analyse poverty from the perspective of each of the key life trajectories (education, employment, family and health trajectories) and how these interact with each other (e.g. how dropping out of school – i.e. the education trajectory – affects employment opportunities (employment trajectory), health, i.e. reduced mental wellbeing (health trajectory), or the future prospects of the dropout's children (family trajectory)). Such analysis can provide invaluable insight into the spillover effects of a particular life event or disadvantage and in turn provide the opportunity to identify more targeted systemic interventions.

A further step in future analysis of the collected material would be to identify the key life transitions and turning points where social and institutional interventions would be most influential in enabling poor people to move out of poverty. According to the above analysis, even if we do not specifically aim to identify these, we can at least identify the following key crossroads in the individual life course: childhood education, transition from school to work, starting a family, health transitions. Interventions at these transitions, such as educational support, labour market policies, health services and social safety nets, can have a profound impact on preventing or mitigating poverty over the life course.

REVŠČINA V SLOVENIJI SKOZI KLJUČNE TEME PRISTOPA ŽIVLJENJSKEGA POTEKA

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POVZETEK

Članek predstavlja rezultate kvalitativnega dela raziskave o življenjskih potekih ter vsakdanjem življenju revnih starih ljudi v Sloveniji, ki so živeli in delali v socializmu in kapitalizmu. Raziskava je bila izvedena v obdobju med oktobrom 2023 in aprilom 2024, izvedenih je bilo 33 poglobljenih biografskih intervjujev s posamezniki in posameznicami, starejšimi od 65 let, ki živijo v revščini. Zanimali so nas kumulativni učinki revščine skozi različna življenjska obdobja, izhajali pa smo iz teze o razvojnem tveganju in zaščiti: izkušnje posameznika v enem življenjskem obdobju oz. prehodu vplivajo na vse njegove poznejše prehode in obdobja, ob tem pa bodo delovale bodisi varovalno na posameznikovo življenjsko pot (dejavniki zaščite) ali pa jo ogrozile oz. motile (dejavniki tveganja). Revščine ne razumemo kot statično stanje, temveč kot proces, ki ga oblikujejo ključni prehodi in prelomnice v življenju. Analiza revščine skozi pristop življenjskega poteka nam tako omogoča kompleksnejše in bolj niansirano razumevanje razvoja revščine skozi vse življenje. Rezultati kažejo, da se revščina tesno prepleta z zgodovinskimi, družbenimi in strukturnimi dejavniki, ki oblikujejo življenjske poti posameznikov ter da se življenjske poti zelo razlikujejo zaradi prepletajočih se dejavnikov, kot so spol, etnična pripadnost in primanjkljaji v zgodnjem življenju. Analiza je pokazala na pomembnost časovne dimenzije v smislu, kdaj se določeni življenjski dogodki zgodijo ter da revščina ni individualen pojav, temveč vpliva na celotno družino in včasih tudi na širše skupnosti. Vendar pa rezultati tudi kažejo, da kljub sistemskim omejitvam posamezniki pogosto izkazujejo izjemno odpornost in voljo pri premagovanju revščine.

Ključne besede: revščina, stari ljudje, življenjski potek, prehod, povezana življenja, kumulativna revščina, družbeni in zgodovinski kontekst

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INTEGRATION OF PEASANTS INTO THE SOCIAL SECURITY SYSTEMS IN SOCIALIST SLOVENIA

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ABSTRACT

The present contribution examines the integration of peasants into the social security systems in the second half of the twentieth century. In the first part of the article, the historical context (ideological background, agricultural and social policies, structural changes) is presented, while the second part focuses on the long-term social position of agriculture and peasants. The third part examines the acute problems of agricultural poverty and systemic measures to improve the situation of the agricultural population, based on the example of health and pension insurance.

Keywords: economic and social policy, peasants, social security systems, socialism, Slovenia

L'INTEGRAZIONE DEI CONTADINI NEI SISTEMI DI SICUREZZA SOCIALE NELLA SLOVENIA SOCIALISTA

SINTESI

Il presente contributo esamina l'integrazione dei contadini nei sistemi di sicurezza sociale nella seconda metà del XX secolo. Nella prima parte dell'articolo viene presentato il contesto storico (sfondo ideologico, politiche agricole e sociali, cambiamenti strutturali), mentre la seconda parte si concentra sulla posizione sociale assunta dall'agricoltura e dai contadini nel lungo periodo. La terza parte analizza i problemi acuti della povertà agricola e le misure sistemiche per migliorare la situazione della popolazione agricola, basandosi sull'esempio dell'assicurazione sanitaria e pensionistica.

Parole chiave: politica economica e sociale, contadini, sistemi di sicurezza sociale, socialismo, Slovenia

INTRODUCTION

To understand the social position of peasants and agricultural poverty in socialist Slovenia, it is necessary to outline, at least roughly, their social position before World War II. The social position of the agricultural and rural population was the focus of considerable public attention. When the communists rose to power after World War II, they introduced measures to tackle the prevailing poverty in rural areas. In general, economic and social policies were focused on improving the social position of the classes disadvantaged before World War II, i.e. during the Great Depression of the 1930s, which had profoundly affected the society and the political actors. The position of some social groups had improved at the expense of the social humiliation of other social classes, such as the bourgeoisie or private peasants. The policies introduced after the World War II changed the society. In the middle of the 1960s, it thus became necessary to alter the implementation and orientation of the prevailing development concepts, which had to be adapted to the new economic and social structure emerging with the implementation of communist social and economic policies. At that time, private peasants were gradually included in the various forms of insurance, slowly bringing them on an equal footing with the employees in the so-called social sector. This process was neither swift nor free of ideological controversies. In fact, ideological moments persisted until the beginning of the transition at the turn of the 1990s. Hence, the article is divided into three parts. In the first part, the agricultural situation before World War II is presented. The second part focuses on the period of socialist agricultural policy and the role of private agriculture. The third part is dedicated to the integration of private peasants into the social security systems and thus society.

THE SITUATION BEFORE WORLD WAR II

Before World War II, peasants represented the most numerous segment of society. Slovenia was predominantly agrarian, with agriculture still contributing half of the national income. Approximately 60% of the population depended at least partly on agricultural income (Erjavec, 1928, 12). As an economic and social group, peasants were essential for social stability. Land ownership fragmentation represented a fundamental fact that determined the results of agricultural work, the structure of the agricultural economy, and the living standard in the countryside. On the one hand, a large number of peasants possessed tiny plots of land, while on the other hand, very few owned extensive areas. In this regard, it should be emphasised that it is impossible to speak of large estates with a lot of cultivable land, as the large farms typically included extensive forest areas. In such cases, the economisation of forest potentials represented the main activity. The 1931 farm census revealed that one third of farms were smaller than two hectares, while a

quarter of them measured up to five hectares. The distribution of plots also represented a considerable problem for suitable cultivation of fields. Most peasants did not own a homogenous piece of land but rather small plots at different locations. According to the census, there were 1,882,245 land parcels in the Yugoslav part of Slovenia, significantly exceeding the number of inhabitants. The forest ownership structure was equally fragmented.

According to public opinion, land and forests represented indispensable elements of survival in the countryside. Aspirations for a political intervention that would ensure a more balanced land ownership structure were constantly present, especially to secure sufficient areas of land and forests for small and tiny farms. In the prevailing opinion, the ideal farm consisted of approximately five hectares with the production potential ensuring the survival of an agricultural family. Due to the political pressure after World War I, an agrarian reform was introduced, but it failed to fulfil the public and political expectations.

Rural overpopulation represented an acute economic and social problem in the countryside, as the population growth outpaced the increase in agricultural productivity. Employment opportunities outside agriculture were also limited, while travel abroad was difficult or impossible between the two wars. Farm profitability was low. The differences between the individual types of farms were significant. Profitability only started increasing in the case of farms measuring almost ten hectares or more. Regarding the living costs, the agricultural production of small farms (measuring up to two hectares) only sufficed for a single person, while farms between two and five hectares were enough for 3.32 persons, on average. Only farms that came close to ten hectares or more could provide for more people than the average agricultural household (Uratnik, 1938, 61). The estimated average size of an agricultural family at the time was somewhat more than five members (Maister, 1938, 94). Except for bare survival (and even this barely), small farms did not ensure anything else. Small farms (up to two hectares) did not even suffice for the basic existential needs of all the family members. To meet their entire families' needs for food, peasants had to look for additional land. The information regarding the leasing of arable land shows that in the case of small farms measuring up to five hectares, the percentage of rented areas was high. In the size category up to a single hectare, leased land represented 27%, while in the category between one and two hectares, it amounted to 17%. Even in the case of farms measuring up to five hectares, the percentage of leased land was 10%. Only in the case of larger farms was this percentage statistically insignificant (Uratnik, 1938, 53).

Anton Pevec (1924, 5) presented the dilemmas related to agriculture without embellishments. He wrote: "In Slovenia, it will be necessary to either increase the agricultural production or reduce the size of the agricultural population by half." He believed that this would happen on its own but that such a result should be prevented with

the agricultural policy measures that would ensure the restructuring aimed at more efficient production and increased size of farms. He was convinced that small farms did not meet the conditions for long-term economic survival. Meanwhile, another contemporary of Pevec wrote that small peasants, in particular those who owned up to two hectares, were already coming close to the position of wage workers due to their non-agricultural activities (Möderndorfer, 1938, 155).

It was obvious that small peasants urgently required other sources of income to cover the investments into social and economic modernisation. Even with leased land, agriculture as the primary activity did not suffice. Half of all the farms whose majority of income originated from non-agricultural sectors were smaller than a single hectare. These were followed by farms measuring up to two hectares, and then by those between two and five hectares. Of the total number of farms whose majority of income originated outside agriculture, as much as 84% did not measure more than five hectares of land (Uratnik, 1938, 54). Peasants and rural population also had to engage in non-agricultural activities to survive. They developed various crafts and resorted to retail trade. According to this model, farms served to provide basic food, while other activities (hired work, crafts, migration) provided the means for other life necessities.

Field workers represented a pressing issue. Wage labour was by far the most important category for acquiring additional income at small farms. On the one hand, farms larger than ten hectares already required additional workforce during the peak of the season, as family members were unable to do everything on their own. On the other hand, however, smaller farms, in particular, had an excess of workforce at their disposal due to the problem of agrarian overpopulation. Regarding employment in agriculture and forestry, we should distinguish between two categories. The first was permanent employment (farmhands, maids), where people would perform all of the agricultural, forestry, or household jobs. As a rule, the permanently employed individuals were not married. They belonged to the agricultural households and lived at the farms where they worked. They were paid in kind – with food, clothes, and accommodation. Only occasionally would they receive modest monetary payments. Their position depended on the economic power of the farms where they were employed. On medium-sized and smaller farms, the permanently employed workers shared the living standard of the farm owners. The only difference was their accommodation: the lodging assigned to the employees was exceedingly modest, and the habit of simply sleeping in stables was widespread. The living and working conditions were somewhat better in the case of larger, more profitable farms (Vodopivec, 1940, 227).

The status of farmhands and maids was regulated only informally, with oral contracts in line with the principles of the natural (people's) law. In the case of old age, exhaustion, or illness, such workers only had

the right to minimal care and modest accommodation as associated family members but were otherwise completely unprotected. In some cases, the farm owners and the municipality shared the care for obsolete workers. However, this did not sufficiently protect the permanently employed agricultural workers. The obligations of the owners were merely moral rather than stemming from the workers' social security. Farm owners could dismiss their workers without any reasons, explanations, or sanctions. The owners' moral reputation might have suffered in the community, which, however, acknowledged their right to dismiss workers – and they would regularly exercise it. This was the main problem of many farmhands, who became the burden of their municipalities and were forced to live in poverty as beggars once they could no longer work. Due to such circumstances, conflicts and doubts abounded in the agrarian communities. The problem was far-reaching, exceeding the limits of the people's law and moral obligations. In the 1930s, demands for precise regulation of the position of agricultural workers were frequent but remained at the level of ideas.

The second type of employment was not permanent but temporary, while the seasonal nature of work called for a larger number of workers. Payments were almost exclusively monetary. Such workers, paid by workdays (day labourers), were mostly hired by the owners of larger farms – i.e. the ones boasting more than ten hectares of land. According to the calculations, at the farms smaller than five hectares, the hours spent by the peasants and their families working at their homesteads represented only 40% of their potential working time. Hired work was thus crucial for a significant percentage of the rural population. According to the research conducted by Filip Uratnik in 1938, towards the end of the 1930s, as much as a third of the rural population gained additional earnings by working at other farms. Due to the predominantly low profitability in agriculture, the wages of hired workers were correspondingly modest. Filip Uratnik estimated that the average daily wage of hired workers amounted to half of the daily earnings of industrial workers, which only covered the bare existential minimum (Uratnik, 1938, 5–12, 62–76).

AGRICULTURAL POLICY STAGES AFTER WORLD WAR II

According to the social consensus before World War II, the agricultural structure needed to change. The average size of farms was to be increased, while peasants should be steered towards entrepreneurship. Simultaneously, industrialisation should reduce the burden of agrarian overpopulation, freeing up a part of the revenue for the much-needed investments in technology. However, there was no consensus on how to bring about the necessary changes in social development planning and, in this context, rural poverty alleviation. Before World War II, society did not generally support the communist

vision of social and economic development. Almost ten years after World War II, agricultural policy was based on the “Marxist interpretation” that peasants could not survive in the long term as small-scale producers due to the processes of concentration of land ownership and the monopolisation of production in the form of large-scale capitalist farms using mechanisation. The inevitability of the proletarianisation of peasants in the capitalist system is exactly what justified the principles of the communist agricultural policy in Slovenia (Yugoslavia). Following the Marxist tradition and the Soviet model, the Yugoslav ideologues of agricultural policy built upon the thesis that private agriculture (regardless of its size) constantly opened up the possibility of strengthening capitalist relationships in the countryside, which they saw as contrary to the aspirations of the communist economic system. The agricultural policy had a twofold objective: either the abolition of peasants as a distinct social stratum in the initial period, or its political, social, and economic confinement to very narrow production contexts later on.

The initial period encompasses the period from the agrarian reform in 1945 to the abandonment of collectivisation. During that time, the policy was aimed against peasants as individuals and as a social group. Under the concept of the centrally planned system, peasants were subject to strict control, while crop production and stocking with compulsory purchases were regulated in detail. The market was formally abolished and could only exist informally. Peasants were deprived of their economic subjectivity, while the existing system did not allow for economic incentives (Čepič, 1999, 176), which were to be replaced by ideological incentives.

In 1953, collectivisation was officially abandoned. The legislation was amended to allow peasants to leave agricultural cooperatives without punishment, triggering an avalanche of peasants leaving the cooperatives. After years of violence and alienation, it was crucial to appease peasants. The 1957 Resolution of the Federal Assembly, aimed at peasants, implied that in the future, the agricultural policy would be implemented without any violent interference in individual land ownership (Veselinov, 1987, 50).

In relation to peasants, a major step was taken by legitimising their economic interests. Private peasants were recognised as legitimate economic entities with their own economic and social interests. The economic relevance and potential of private farming were thus also recognised, paving the way for a different regulation of agricultural production relations. However, the fundamental focus remained intact, as agricultural production had to be based on a state-owned agricultural sector, which would act as the vehicle for technical transformation and increasing productivity. A reorganised and reformed cooperative sector would represent a complement and a mechanism for integrating workers into the so-called “socialist production relationships”. Simultaneously, measures were adopted to safeguard “socialist production relationships”

or prevent the “reproduction of capitalist relationships”. When collectivisation was abolished, the scope of the maximum land ownership was also changed. From 1953 onwards, peasants were only allowed to own ten hectares of land. Any excesses of this limit were nationalised and peasants were compensated according to the estimated land profitability (Veselinov, 1987, 32).

The recognition of the peasant’s economic interest had positive consequences, as production increased and peasants accepted cooperative participation. Interestingly, peasants who owned land holdings near the maximum allowed size were predominant in joining these forms of cooperation. In Slovenia, 44% of all peasants were involved in cooperatives, which was significantly more than at the Yugoslav level (25%). The economic potential of this cooperation was not negligible either, as private peasants, for example, accounted for one third of all wheat production and one quarter of potato production in Slovenia (Čepič, 1999, 187–188).

The abandonment of ideological rigidity in relation to private agriculture progressed along with the liberalisation of the socialist economic system. However, the system was designed to keep peasants within the socialist cooperative sector through economic and social measures. As of the mid-1960s, state-owned agricultural enterprises received intensive investments, increased their production and productivity, and, to a considerable extent, installed and modernised their technological equipment. The economic importance of private agriculture was generally declining. De-agrarianisation was an accompanying process, and the problem of agrarian overpopulation was gradually losing its relevance. Extensive migrations of rural populations, both to live in cities and work in industry and service sectors at home and abroad, reduced the social significance of the agricultural population.

In the political vocabulary, the class-oriented approach was receding, along with the fear of “wealthy” peasants. Gradually, the peasant’s status was equalised with that of other economic entities. In 1967, the last remaining restrictions on purchasing heavy machinery and other equipment needed for agricultural production were lifted, and peasants could buy state-of-the-art equipment freely. This facilitated the modernisation of private agriculture, allowing many peasants to adapt their previously close involvement in the “socialist cooperation” with the cooperative sector. They were allowed to enter the market independently and sell their products directly to end customers. This change raised the issue of maximum land ownership, as the ten-hectare limit had become an obstacle to the development of private agriculture. This is why the 1974 Constitution already provided for the possibility of land leases. The possibility of leasing land, which, in theory, was not limited in scope, definitely paved the way for more ambitious entrepreneurship in private farming – only within the limits of the existing communist system, of course. As in all other areas, the main restriction was the possibility of hiring labour, which

was limited to a few people. Agriculture as a whole also benefited from the correction of relative price ratios in favour of agriculture (Loncarevic, 1987). Simultaneously, the tax system was amended to make it more favourable for peasants. After the abandonment of collectivisation, where the above-average peasants tax burden was aimed at capturing accumulation, gradual changes made the tax system relatively favourable for private peasants. The progressive tax bases, determined in an arbitrary political manner, were replaced by a system of cadastral income taxation, with a deduction for the operating costs of production. After 1971, Slovenia switched to a system of taxing the peasant's real income.

The relevant items of economic discrimination against peasants also affected profitability and productivity. The profitability and productivity of the private agricultural sector in Slovenia (like elsewhere in Yugoslavia) regularly lagged behind the state agricultural sector, both because of the pricing policies and administrative restrictions on investments at private farms. The gap in the relative magnitude of growth in production and profitability kept widening, especially since the 1960s, to the detriment of private agriculture in the long term (Turk, 1996; Bojnec, 1991; Nishimizu & Page, 1982; Boyd, 1987; Hofler & Payne, 1993).

Once peasants were economically and socially re-integrated into society, and as the importance of private farming for the food balance was undeniably recognised, cooperative farming was revitalised. Based on a new conceptual framework, cooperative farming was supposed to enable the modernisation of private agriculture to better meet the agricultural policy objectives. Modernisation called for financial resources, which is why the development of cooperative credit and savings institutions began in 1969. In 1971, they merged into the Credit and Savings Institutions Association of Slovenia, making the loans more accessible for peasants. In 1972, the Peasants Associations Act followed, once again enabling the voluntary establishment of cooperatives based on the peasants' interests. In 1972, the Cooperative Association of Slovenia was established, undertaking an organised expansion of the cooperative network. The Association contributed to improving the peasant's economic situation, market regulation, crediting, and education, as well as encouraged the upgrading of the agricultural legislation. An agreement was reached on the state, banks, and savings banks providing loans to finance farm development and the agricultural sector. After 1975, the International Bank for Reconstruction and Development also participated in the reconstruction.

Within the cooperatives, agricultural promoters advised peasants on how to adapt to expand the marketable production. The first agricultural tractors with attachments, along with the first silos, modern facilities for indoor livestock farming, milking machines, and collection facilities were introduced, while pedigree breeding services proved to be very successful. The

extensive technological modernisation of farms began. Peasant mainly focused on cattle farming, producing meat and milk. New investments also rapidly boosted food production on farms, increased farm incomes, and improved the peasant's living standard. In the 1980s, collective insurance became widespread. A significant shift was made in the collective insurance for livestock, plantations, and crops, with 20% of all plantations and crops insured. Cooperatives were the main organisers of collective insurance (Avsec et al., 1997, 4–9).

MIXED FARMS

Economic incentives and the partial functioning of the market gradually encouraged the industriousness and entrepreneurship of peasants – within certain limits, but nonetheless. Ana Barbič's research has revealed that peasants quickly turned liberalisation to their advantage as soon as they were given the chance. They started working on their own account, rapidly expanding their range of activities and thus diversifying their income. The long-term agricultural management strategy, abruptly interrupted by collectivisation, was revived. According to Ana Barbič, all peasants activities were also directly or indirectly aimed at generating income. Of course, in accordance with the rhythm of farm work, wintertime was suitable for additional activities. Barbič also introduces a distinction between formal and informal agricultural activities. This category is more analytical, as it points out that it is difficult to draw a line between agriculture as a formal and informal activity in everyday life. For those members of agricultural families whose primary source of income is agriculture, it represents formal employment, while for those who earn most of their income with non-agricultural activities, it is informal (Barbič, 1990, 128–129). The distinction is relevant because historical experience also shows a division of labour within agricultural families, not only by gender but also by farm activities (Lazarević, 2018).

According to a survey of individual farm households in the 1980s, almost half (47.1%) of the households gained their income from two sources: agricultural activities and regular employment of members outside agriculture. Only 20% of farm households received income exclusively from agricultural activities. 12.5% had three sources of income – agriculture, regular employment, and agriculture-related activities. 6.6% combined income from agriculture and agriculture-related activities. However, 13.8% of the farms relied on combinations of very diverse activities in addition to farming, which are difficult to categorise (Barbič, 1990, 131).

From a historical perspective, these results are not surprising. They correspond to the conclusions of Filip Uratnik, who also examined sources of income in the period before World War II. His assessment is unequivocal: hired work was crucial for a significant percentage of the rural population. In 1938, only 40% of working time

was devoted to agricultural activities at farms not exceeding five hectares and even less at smaller ones. These peasants had to look for additional employment and thus a supplementary income outside agricultural activities (Uratnik, 1938, 5–12, 62–76). The pre-war and post-war socio-economic contexts shared the same characteristics, while only the employment sector was different. Before World War II, most peasants were employed in the agricultural sector (farmhands, maids, day labourers). Only some who lived in the vicinity of industrial centres also held jobs in the cities (Lazarević, 2014). After World War II, when private sector employment was banned, it was replaced by employment in the industry and service sectors. Like in the Western countries during that period, this represented a conscious income strategy of the agricultural population (Gasson, 1986; Robson et al., 1987).

Since most employment outside the farm household before World War II was in agriculture, the phenomenon was not as socially visible. After World War II, this changed, and the employment of farm household members outside of agricultural activities attracted the attention of the authorities and researchers. The structure of farm households and the countryside kept changing (Klemenčič, 1974; Klemenčič, 1968; Munton et al., 1989). When, in socialism, peasants also started working in factories, the question was how to name this group of the rural population. Terms such as *polkmet* (semi-peasant), *kmet-delavec* (peasant-worker), or *delavec-kmet* (worker-peasant) were used to describe the phenomenon. The expressions “semi-peasant” or “peasant-worker” stemmed from the Marxist logic of the transitory nature of such phenomena, leading to the inevitable proletarianisation of peasants. Later, as the authorities became more pragmatic, the term *mešana kmetija* (mixed farm or part-time farm) became established in the expert community, modelled after the term “part-time farming” in foreign literature. The meaning of the two terms is identical. The sources of income, i.e. the combination of income from agriculture and non-agricultural activities, represent the criterion for defining the status of mixed farms (Barbič, 1990, 16–29; Fuller, 1990).

A few clarifications are required to understand the broader context of the phenomenon of mixed farms. The revived long-term logic of the agricultural economy was nevertheless stifled by the political and economic measures of the socialist authorities. The nationalisation of land further contributed to the fragmentation of landholdings. Unsurprisingly, the smallholder structure represented a problem for the intensification of private farm production, along with an unfavourable tax system, the relative price level that was detrimental to agriculture, the modest buy-in prices of agricultural products, and the restrictions regarding the maximum farm size, the purchase of machinery, and the amount of investments in private agriculture. The social disadvantage of peasants, who were not entitled to health and pension insurance for a long time, also contributed to this. If they were

regularly employed, they gained all the social security rights. The state's intensive industrialisation policy was also not in favour of agriculture. This led to a drift from the countryside to the cities, and de-agrarianisation was a rapid process. Barbič argues that “the reliable and regular income and the guaranteed social security provided by regular employment at least partially deprived the agriculture of a large part of the agricultural population, who otherwise did not want to completely abandon farming” (Barbič, 1990, 128–129).

In the process of increasing the percentage of mixed farms, a social misunderstanding of the phenomenon emerged. It was not seen as a systemic feature of the agricultural economy, but as a sort of social and economic anomaly – perhaps not in those exact words, yet not very far in terms of implications. One of the studies focusing on the reputation of the agricultural profession in the second half of the twentieth century concluded that peasants were subject to considerable criticism as a distinct social and economic stratum. Based on almost half a century of public opinion polls, it was obvious that the agricultural profession was considered one of the least respectable in society. Another conclusion of the study – that mixed farms were supposed to be harmful – was also difficult to ignore. According to public opinion, these people, who combined income from regular employment and agriculture, were responsible for neglecting farmland and the traditional agricultural landscape. Simultaneously, they were also thought to be less effective in regular jobs due to exhaustion (Razpotnik Visković & Seručnik, 2013). Such a negative public attitude was also pointed out by Ana Barbič in the early 1990s, as she detected other “criticisms” of mixed farms while researching the reputation of peasants in society. It was believed that individuals from mixed farms had not acquired the work habits and values of the industrial society. Reportedly, they were frequently absent from work, especially during major farm works, and represented a greater burden for the health care system than others. Interestingly, these claims were not empirically confirmed facts but rather generally attributed characteristics. In fact, research revealed a different picture. The employees from mixed farms did not deviate in any way from the general conditions in the companies (Barbič, 1990, 16–19, 41). This might also be a reaction to the fact that mixed households tended to have above-average incomes (Rendla, 2022, 190–191) because they integrated incomes from agricultural and non-agricultural economic activities.

PEASANTS' SOCIAL SECURITY AND PENSIONS

Before World War II, the social situation of peasants was not regulated. Social security systems were based on dependent forms of work and tied to employment. As landowners and independent economic operators, peasants were not included in this category and were thus excluded from all insurance schemes, even after the Pension

Insurance Act of 1937. Regularly employed agricultural workers (farmhands, maids, vineyard workers) were no better off. Although the precariousness of their situation and the reality of the existing employment relationship were known facts, their situation was not regulated until World War II, despite many initiatives. The situation of peasants and agricultural workers depended on the so-called natural law and the solidarity within families and local communities.

In socialist Slovenia, the employment relationship remained a precondition for social security. Therefore, the state promoted the employment of the population and thus the right to social security services through economic policies. The policy of accelerated industrialisation and nationalisation of agriculture was intended to gradually abolish peasants as a separate social stratum. Most of them would find employment in non-agricultural activities, while others would become some sort of workers in state-owned (cooperative) agricultural enterprises, thus also attaining the right to social security services. The case of private peasants deviated from this principle. While the authorities tolerated them, they did not make their situation any easier, as they did nothing to regulate their social security. Thus, private peasants had two options: they could commit to cooperating closely with the socialist (social/cooperative) agricultural sector and therefore gain the right to inclusion in social security schemes; or, alternatively, a family member could become employed in the industry or service sector and thus qualify for the inclusion in the social security schemes. The agricultural population was certainly pragmatic, as the data on collaboration with the cooperative sector and the existence of a significant number of mixed farms reveal that these were conscious strategies to ensure social security. However, this solution was neither comprehensive nor systemic. Many family members and peasants who were not in contractual relations with social agricultural organisations remained excluded from social security schemes.

When the development model changed in the 1960s, the need for a more coherent economic, social, and social policy development came to the fore. In practice, this meant regulating the situation of social groups that were not employed but were instead engaged in independent economic activities. Private peasants together with their family members, were a typical example. Health insurance was the first to be tackled. The Act on Peasants Health Insurance (1960) provided for health insurance for private Peasants and their family members. This was an essential step towards improving the social situation of the peasants who did not want to be included in the socialist agricultural sector. Simultaneously, this was the beginning of the equalisation of their status with other forms of employment. The next step was to regulate the pension and disability insurance for peasants. The situation was acute and called for urgent action, as the peasants age structure reflected the aging population. Intergenerational solidarity was undermined due to the

migration to the cities, and the risks of poverty among peasants were increasing. During the 1960s, agriculture showed all the signs of the uncoordinated (or onesided) economic and social policies of the post-war period. The neglect of private peasants and their social needs had consequences in everyday life, as relative poverty spread among the rural population.

Data on the population's personal income revealed that between 1963 and 1988, peasants had the lowest incomes, on average. Between 1968 and 1978, they lagged behind the average by as much as 37.4%. This was the exact period when the most vital steps were taken towards regulating the peasant's social situation. The number of exclusively agricultural households was modest, amounting to just 12% in 1968. However, their poor material situation was widely publicised in the media. The steady decline in their numbers (for example, in 1988, exclusively agricultural households represented only 1.7%) also allowed for the integration of peasants into the national social security systems, as ideological prejudices were disappearing. In terms of average income, the so-called mixed households (those combining two sources of income) stood out the most. They combined income from agricultural activities and employment in the industry or service sectors. In 1983, mixed households exceeded the average income by as much as 30%. At the same time, mixed households amounted to 24% in 1988 (Rendla, 2022, 190–191), as their share had been steadily increasing since the 1960s. The agricultural population consciously undertook this income strategy to maximise their incomes and gain access to the social security systems. However, implementing these strategies also led to an increased workload for the mixed household members. Thanks to the integration of different sources of income, social distress in rural areas was limited to a relatively small group of the rural population – to those who insisted exclusively on agricultural income.

The consensus on integrating peasants into the national social security systems was first reached in the political arena, with the decisions of the highest Party authorities, reached in 1970. After securing the political consensus, it was time to amend the legislation. Various acts, constitutional amendments, and ultimately the Constitution of 1974 established the framework for implementing peasants pension insurance. In 1971, a constitutional amendment granted the peasants who were members or associates of cooperatives the right to full health, pension, and disability insurance if they earned an income at least equal to that of workers in the social sector of agriculture (Lazarević et al., 2023, 235). The 1972 Peasants Old-Age Insurance Act set out the minimum peasants' pension. Peasants pension insurance was organised outside the existing pension insurance system in the context of a dedicated institution (the Self-governing Interest Community of Peasants Old-Age Insurance). The fund was financed by contributions from peasants and from the republic and municipal budgets. Importantly for family members,

especially women in agriculture, the Act also introduced survivor's pensions after the death of the insured agricultural activity operator. According to the principle of "one farm, one pension", women in agriculture were not included in the old-age insurance. The scope of benefits for peasants was minimal and could not be compared to the scope of benefits under the general pension insurance scheme enjoyed by other social groups. The difference was justified by low contributions (Remec, 2017, 94–95).

The Act still distinguished between peasants who maintained contractual relations with the socialist agricultural sector (the cooperative system) and independent peasants. The policy, introduced after the abandonment of collectivisation, thus persisted. The carrot-and-stick principle was introduced as early as the beginning of the 1950s. Peasants who cooperated with the socialist cooperative sector gained certain economic and social benefits, while those who refused to participate were left without benefits (various forms of insurance). The government's fundamental objective – the nationalisation of agricultural production – was abandoned as late as the 1980s, only shortly before the end of the socialist system.

To ensure the social security of peasants, the Cooperative Association of Slovenia concluded a contract with the Pension Fund for its members in November 1974. Only peasants who entered into a more permanent production cooperation agreement with an agricultural cooperative or a state agricultural enterprise were included in the insurance, while this cooperation also had to represent most of the farm's net income. The insured persons were free to choose between five classes of insurance bases, depending on their net income. The insurance depended on the production cooperation, whereby the insured person and the cooperative or state agricultural enterprise were jointly and severally liable for the payment of contributions (Lazarević et al., 2023, 235). At the end of the 1970s, the option of a maintenance allowance was introduced as a further way of strengthening the peasant's social security. Peasants became entitled to a maintenance allowance if they handed over their land to the social farming sector or farmland funds. Just like in the case of the old-age pension, they became entitled to this benefit after reaching the age of 65, and the amount of the maintenance allowance could not be lower than the minimum old-age pension (Remec, 2017, 95). It is important to note the extension of the right to maternity leave for female peasants. In 1981, the Cooperative Association of Slovenia regulated the right to maternity leave for its female members under the same conditions as for other employed women (Lazarević et al., 2023, 236).

The changes to the pension legislation, introduced in the mid-1980s, were significant. Peasants were finally integrated into a uniform health and pension insurance system. They were no longer subject to exceptional treatment, which had also been discriminatory throughout the

period after World War II. The situation of the peasants who were not insured through cooperation with the state or the cooperative agricultural sector was regulated in 1984, as insurance became compulsory for the entire agricultural population. All peasants could choose between various insurance bases for their old-age pensions. Unlike in the case of workers, it was difficult to determine the exact income of a farm and assess contributions on that basis. The responsibility for the old-age pension was therefore left to the peasants themselves. The lowest insurance base included only old-age, disability, and survivors' pensions. The higher insurance bases also included the entitlement to a disability allowance for physical impairment, as well as to an assistance and attendance allowance. Those peasants who paid the contributions for the minimum pension for a completed pension qualifying period gained equal rights as all other population groups.

However, there was still a distinction between peasants who cooperated with the social agricultural sector and private peasants. The Act provided for three types of beneficiaries. The contributions of the peasants tied to the state agricultural sector who opted for higher pension-rating bases were partly covered by the organisation with which they cooperated. The second category included peasants who were tied to the state agricultural sector but paid contributions in the amount that did not guarantee a minimum pension. They had to pay the full contributions themselves. Independent peasants who were not contractually bound to the state agricultural organisations also had to cover the full cost of their pension insurance themselves. The obligation to pay contributions, regulated in such a manner, was a source of great frustration among peasants. In many cases, peasants were not included in the pension insurance at all, despite the legal obligation to do so, because the Act did not provide for any sanctions against the individuals who avoided insurance (Remec, 2017, 101).

In the late 1980s, during a profound economic and social crisis and hyperinflation, the peasant's health and pension contributions became a disproportionate burden, especially for those peasants who had to pay the contributions entirely out of their own pockets. The amendment of the Peasants Pension and Disability Insurance Act of July 1990 reduced the minimum insurance base for peasants to half of the guaranteed personal income. The issue of minimum pensions was resolved by an amendment to the Act in March 1991, when the pension assessment was set at a minimum of 35% of the minimum pension base. The 1992 Pension and Disability Insurance Act abolished the differences in peasants' rights. The extent of peasant's rights under this insurance depended on the level of the insurance base chosen. The peasants who did not meet the income condition for the compulsory inclusion in pension and disability insurance could opt for voluntary insurance (Lazarević et al., 2023, 236).

INTEGRACIJA KMETOV V SISTEM SOCIALNE VARNOSTI V SOCIALISTIČNI SLOVENIJI

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POVZETEK

Socialne pravice so v socialistični Sloveniji izvirale iz delovnega razmerja. V kmetijstvu je bilo mišljeno, da bodo kmete s politiko pospešene industrializacije in podružabljanja kmetijstva postopno odpravili kot poseben družbeni sloj. Večinski del naj bi našel zaposlitev v nekmetijskih dejavnostih, drugi naj bi postali delavci v državnih (zadružnih) kmetijskih podjetjih. S tem bi pridobili tudi pravico do socialnih storitev. V primeru zasebnih kmetov je prišlo do odstopanja od tega načela. Oblast jih je sicer tolerirala, vendar jim ni lajšala položaja, saj ni regulirala njihovega socialnega zavarovanja. Zasebni kmetje so imeli tako dve možnosti za reševanje svojega socialnega položaja. Lahko so sodelovali s socialističnim (družbenim/zadružnim) kmetijskim sektorjem ali se zaposlili v drugih sektorjih. Tako so izpolnili pogoje za vstop v sheme socialnih zavarovanj. Ali pa so bili brez vsake oblike zavarovanja, če so vztrajali kot zasebni kmetje. V tej kategoriji so dolgoročno beležili naraščanje revščine, ki ni bila politično vzdržna. Zato so zasebne kmete vključili v zdravstveno zavarovanje leta 1960. Od sedemdesetih letih dalje je nato sledilo postopno vključevanje zasebnih kmetov v pokojninsko zavarovanje. Končno so v osemdesetih letih uredili še vprašanje porodniškega dopusta za kmečke ženske. Zasebni kmetje so tako postali statusno in po obsegu socialnih pravic izenačeni s prebivalstvom, ki je bilo redno zaposleno.

Ključne besede: ekonomska in socialna politika, kmetje, sistemi socialne varnosti, socializem, Slovenija

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*"THIS MUCH YOU SHOULD KNOW: I WAS LESS AFRAID OF A SNAKE
THAN OF MY HUSBAND":
OLDER WOMEN'S LIFE-STORIES ON POVERTY AND VIOLENCE*

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ABSTRACT

This article presents the findings of a study examining the lifelong experiences of older women affected by social deprivation, poverty, and domestic violence. Employing a life course perspective and biographical narrative interviews, the research reveals a constellation of interrelated factors that have shaped and reinforced these women's marginalization. Key among these are the intergenerational transmission of deprivation, limited access to social and cultural capital, the presence of parental and/or spousal alcoholism, and the pervasive influence of patriarchal norms – both within the family and embedded in dominant institutional culture.

Keywords: older women, poverty, (domestic) violence, life course perspective, biographical narrative interview, Slovenia

*"TI BASTI SAPERE QUESTO: AVEVO MENO PAURA DI UN SERPENTE CHE DI MIO MARITO":
STORIE DI VITA DI DONNE ANZIANE TRA POVERTÀ E VIOLENZA*

SINTESI

Questo articolo presenta i risultati di uno studio che analizza le esperienze vissute nell'arco dell'intera vita da donne anziane colpite da privazione sociale, povertà e violenza domestica. Adottando la prospettiva del corso di vita e ricorrendo a interviste narrative biografiche, la ricerca evidenzia una costellazione di fattori interrelati che hanno contribuito a plasmare e rafforzare la marginalizzazione di queste donne. Tra i principali elementi emersi vi sono la trasmissione intergenerazionale della privazione, l'accesso limitato al capitale sociale e culturale, la presenza di alcolismo in ambito genitoriale e/o coniugale e l'influenza pervasiva delle norme patriarcali – sia all'interno della famiglia sia radicate nella cultura istituzionale dominante.

Parole chiave: donne anziane, povertà, violenza (domestica), prospettiva del corso di vita, intervista narrativa biografica, Slovenia

INTRODUCTION

As the population in EU countries continues to age rapidly, old-age poverty is becoming an increasingly urgent issue for public policy and social services. Data indicates that poverty tends to increase with age, while the gender gap in poverty is also widening.¹ Over the life course, women consistently have lower incomes than men and are more likely to work in low-paid and insecure employment. This disparity is largely attributed to the gendered division of labour and traditional gender roles, which have had a long-term impact on the economic positions of both men and women.

A review of research and literature in Slovenia reveals that old-age poverty has received limited scholarly attention. Notable exceptions include the research project "Poverty and Material Deprivation of the Elderly" (Stropanik et al., 2010) and the accompanying monograph (Hlebec et al., 2010), which offer valuable insights into the lives of older people living in poverty and their strategies for coping with various forms of social exclusion. However, there has been even less focus on the intersections of poverty, age, and gender – particularly the poverty experienced by older women. This oversight is rooted in the historical marginalisation of women's issues (Leskošek, 2019). Furthermore, the intersection of poverty, age, gender, and (domestic) violence remains a significant blind spot in both research and policy discourse.

In response to these gaps, we seek to contribute to the existing body of knowledge by analysing older women's experiences of social deprivation, poverty, and (domestic) violence across their life course. While conceptualising this article, we considered the following research questions: how do older women living in poverty construct and narrate their life trajectories? What role has (domestic) violence played in shaping their lives? How do they retrospectively view their experiences of violence, and how did they manage to escape it? Who supported them in doing so? Finally, how have social policy frameworks addressing domestic violence evolved over time, and how have these women perceived and experienced these changes?

BACKGROUND

Our research is grounded in the life course perspective, a theoretical model that facilitates the examination of how earlier life experiences shape conditions in old age. This perspective conceptualizes life courses as a series of trajectories resulting from

the complex interplay between individual agency and social structures or contexts (Elder et al., 2003; Carr, 2018; Danner, 2022). As elaborated by Dannefer and Settersten (2010), the life course perspective encompasses two complementary paradigms: the personological paradigm, which emphasizes individual agency and change, and the institutional paradigm, which highlights the social construction of life stages. This dual approach to studying the complexities of aging posits that "individual life courses are produced not only by individual choices and actions, but also by the social context (institutionalized life course), and by interactions with others within structural possibilities and constraints" (Van Regenmortel et al., 2019, 3).

One of the core concepts within life course theory is the cumulative inequality perspective (DiPrete & Eirich, 2006; Carr, 2018; Danner, 2022), which posits that disparities in health, wealth, and well-being tend to increase over the life span. The main argument is that advantages bring additional advantages and disadvantages bring additional disadvantages, so that relatively small inequalities in early life are exacerbated over time. This perspective is particularly useful for understanding disparities in later life, especially regarding physical health and economic well-being – dimensions that are further shaped by structural inequalities, including those based on ethnicity and gender, as discussed below.

Gender inequality functions both as a cause and a consequence of women's heightened vulnerability to poverty. Furthermore, existing theories and empirical research exploring the relationship between poverty and (domestic) violence reveal a complex web of interactions and interdependencies. Analysis of the European Union Fundamental Rights Agency (2014) survey shows that women reporting difficulty in managing on their current income (subjective poverty) are more likely to report experiencing intimate partner violence recently and across their lifetimes. Specifically, 30 per cent of women who reported financial hardship had experienced physical or sexual violence since the age of 15, compared to 18 per cent of women with greater financial resources. Financial strain is also linked to higher rates of psychological violence (Fundamental Rights Agency, 2014). Several scholars (Slabbert, 2016; Gillum, 2019) argue that poverty and material hardship not only contribute to the risk of domestic violence but are also exacerbated by it.

However, any interpretations linking poverty and exposure to domestic violence and abuse (DVA) are

1 The 2022 indicators for the-risk-of-poverty and social exclusion in Slovenia confirm that older women (F) are generally worse off than older men (M): the at-risk-of-social-exclusion rate (F 22.9%, M 15.2%), the at-risk-of-poverty rate (F 22.2%, M 14.6%), the persistent at-risk-of-poverty rate (F 12.5%, M 7.4%), the risk-of-poverty in single-person households rate (F 41.3%, M 40.9%) and the severe material and social deprivation rate (F 2.1%, M 1.1%) (Trbanc et al., 2024, 56). Furthermore, the latest available data from the Statistical Office of the Republic of Slovenia (2024) show that the gender gap is particularly large (and increasing over time) in the over 75 age group: the at-risk-of-poverty rate in 2023 (F 26.5%, M 11.4 %) and in 2024 (F 29.7%, M 13.4%).

likely to be inadequate in the absence of a broader understanding of the social drivers of gender-based violence associated with patriarchal norms and practices in particular (historical) contexts. As observed by Fahmy & Williamson:

[...] *in classed and gendered societies, the cumulative and additive nature of social disadvantage is such that we might expect the interaction of socioeconomic inequalities with patriarchal norms to result in heightened vulnerability to DVA for women experiencing poverty. Within this perspective, the association between poverty and DVA is as an interaction effect where poverty heightens women's existing vulnerability to DVA arising from patriarchal social relations.* (Fahmy & Williamson, 2018, 9–10)

METHODOLOGY

The data presented in this article are part of a broader study conducted in 2024, within the research project "Everyday Life and Life Course of Older People Living in Poverty",² exploring the life stories of 33 individuals aged 65 and over – 14 men and 19 women – who live below the poverty threshold. To gain rich, interpretive insights into the lives of groups that are often underrepresented or overlooked in quantitative research, we employed qualitative methods, specifically the biographical narrative interview. This approach allows for an in-depth exploration of individuals' experiences across the life course. The social context of ageing and old age is constituted by individual and interactive practices in a complex and inconsistently organized and multi-layered environment with – for the individual – different levels of relevance: these include everyday situations as well as habitus-related life dispositions and structured socio-historical spaces through which the currents of social power and inequalities flow. While ageing is socially constructed, it is also deeply individual. Biographical narrative interviews are particularly valuable in studies of ageing and old age because they illuminate both the commonalities and diversities in older people's life trajectories. They help uncover how family patterns, cultures and subcultures are expressed in individuals' lives (Birren et al., 1996). At the same time, these interviews also reveal how individuals navigate, struggle with, resist and overcome (or not) the obstacles and challenges of the time and societies in which they have lived.

This method is especially useful when little is known about a topic, when we assume the existing knowledge and interpretations are insufficient, or when we want to emphasize the perspectives of the people being interviewed. We are aware that in life stories we will find a bridge between the personal voice and the social norms and cultural imperatives from the perspective of the person concerned. What we hear is always already an interpretation, never the naked, unmediated "truth." The biographical approach is particularly well-suited to studying "silenced social groups" who rarely, if ever, get a voice. This is one reason why biographical methods hold a central place in feminist and women's studies (Willemse, 2014; Mažeikiene, 2015). In our study, we used semi-structured biographical narrative interviews to guide participants in telling their life stories by identifying particular topics, life chapters, important life events or turning points, and challenges (Van Regenmortel et al., 2019). At the same time, we encouraged participants to go beyond the prompts of the interview guide – to reflect freely on connections between their past and present, and to share their thoughts on the imagined futures.

Sample and analysis

We employed a purposive sampling method to recruit narrators, collaborating with Centres for Social Work, the Red Cross, and leveraging the personal networks of the research team. Our sampling strategy ensured diverse representation across gender, ethnicity, marital status, and the urban-rural divide, spanning from Slovenia's southwestern regions through the capital city of Ljubljana to the northeastern areas. Participants were interviewed and recorded in individual sessions ranging from 38 to 238 minutes. The sessions took place in participants' homes, private interview rooms at Centres for Social Work, Red Cross facilities, and, in one instance, a Senior Activity Centre. Anonymity and confidentiality were guaranteed, and informed consent was obtained prior to each interview.³ The verbatim transcripts were thoroughly reviewed, with each life story summarized to identify predominant themes and subthemes (i.e., family of origin, childhood, relationships with parents and siblings, schooling, employment, housing, partnerships and children, income, interactions with institutions, retirement, health, social networks, current life, and future). During this immersive phase, it became evi-

2 The project *Everyday Life and Life Course of Old People Living in Poverty* (J5-4587). Project duration: 1. 10. 2022–30. 9. 2025. Project partners: Faculty of Social Work, Faculty of Social Sciences, Peace Institute and Institute for Contemporary History (principal investigator: prof. Vesna Leskošek). The project was financially supported by the Slovenian Research and Innovation Agency.

3 The research received ethical clearance from the Ethics Committee of the Faculty of Social Work, University of Ljubljana, December 4, 2023 (decision no. 033-3/2023-23). The empirical data supporting this study are securely stored by the project team and are available from the corresponding author upon reasonable request.

dent that the issue of (domestic) violence emerged as a recurring theme, despite not being a focus of the original research design. Eight women spontaneously addressed this topic, and their narratives form the empirical foundation of this article.

Each of the eight narratives in the subsample was reread and annotated with margin notes referring to general themes, interconnections with other narratives, and additional insights. In their life stories, we identified several themes⁴ that can be analysed individually although they are interconnected, intersecting and intertwining. From the perspective of the individual woman's life course, we can observe how these processes, events, incidents, and ruptures trigger new developments, conflicts and ruptures. After multiple readings and reflecting on the interrelations among themes, a final coding scheme was developed, categorizing the narratives into four strands: 1. poverty, intergenerational transmission of deprivation, survival strategies, help and support, 2. education, occupation, and employment, 3. (domestic) violence, alcoholism, institutions and 4. life events and turning points, and reflexivity.

The narrators⁵

FERIDA (72) married young and moved from Bosnia to Slovenia. She completed vocational school and worked in a factory for 24 years, supplementing her modest income with jobs as a cleaner and housekeeper. Ferida was married twice, and both relationships were marked by severe domestic violence. Now divorced, she enjoys a peaceful and fulfilling life. Her son, who spent his childhood and youth with his father due to various circumstances, means the world to her.

SELMA (71) moved to Slovenia after marrying at the age of 16. She completed primary school through evening classes and later took a six-month sewing course, eventually working as a production worker. Although she did not experience violence in her intimate relationships, she was surrounded by violence from an early age. She would not wish the life she had on anyone.

NEVA (72) attended elementary school for four years and was very sickly as a child. She was never formally employed but earned a living through field work, picking herbs, helping in a bakery, and briefly caring for a disabled person. Today, she faces serious health issues and lives with her 92-year-old mother and her 40-year-old daughter, who is unemployed and currently applying for family caregiver status. All three women endured severe domestic violence and held hands as they shared their life stories.

SONJA (65) looks younger than her age. As the eldest child, she had to look after 8 siblings from an early age. The whole family lived in fear of an abusive father. After completing elementary school, she began working as a cleaner, later taking jobs as an unskilled production worker and cook. Today, both she and her husband receive a minimal pension. In retirement, Sonja dedicates time to volunteer work and enjoys pursuing her hobbies.

IVANA (65) was raped as a child by a stranger. At the age of 16, she moved in with her husband's family, who harassed and abused her, and later joined her husband, who was working in Slovenia. She was employed as an unskilled production worker and now suffers from severe health problems caused by years of intimate partner violence. She has been living alone for several months while her husband is in the hospital. No longer willing to suffer in silence, she is determined to confront him upon his return.

MARA (85) found work as a housekeeper in the capital of one of the Yugoslav republics after completing primary school. At the age of 20, she returned home and took a job as an unskilled production worker. Her husband abused her for many years. She finally left him upon retiring. Later she worked for years as a domestic worker and helped with the grape harvest. Today, she is content with her life, in good health, and still occasionally helps in the vineyards.

NADJA (70) completed primary school and has worked as a cleaner. Years of workplace bullying and severe violence from her alcoholic husband led to depression, and she was hospitalized twice. After 20 years of marriage, she divorced him. Now single, she is happy to live in peace – free from violence and alcohol. She is currently saving for a holiday in Greece or Spain.

MARIJA (70) grew up with an abusive father and began working at the age of 15. She completed her primary school education through evening classes and later took courses in typing and sewing. Her husband was an alcoholic and a violent man. After a traumatic divorce that left her homeless, her ex-husband was granted custody of their child, and she gradually lost contact with him. Throughout her life, she had only one friend to turn to for support.

KEY THEMES IN WOMEN'S LIFE STORIES

Poverty, intergenerational transmission of deprivation, survival strategies, help and support

All the women interviewed live below the poverty line. When asked about their monthly income, they responded openly, and also told us whether they had

4 In the initial analytic review, we identified 9 themes: social deprivation, poverty, intergenerational transmission of deprivation; education, occupation, employment; domestic violence; interactions with institutions, help, powerlessness; survival strategies, support; relationship with children; father's and/or partner's alcoholism; turning points in the life course; reflexivity.

5 Pseudonyms are used to protect the narrators' identities.

ever taken on a side job to make ends meet. Today, most of them live on modest pensions, none of which exceed €650. One woman, who was never formally employed due to chronic health issues, now depends on social assistance and a care allowance. All the narrators were born and raised in modest, even extremely poor families.

When my mother woke me up, I took the cows out to pasture, came home, washed quickly, ate something, and went to school. Halfway there, I met my sister and brother, and we swapped shoes, our boots. I took the better-looking pair for school, and the one heading home wore the worn-out ones. (Ferida, 72)

The narrators who spent their childhood and youth in rural Bosnia lived under severe economic and social deprivation:

There were eight of us children. My brother died. I have three brothers and four sisters. Life was hard. When we finished primary school – four years of it, back then – we immediately went to work in the fields... digging for a daily wage. (Ivana, 65)

All the narrators were involved in labour from an early age, often hard physical work, as Ivana recounts, or helped with household tasks and cared for younger siblings. Throughout their lives, none of the women managed to rise significantly above the modest conditions of their families of origin. While their standard of living is better today than that of their ancestors – since the general material, health, and hygiene conditions improved – they still belong, as we can assume their parents did, to the lowest income quintile. The same pattern appears to continue with their children. Their levels of education and employment do not differ significantly from those of their mothers. We can therefore speak of an intergenerational transmission of disadvantage.⁶ No upward social mobility has been observed. Within a culture of poverty, reinforced by additional factors such as domestic violence and frequent alcoholism, social status appears frozen in time. The narrators live today in very modest conditions, yet they do not complain, much less resist. It is as if doing so would be meaningless.

My pension is... so low [tiny smile, AN]. I retired with a pension of 451 euros. Each year, they increased it by just two or three euros... and that was it. (Selma, 71)

I somehow managed to make ends meet – and I still do. My pension is now 606 euros. (Mara, 85)

With modest incomes it is difficult to save anything. Those who do manage to set something aside speak of monthly savings that rarely exceed 30 euros.

I'm one of those people with a meagre pension. But somehow... I always manage to save a little. When I got divorced for the second time, I was often hungry. I didn't have enough money for food. I stole [she emphasizes the word indignantly, AN] a few slices of bread from [names a factory where she used to work, AN] just so I'd have something to eat on Saturdays and Sundays... [she cries, her voice trembling, AN] And... and then I told myself: "I will never be hungry again!" (Ferida, 72)

The survival strategies they use are similar: growing their own produce when health permits, buying cheaper food from the countryside, selling small handmade items, and above all, carefully choosing where they buy their basic necessities.

I keep an eye on discounts and special offers, washing powder, for example. I check everything: all the ads, all the flyers... for everything. (Sonja, 65)

I always look for the best deals and shop where it's cheaper... or I knit something, like a pair of socks for someone. I have a friend, and I start knitting socks for her in the summer so I can give them to her at the end of November. She's doing me a favour [by buying the socks, AN] – that way I get something out of it – and then she gives the socks to her friends for Christmas. (Ferida, 72)

Their incomes are not sufficient to take out loans when unexpected expenses arise. In such cases, they turn to friends, usually women, and, to a lesser extent, to relatives.

⁶ According to the data, released by the Statistical Office of the Republic of Slovenia (Inglič et al., 2024), the adult's financial situation depends on the education and employment status of their parents during their youth. The education level of either the father or the mother significantly determines the current/future material situation of their children (as adults). The share of persons aged 25 to 59 who experienced severe material and social deprivation in 2023 was higher among those whose parents had lower education levels during their youth. Similar disparities are also evident in the share of persons below the at-risk-of-poverty rate and those at-risk-of-poverty or social exclusion, with differences being even larger regarding the mother's education. Among people who assessed the financial situation of the household in which they lived in their youth as very bad or bad, 26 per cent are still (in 2023) struggling to make ends meet (difficult or very difficult financial situation).

Our combined pension is 1100 euros. If anything unexpected happens, anything at all, we're in trouble. Only [names a friend, AN] can lend us some money. (Selma, 71)

There's just this one friend. She lives in [names a place near Ljubljana, AN]. She's been helping me since my youth, right up to today. (Marija, 70)

Jožica, the stonemason's wife, would occasionally give us an egg or two and made pancakes for the children. She once said, "You should have told me, then I would have given you more." But I didn't dare to ask... (Ivana, 65)

During times of hardship, some narrators turn to humanitarian organizations for help. They discuss these experiences calmly and thoughtfully, approaching them with wisdom and practicality rather than with shame or fear of stigma. Others, however, were more hesitant, worried about embarrassing their children. One narrator described how she waited for a kind of "permission":

I was living from hand to mouth, just barely managing to make ends meet. Then my son said, "Mom, maybe you could... you could also go to the Red Cross." And that's how I started coming here. I get some parcels – it's not much, but it helps. (Mara, 85)

Another narrator shared the deep shame and desperation she felt when she sought material assistance from the Centre for Social Work decades ago:

"I have brought these papers, and I am asking for your help." She took one look at them, looked at me, and said, "Ma'am, do you really think you can just come here, and I'll say, 'How much do you need?' and just give you some money?" I took the papers back and said, "Look, you can shove them up your ass!" But... the tears just kept rolling down my cheeks. I didn't want to, but I humiliated myself so much! (Ferida, 72)

Rather than relying on formal aid, most narrators depend(ed) on themselves and their close circles of friends and family. Those who did turn to humanitarian organizations for modest material assistance often found ways to give back, typically through volunteering. Helping others holds deep meaning for them.

Education, occupation, employment (and marriage)

The time adverb "early" in relation to educational attainment, employment and marriage is characteristic of all narratives. The women in our sample completed their education at an early age: all but one had only

completed (or partially completed) primary school. Likewise, all but one – whose health prevented it – entered the labour market before reaching adulthood. Similarly, all but one married before the age of 20.

I said, "I'll marry the first person I meet. I don't care if it's someone I pick up off the street!" And that's exactly what happened. He was working in Ljubljana, and I came here. He told me, "You have one month: if you find us an apartment, you stay; if not, you go back [to Bosnia, AN]." So, I found an apartment and I stayed. (Ferida, 72)

The narratives clearly indicate that the women's early marriages and partnerships were closely linked to conditions within their families of origin. For the migrant women in particular, marriage often represented an escape from unstimulating and typically oppressive home environments. In three cases, it also entailed leaving the household of the partner's parents, where they had been subjected to extreme subordination, and in one case, sexual harassment. All but two of the narrators reported experiencing violence in their relationships, including severe physical, economic, and psychological abuse. Their low levels of formal education were largely attributed to limited opportunities to continue schooling.

I finished primary school, and that was it. That's where everything ended. No one ever asked if I wanted to continue my education. No one asked anything. Nobody, nobody, nobody... (Sonja, 65)

I wasn't good at school; I tell you that honestly... I only managed four years. (Neva, 72)

...we had no money, even if I wanted to continue... I think it would be good for me to continue my education, but there was no money, because we were four children, only our father worked... and soon my brother also started working in the mine, he took any job he could get, and I took a job as a cleaner, I cleaned for 37 years. (Nadja, 70)

References to their school years and vocational training were brief, suggesting that this phase of life was not perceived as particularly meaningful or impactful. While some expressed regret over their inability to pursue further education, such opportunities were generally out of reach due to financial constraints and a lack of parental support. In contrast, employment emerged as a significant and empowering aspect of their lives. While initially a necessity, work came to represent much

more: it was a vital resource that enabled several women to leave abusive relationships after enduring years of suffering.

My life was hard. I started working because I wanted to buy clothes and sanitary pads for my daughter. I didn't want her to wear rags like I did. That's all I had – a few rags – because he wouldn't give me any money. I wouldn't wish that on any woman – not having her own money. The way I lived, I wouldn't wish that on anyone, no way. My husband beat me. And his mother always said: "Son, you only have one mother: believe your mother, don't believe that bitch!" (Ivana, 65)

When the narrators entered the labour market – in the late 1960s and 1970s – employment opportunities were relatively accessible, particularly in industrial manufacturing and cleaning sectors. Job leads were typically obtained through acquaintances or family members. However, due to their young age, some narrators were not permitted to make independent decisions regarding the money they earned.

Of every salary I received, I gave half to my father. I don't know why... (Sonja, 65)

I started working when I was fifteen and a half. I had to give half of my salary to my mother, and the other half went straight into a savings account. No, I wasn't allowed to keep any money for myself, not until I turned eighteen. We needed it to survive. In practice, I was providing for myself and my younger brother. (Marija, 70)

To secure better-paying employment, some of the narrators sought to further their education by attending night school or enrolling in various courses, such as typing, sewing, or bookkeeping. However, the employment situation changed significantly for them following Slovenia's independence and the establishment of a new political and economic order, during which many of the factories where they had previously worked went bankrupt.

My husband's sister worked there and told me they were looking for seamstresses. I said, "But how can I do that? I don't have any qualifications!" So I took a six-month sewing course while I was working at [factory name, AN]. Then I switched jobs and went to [another factory, AN]. I think I worked as

a seamstress there for about eighteen years. (Selma, 71)

I started working there... after one month – no salary. The second month passes – no salary. Third month – no salary. (Ferida, 72)

Most women also engaged in side jobs, often seasonal in nature, such as fruit and vegetable picking, gathering medicinal herbs, selling handicrafts, or working as domestic helpers.

I worked in [factory name, AN] for thirty years. I also helped with the grape harvest in the vineyards. I helped around a lot with housework, I was a maid in [names a city, AN]. (Mara, 85)

These informal jobs were often unpaid; instead of getting some money, they were compensated with small goods or favours, described as receiving "a bit of this and that."

I worked my ass off! I cleaned, I cut chestnuts for the Albanians who roasted and sold them, I knitted clothes for my neighbours' kids, I sewed... But if someone had reported me for sewing at home, they would've cut off my benefits! So I said: fine, I won't ask for money – instead of paying me, bring me some food, or washing powder, or coffee... (Marija, 70)

And she went to take care of this woman, to nurse her. She did everything – cared for her, watched over her – but she didn't get paid! He just gave her a little bit of this and that. (Maja, Neva's daughter, 40)

Childcare arrangements were typically informal as well. When the women worked, their children usually did not attend kindergarten but were cared for by a partner, relative, neighbour, or friend. The women often coordinated their work schedules to care for one another's children, stating that "we took turns."

(Domestic) violence, alcoholism, institutions

Since the topic of (domestic) violence was not included in the interview protocol, we did not explicitly ask about it, but at least eight women who had experienced it decided to talk about it, hesitantly at first, then with a wide-open narrative flow. In at least three cases, the act of speaking appeared to be both traumatic and therapeutic. For one narrator, it was the first time she had ever spoken about

being raped as a child.⁷ For all but one of these women, the experience of intimate partner violence had ended by the time of the interview, either because their partners had died or because they had divorced them. The only woman still living with an abusive partner was unlikely to face further physical violence, as he was terminally ill and hospitalized at the time of the interview. She is waiting for him to return, when:

I'll tell him everything, everything – just to get it off my chest. He's said "Fuck you" to me more times than I have hairs on my head. I haven't slept with him in over twenty years, I just can't. I even told the priest in confession that I can't stand him. (Ivana, 65)

We identified a specific form of violence – one that has yet to be adequately named – which arises in two distinct contexts. The first involves parents withholding essential knowledge from their children, knowledge that is crucial for navigating life. For instance, a teenage girl became pregnant at the same time as her mother. Because pregnancy and childbirth were never discussed at home, she had no understanding of what to expect:

I got pregnant and when I found out... I mean, I didn't know... I didn't know anything about it! I didn't even know when... that you get your period, I knew nothing [she emphasizes the last word strongly, AN]! Because we didn't talk about things like that... The night before I went into the delivery room, I asked my mom: "Mom, are they going to tie me up in there?" I thought that's what's gonna happen: you get there, and they tie you up. I told myself, "If they don't tie me up, then everything will be okay." (Sonja, 65)

The second context concerns systemic violence perpetrated by institutions, particularly when individuals are denied access to vital information about their rights and entitlements as citizens. One such case involved a young family who illegally moved into a 12-square-meter room in an abandoned building, later slated for demolition by the owning company.

Where was I supposed to go with a baby? She was sleeping under the window when they came and started tearing the place down. I told them, "Go

on then, keep going – you'll crush the baby under the rubble!" But they didn't stop. I pulled her close and held her against my chest. The police came and tried to throw us out. I said, "Do what you want, I've got nowhere else to go. Put me wherever you want, even in jail if you must!" (Selma, 71)

When asked if they had sought help from any institution, Selma responded that they had not, fearing legal repercussions due to their unauthorized occupancy. After the police forcibly evicted them, they found temporary refuge with relatives who also lived in poverty. This form of violence is closely tied to (epistemic) ignorance,⁸ itself deeply interwoven with deprivation and poverty.

Intimate partner violence is certainly a central theme in the narratives about violence. Six of the eight women had survived severe and prolonged abuse.

I was pregnant. When you take a man off the street as your husband, of course you know you won't get along with him... that all hell is gonna break loose... And we argued and he started beating me... and then he shot me! ... Somewhere here [points to her lower abdomen, AN] ... and I was already pregnant at the time though I didn't even know I was pregnant! It was 2 millimetres short of going through the middle of my pelvis ... And they [in the ER, AN] told me I was pregnant... And...because I'm an honest person... I'm like: "Hey, you made a mistake, now you're going to be a decent man". He says: "I'm not gonna hit you again! I beg you..." He cries like a child: "Please, just say that you did it yourself, that you shot yourself!" And they laughed at me: "Why here, why didn't you shoot yourself in the head?" (Ferida, 72)

Ferida's story is a typical example of being trapped in a cycle of violence. After divorcing her first husband, who took away her child – a fatal combination of rigid patriarchal ideology, according to which the child belongs to the father, and poverty – during her long-term stay at the hospital, she later entered another violent relationship:

When I divorced that man, I remarried two years later. And we immediately started saving money to buy a flat. And we bought a two-bedroom flat. And we lived together for 18 years... He hit me too, like... like... I didn't know how to behave, I didn't

⁷ At the age of eight, Ivana was raped by a stranger when she was sent to a well during harvest time to fetch water for the reapers. That evening, after she had crawled home bleeding, her father beat her. She never spoke about it, her mother died early, but when her father was dying, she decided to tell him and then changed her mind so that he could rest in peace.

⁸ Nancy Tuana addressed the concept of epistemic ignorance in her article published in *Hypatia: A Journal of Feminist Philosophy* (Tuana, 2006) and later co-authored a more extensive treatment with Shannon Sullivan in *Race and Epistemologies of Ignorance* (Sullivan & Tuana, 2007). Together, they developed a taxonomy of ignorance, illustrating how women's social position is shaped not only by their knowledge but also by their ignorance. They argue that ignorance is directly dependent on social power and is often meticulously constructed and maintained, either directly or indirectly. Let us add: its main medium are society's repressive apparatuses and bureaucratic practices.

know how to live! I didn't know what to say... if I said "good" he'd hit me, if I said "bad" he'd hit me. (Ferida, 72)

The severe physical violence had a profound and lasting impact on the women's health. In Ferida's case, it ultimately left her unable to have children. Ivana, similarly, is reminded of the violence with every sip and every bite she takes:

It was summer, he beat me, he choked me, he threw me to the ground and broke my skull. To this day I always drink water when I eat, it's the only way I can swallow food. Because he hurt me here. [points to her throat, AN]

For both Ferida and Marija, the cycle of abuse extended across relationships and generations. Ferida experienced violence again in her second marriage, while Marija, who grew up in a violent household, went on to live in an even more abusive environment as an adult.

And then he came after me, he threw me to the ground, hit my head to the floor, threw me down and forcibly got that – you know what – the little one jumped on him, "You're killing mommy!" and he locked the little one in a room and he took a knife, the big one, butcher's knife, saying he knows the kid is not his son, he knows that's why I didn't want another child, that he's gonna gut me, cut me from the belly up... well, then I passed out. (Marija, 70)

During the interview, Neva held hands with both her mother and her daughter as she recounted their shared history. They kept saying that they only survived because they had each other.

This much you should know: I was less afraid of a snake than of my husband [her voice breaks to a barely audible whisper, AN]. (Neva, 72)

Then he came and started kicking her. I remember it clearly, the image is so vivid in my mind: he came and... he poured boiling water on her back... she couldn't lie on her back for two months! He hit her on the head with an iron kettle, they were very big and heavy back then and smashed her skull. And he wouldn't let her see a doctor! A neighbour bought everything she needed to bandage her. She shaved her head and put the bandages on. ... I was just a child, but I remember everything! He wouldn't even let her change the bandages! It was the alcohol that did it! And one night he came home drunk, it was payday, and he started beating her! I lunged at him and... he grabbed me by the throat and started choking me. He choked

me until I passed out. Barely... she barely managed to get me out of his hands. [...] I passed his house on the way to school – we had already moved into my grandma's house – and I was so scared of him I wet my pants. (Maja, Neva's daughter, 40)

In all but one of the cases involving extreme, life-threatening violence, the perpetrator was an alcoholic. The women never downplayed their partner's excessive drinking, for instance, by saying "everyone drinks." Instead, they recognized alcoholism as a serious addiction and made efforts to address it.

I always went to the treatments with him. We used to come home after midnight and Grandma would look after her while I was away. I did everything I could to get him help. He needed therapy so he would stop... drinking [her voice breaks, AN]. For five years I tried to get him to stop... but... he just wouldn't quit! (Neva, 72)

Mara explained that her husband's alcoholism was ultimately what gave her the strength to end their abusive marriage.

He was a glassmaker, and glassmakers are always drunk... Always! And then, after the kids left home, I thought things would get better since it was just the two of us. But it got even worse. Without the kids around, he had even more control over me, that's how it was... He was horrible back then! I used to wish I'd outlive him by just a few days, just to know what it's like to be free and live a good life... (Mara, 85)

The reasons why the narrators did not leave or divorce their violent partners earlier varied. We deliberately chose not to pose this question directly, as it often carries implicit judgment or blame. Nonetheless, the women raised the issue themselves. They explained that they could not leave because of financial constraints such as mortgages, because their partner legally owned the home, because of threats to take the children away, or simply because they were too afraid.

What held me back the most were the five loans I had. But somehow, I found the courage to hire a lawyer. I asked him, "If I move out of the apartment, what's going to happen?" He said, "Expect a lawsuit, but the outcome is uncertain." So I held on. (Ferida, 72)

I always thought I should've gotten rid of him, I should've left, but... talk is cheap! When you're in that state of mind, you just can't. I was a wreck, I almost lost my mind... It's no wonder. I often say to myself, "Thank God I survived." That's all I say, "Thank God!" (Nadja, 70)

When the women shared their experiences of violence, we asked who had helped them and where they had sought support.

When my child was a baby and he [husband, AN] beat me to a pulp... I went to the police and social services. Do you know what they told me?!? "You must obey your husband!" Today it's different, today you can't hit anyone, you can't even scowl at anyone! (Ferida, 72)

Despite facing life-threatening violence, Neva and Maja described negative experiences with the police.

He threw an axe at my grandma! You call the police – "There's nothing we can do!" Sure, we called! But those were different times! Back then... if he doesn't kill you, it's nothing! If he doesn't kill you – "There's nothing we can do!" They showed up, but they didn't even arrest him! All they said was, "Calm down, pull yourself together... go back inside and sober up!" But how can you expect him to just calmly go back inside and sober up?!? (Maja, Neva's daughter, 40)

Nadja, on the other hand, said that what helped her most was being admitted to a psychiatric hospital. It offered a safe environment where she could distance herself from the abuse, and she found compassion and support among the medical staff and fellow patients.

In there, I got company, I tell you, there was a whole bunch of them, they listened to me, really listened, they helped me so much... But I tell you, in [name of psychiatric hospital, AN] it was really wonderful, it was like... I wouldn't even say it resembled a hospital, it didn't look like one at all, and I had a great time there. (Nadja, 70)

Even after the narrators found the courage to leave their abusive partners or pursue divorce, the suffering continued for at least two of them. Their experiences might have been different had they not been living in conditions of deprivation.

Well, after the divorce, this happened: our child was placed with my ex "until the mother's housing issue is resolved." The apartment we had belonged to the factory he worked for. After the divorce, I still lived with him for a while, but he beat me so badly I ended up with a broken nose and a fractured skull. (Marija, 70)

Ferida, whose only child was – and still is – her entire world, was hospitalized for an extended period.

I went home for the weekend from the hospital and took the child to my mother in Bosnia – to save the child. I thought that when I returned from the hospital, I'd find a place for us to live. But it didn't work out that way. I went back to the hospital, and he went to Bosnia and brought the child back. Then he took over our apartment... we were separated. He brought another woman from Bosnia. I couldn't prove anything against him... and the child stayed with him. (Ferida, 72)

Life events, turning points and reflexivity

At the conclusion of the interviews, we asked the women to reflect on the most significant events in their lives, how they perceive their lives in retrospect, and what they envision for the future. Employment emerged as particularly important – indeed, often crucial. They emphasized that work not only provided the means to support themselves financially, but also offered, for some, a space of relative respite from their otherwise difficult circumstances.

When my husband beat me and I went to work the next day, I heard people talking about how badly I was beaten, how badly I was treated and so on... and I thought: "Tomorrow is another day!" (Ferida, 72)

Even Selma, who had not experienced intimate partner violence, acknowledged the critical role employment played – not merely as a means of survival, but as a source of personal stability and purpose.

And I said, "I'm getting a job, and that's that!" My husband said he could take care of us, provide for all of us on his own. But I told him, "No, I want to work. I need to." (Selma, 71)

Some women endured horrific abuse for years, only leaving their partners when the violence became life-threatening or when their children were also targeted ("After that incident, after he tried to kill me, we ran away, we fled to my grandparents."; "So I left, you know, to save the child."). In other cases, women stayed in abusive relationships for decades, only leaving after their now-adult children intervened.

Then the children said, "Mom, why don't you leave him? Why don't you just go?" So I asked my brother if I could move in with him. Thirteen months after I left my husband, he was dead. (Mara, 85)

Life has been undeniably difficult for all eight women in the study; they have endured hardships they say they would not wish upon anyone.

My life's been miserable. I wouldn't wish it on anyone. Really, it's been one long struggle. I don't know how I made it through... It was for the children. But unfortunately, life's been hard on them too. (Selma, 71)

And yet, most expressed a sense of contentment with their current lives – some even described themselves as very content – despite living frugally. What accounts for this sense of contentment in later life, after so much suffering? We identified two central sources: their children and grandchildren, and a sense of peace, freedom, and autonomy.

These days, I really, really enjoy being single. First, I do everything here [at the Senior Activity Centre, AN], and then when I get home – I'm the queen of my castle! I've never enjoyed life like I do now. I live how I want, cook what I want, go where I want... rest when I feel like it... and I'm truly having the time of my life! (Ferida, 72)

I prefer being single. I come and go as I please, I answer to no one. I feel peace, I feel calm. Sometimes I look up to the universe and say, "Thank you for this peace." (Nadja, 70)

Ivana, who continues to live with her abusive husband, finds strength in her children and her deep religious faith.

Life was hard, it still is, but I am grateful to God that I have children, that they are healthy, that they have work and a roof over their heads... It was so hard, I endured so much, but then I took the pills, I wanted to kill myself, they pumped my stomach, I was in hospital for two days. I had a hard life, but God still gave me health and I just pray for a peaceful death. We will all go to the great beyond, just let it be peaceful. (Ivana, 65)

When they look to the future, their thoughts are most often directed toward their children and grandchildren – though primarily in terms of concern for their well-being, rather than expectations of receiving support in old age. Given their limited financial means, institutional care, such as placement in a nursing home, is not considered a viable option.

A nursing home? No way! How could we ever afford that? Our pensions together barely cover one person! It's sad, isn't it? (Sonja, 65)

When asked whether there had been any joyful or fulfilling moments in their lives, and whether they were satisfied with their current life, one of them responded:

There had been – the children and grandchildren. Or now, when I'm retired, when my husband is

away, he's down in Bosnia, and my friend comes by. We make coffee, lie on the bed, talk about the old days... we usually doze off. When we wake up, we eat something nice – something sweet, if there's anything to hand. (Selma, 71)

DISCUSSION

In reflecting on the themes that emerged from the narratives, we observed both parallels with and notable deviations from findings in international research on older, economically disadvantaged women who have experienced domestic violence. While some of our findings align with those of previous studies, important differences also emerged. For instance, unlike findings reported in studies from other countries, our participants did not exhibit self-blame in their reflections on the violence they endured. Prior research has shown that older women often internalize responsibility and look to themselves to explain what was going wrong in their households and their relationships, or express guilt over their perceived failure to protect their children from violence (Wendt & Zannettino, 2015; Hing et al., 2021). This tendency was absent in our sample.

Consistent with expectations and existing research, our data revealed strong intergenerational patterns and the cyclical nature of violence. All the narrators were raised in households where women were expected to be subservient and compliant with their husband's will, and where the physical punishment of women and children was normalized. As Sonja (2024) recalled, "My father was extremely strict, we were terrified of him." Several narratives highlighted that this dynamic persisted even in the absence of male authority figures. In such cases, mothers or mothers-in-law assumed dominant roles, exercising their authority to oppress and intimidate their children and daughters-in-law. Ivana (2024) recounted, "My mother-in-law took a wooden stake and started to beat me, screaming, 'You whore!'"

All participants were born and raised in severely disadvantaged or impoverished households, where daily life centred on survival and hard physical labour. Education and occupational advancement were largely inaccessible and deprioritized. Most of the women worked in industrial manufacturing and supplemented their income through informal labour, such as cleaning or domestic work. All identified as belonging to the lower working class. However, a notable divergence from international findings (cf. Podnieks, 2008; Saunders, 2020) emerged in the area of economic independence. In our sample, all but one woman had been employed, had access to a personal – albeit modest – income, and currently receive a pension, though often a minimal one. This financial autonomy allowed many of them to eventually leave abusive relationships or pursue divorce, even if later in life. A Canadian study of older women, victims of violence found that 70 per cent of them were completely economically

dependent on their partners, which kept them in violent relationships in later life (Podnieks, 2008). In Slovenian context, the full employment of women – an essential tenet of the socialist doctrine of emancipation – proved to be of critical importance for the women in our sample, often even redeeming. In the narratives collected for our study, it was not the lack of income but rather the lack of alternative housing options that emerged as the decisive factor. The primary reason for delaying separation was the difficulty of securing rental accommodation following divorce. Two women reported that, due to unresolved housing issues, custody of their children was awarded to their abusive partners. One of these women described the experience as the most traumatic event of her life.

With one exception, all the women in our study married very young – before the age of 20 – several years earlier than the average marriage age for their cohort.⁹ Early marriage aligned with prevailing patriarchal norms ("If you weren't married by 20, nobody wanted you," Ivana recalled), but it also served as a means of escaping violent families of origin and an environment in which they saw no viable future. However, this escape often led to similarly, or even more, violent domestic situations. Early entry into both the labour market and marriage compounded their economic vulnerability ("I gave my salary to my father"), reinforcing patterns of submissiveness and subservience within a deeply patriarchal context ("I kept quiet and did what I was told"; "My husband's father tried to rape me in the barn"). These early transitions into adult roles also left the women with limited life experience and exposed them to institutional paternalism.

It would be erroneous to generalize the narrators' experiences of violence or other recurring elements in their life courses. Nevertheless, we believe these accounts are indicative of broader patterns. All the women associated the violence they had endured with not only physical abuse but also with severe forms of coercive control, humiliation, and psychological manipulation. They described experiences such as being forbidden to leave the house or make eye contact with others, enduring sexualized insults, accusations of infidelity, and pressures to terminate pregnancies. For most, the cycle of violence began in their families of origin and continued into their own marital relationships. In five cases, prolonged exposure to abusive relationships resulted in significant physical and mental health issues. Chronic stress and psychological exhaustion stemmed from living in a constant state of fear, shouldering the burden of all domestic responsibilities, and often taking on additional informal work to compensate for the loss of family income caused by their partners' alcohol dependency. In five cases, the abusive partner was an alcoholic, and in four of these, the partner eventually

died because of excessive drinking. The lasting impact of intimate partner violence also shaped the women's attitudes toward future relationships. None of the women who had divorced or lost their partners wanted to form a new partnership in later life, emphasizing the value they placed on the peace and autonomy they had gained.

Some women had reported their partner's violence to the police or social services but were disillusioned by the institutional responses, summed up by recurring phrases: "There's nothing we can do!" or "You must obey your husband!" Reflecting on these experiences, the women frequently referred to the historical and institutional context in which the violence occurred: "Those were different times," and "Things are different now, no one can hit you." Their own perceptions of violence also evolved over time: "Today it's easy to talk, but back then I could not speak out about it or leave."

A further theme that emerged strongly from the narratives was that of female solidarity and informal support networks. Friends, neighbours, and relatives often played crucial roles during the women's most vulnerable moments. In three cases, this support became lifelong. The supportive role of other women was explicitly acknowledged in all but one narrative, in which the narrator described receiving compassion and care from fellow patients in a psychiatric ward, without specifying their gender.

CONCLUSION

The findings from the thematic analysis reveal a complex interplay of interrelated and mutually reinforcing factors across the life courses of older women living in poverty who had experienced (domestic) violence: material deprivation, limited social and cultural capital, the alcohol dependency of partners and/or fathers, and a deeply entrenched patriarchal mentality that extended beyond the private sphere and permeated the institutional systems they encountered. Yet, a significant turning point emerged in each of their lives: the moment when they were no longer subjected to domestic violence. This transition held profound significance for the women. Despite enduring many hardships, they expressed a sense of satisfaction with their current lives. Violence has left a more profound imprint on their lives than poverty itself.

Today, the narrators lead modest, quiet, and relatively contented lives. Some enjoy good health, while others do not. They enjoy sharing a cup of coffee with a friend after lunch and indulging in a sweet treat – "if there's anything to hand."

We thank them all for sharing their life-stories – they still resonate within us.

9 In 1971, the median age of first marriage for women in Slovenia was 24 years (Šircelj, 2020, 466).

»TAKU DA ZNASTE: KAČE SEM SE BALA MANJ OD SVOJEGA MOŽA«:
ŽIVLJENJSKE ZGODBE STAREJŠIH ŽENSK O REVŠČINI IN NASILJU

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POVZETEK

V članku so predstavljeni izsledki raziskave o življenjskih potekih starejših žensk z izkušnjami socialne deprivacije, revščine in nasilja v družini. Z uporabo pristopa perspektive življenjskega poteka in izvedbo biografsko-narativnih intervjujev smo v življenju starejših žensk, ki živijo z nizkimi dohodki in so bile žrtve nasilja v družini, odkrili številne dejavnike, ki so se združevali in medsebojno krepili: medgeneracijski prenos prikrajšanosti, nizek socialni in kulturni kapital, alkoholizem staršev in/ali zakoncev ter patriarhalna miselnost, ki je bila tudi del prevladujoče institucionalne kulture. Večina jih je izkusila krog nasilja: zloraba se je običajno začela v izvorni družini in se nadaljevala v lastni družini, vendar nobena od njih ni bila žrtev nasilja v poznejših letih. Predhodne izkušnje z intimnopartnerskim nasiljem so trajno vplivale na njihov odnos do partnerskih zvez: nobena od žensk, ki so se ločile ali katerih partner je umrl, si v poznejših letih ni želela skleniti nove partnerske zveze, saj visoko cenijo mir in samostojnost, ki so ju pridobile. Iz pripovedi je bilo razvidno, da je nasilje življenja starejših žensk zaznamovalo bolj kot revščina in pomanjkanje.

Ključne besede: starejše ženske, revščina, nasilje v družinah, perspektiva življenjskega poteka, biografski narativni intervju, Slovenija

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FOSTER CARE FOR OLDER PERSONS: A MODEL FOR ENSURING THE QUALITY OF LIFE AND INDIVIDUAL POVERTY REDUCTION

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ABSTRACT

The aim of this paper is to show how Foster care for older persons can ensure an adequate level of quality of life and demonstrate the potential of social investment strategies, focusing on the introduction of foster care, as a means to reduce poverty. The paper was prepared using a variety of methods: statistical, hypothetical-deductive, analytical-deductive, and comparative methods, including fundamental scientific techniques. The data show that older people placed in foster care have a subjectively more satisfying quality of life and that they rate their personal poverty better than before placement.

Keywords: foster care, older persons, social work, quality of life, individual poverty reduction, Republic of Srpska

AFFIDO FAMILIARE PER ANZIANI: UN MODELLO PER ASSICURARE UN'ADEGUATA QUALITÀ DI VITA E UNA RIDUZIONE DELLA POVERTÀ INDIVIDUALE

SINTESI

L'obiettivo del presente documento è quello di mostrare come l'assistenza agli anziani possa garantire un adeguato livello di qualità della vita e dimostrare il potenziale delle strategie di investimento sociale, concentrandosi sull'introduzione dell'assistenza agli anziani, come mezzo per ridurre la povertà. Il documento è stato preparato utilizzando diversi metodi: statistici, ipotetico-deduttivi, analitico-deduttivi e comparativi, comprese le tecniche scientifiche fondamentali. I dati mostrano che le persone anziane che beneficiano dell'affido familiare hanno una qualità di vita soggettivamente più soddisfacente e che valutano meglio la propria povertà personale rispetto a prima dell'inserimento.

Parole chiave: affido familiare, anziani, assistenza sociale, qualità della vita, riduzione della povertà individuale, Repubblica Serba di Bosnia ed Erzegovina

INTRODUCTION

Foster care in Republic of Srpska (one of the two entities of Bosnia and Herzegovina) is one form of protection for older persons, which is introduced through the social welfare system. Contemporary European trends in the development of care systems' beneficiaries of social protection are characterized by two basic principles: help and support to families through a range of measures aimed at changing circumstances in the family; or if it is not possible to achieve this, the beneficiary is displaced from the family and allocated as a short-term or long-term measure of care in a foster family or in one of the alternative forms of family care (Gudbrandsson, 2004). Modern trends based on good practice, based on professional and scientifically relevant indicators, promote foster care as one of the most desirable types of social protection, mainly due to different cause of the need for care.

Foster care, which has been standardized as a social protection right, is a result of the advancements made in social work theory and practice, both domestically and internationally. Preconditions were established in the Republic of Srpska for the development of foster care as the most effective form of protection for social protection beneficiaries who require placement for a variety of reasons or situations (Rakanović Radonjić, 2022a). This was done in an effort to improve the rights and services offered to beneficiaries under the motto "client in focus" in social protection. The main goal is to improve the quality of life of beneficiaries. One of the frequent reasons for taking care of older persons, using the model of foster care, is the lack of family care, which, as one of the results, also has insufficient economic opportunities for the older persons to live independently. Thus, foster care is one strategy that can be applied to help older persons stay in their communities and lessen individual poverty. Foster care can also be seen as a model or concept of long-term care for the older persons refers to the continuous help and support that older individuals receive when they are no longer able to independently perform daily activities due to aging, chronic illness, disability or cognitive impairment, or lack of family support (Rakanović Radonjić, 2022b). The most common reasons for placement of older persons in foster care are changes in the functional status of beneficiary, their living conditions, aging, deterioration of health, loss of certain functions, problems in family functioning, poverty, inadequate housing conditions, etc.

Normative assumptions offer a framework for work in the development of foster care for the older persons. The Republic of Srpska's Law on Social Protection (Official Gazette of the Republic of Srpska No. 32/12, 90/16, 94/19, 42/20, and 36/22) and the

Rulebook on Foster Care (Official Gazette of the Republic of Srpska No. 27/14) contain the normative framework that outlines the process and requirements for exercising the right to be cared for by a foster family. It also requires that the Social Welfare Center that provides services of social care must take into account the individual characteristics of the beneficiary when selecting the foster family in which care is provided, the housing and other possibilities of the family and the needs of the beneficiary (Article 1 of the Ordinance on Foster Care).

Foster care is an area of social protection for the older persons, which represents an alternative form of protection for older beneficiaries in social protection system. It is a dynamic field that changes in relation to the context in which it takes place, the needs of beneficiaries in a given context, and new scientific findings that create contemporary trends in foster care. A certain level of development of foster care directly depends on the professional capacities of Social Welfare Centers that are amenable for foster care, the system's readiness for foster care promotion, positive selection and training of foster families, and adequate system support for foster families and beneficiaries. There are very few foster homes for the older persons in the Republic of Srpska, and the majority of older persons that are in need for special services, are still placed in social welfare institutions.

THEORETICAL FOUNDATION OF FOSTER CARE FOR OLDER PERSONS – QUALITY OF LIFE AND INDIVIDUAL POVERTY REDUCTION AS A SOCIAL INVESTMENT STRATEGY

Observing foster care through the prism of system theory, whose founders are Pincus and Minahan (1973), it is important to note three types of systems that can help with details, emphasizing the fact that social work should be directed precisely at the system. These are informal or family systems consisted of families, friends, work colleagues, and other significant persons; formal systems such as some community groups; and social systems such as the safety of social welfare systems and other systems.

Authors of systems theory in social work warn that support systems are not always effective in supporting people, not only because they do not have the necessary resources, but also because people do not have favorable systems.

The stated goals of social work defined by Pincus and Minahan (1973) can be realized through four basic systems: the change-bearer system, which is usually made up of social workers and institutions/organizations in employment; the client's system, which is composed of individuals, groups, families, and communities who turn for help and are engaged

in working with the system of the change carrier; the target system represents the individuals that the change-bearer system weights to change; and the action system that is made up of individuals with whom the change-bearer system works to achieve its goals. System theory has found wide application in social work. According to Payne (2001; 2020), one of the main reasons that the systemic theory in social work has had a significant success is the fact that through this theory they analyze and accept another community, which exists, and analyze and reject them, as is the case with the radical theory (Šućur-Janjetović & Rakanović Radonjić, 2023).

Systems theory is important for understanding foster care as a concept of care that is implemented in multiple systems. From the standpoint of how the system theory operates, preservation can only exist if all of the systems that comprise it, operate in similar ways. In foster care, the change-bearer system, which includes the Social Welfare Center and professional workers, needs to have human resources that are professionally trained to work with foster families. This system can be considered both an action system and a component of the change-bearer system. The goal of the system from the aspect of system theory in foster care is the service user who is placed in the foster family and their family who should be enabled and empowered for the return of their member, with the help of the change-bearer system and changed system.

The system theory of foster care is also significant for the process of developing foster care, as it can answer questions about how to create activities and programs that will contribute to the growth of foster care in general or certain specific areas.

The term "quality of life" (QOL) has been frequently used over the past decades. Determining the definition of this concept is extremely challenging. In the 1970s, QOL as a concept started to be theoretically discussed (Kalfoss, 2010). Since the earliest discussions of this idea, more and more scientific fields have examined QOL as a pertinent component of their respective fields. There are more than 100 definitions of QOL, according to a review of the literature on the subject (Schalock, 2004). There are regional variations in the definition and application of QOL, and various authors modify it to suit their own needs based on their research objectives and areas of interest (Ilić et al., 2010). In this sense, social and psychological indicators were created to evaluate the quality of life of individuals and groups, while social indicators were created to evaluate the general population's quality of life in states, regions, or countries. The World Health Organization (WHO) established a committee to evaluate quality of life (WHOQOL, 1995), which is defined as an individual's subjective view of life in relation to standards, interests, aspirations, future prospects, culture, and value systems. The instrumental part used in this study for

data collection (questionnaires for beneficiaries placed in foster families, used with written authorization) includes portions of the WHOQOL questionnaire for evaluating quality of life. Some authors believe that this WHO-formed group provided the most comprehensive definition of quality of life because it is a broad concept that encompasses social relationships, economic independence, psychological and physical health, and relationships based on environmental characteristics (Ilić et al., 2010; according to WHOQOL, 1995 and WHO Division of Mental Health, 1993). According to Cummins (2000), quality of life is composed of seven dimensions: material well-being, health, productivity, intimacy, security, togetherness, and emotional well-being. Cummins also asserts that the subjective domains of quality of life are selected according to their importance to the individual. Cummins argues that the quality of life is composed of seven dimensions: material well-being, health, productivity, intimacy, security, togetherness, and emotional well-being. This author also asserts that the subjective domains of quality of life are selected according to their importance to the individual (Cummins, 2000).

Even though it is considered a basic concept, quality of life is crucial to foster care because it fulfils the concept's requirements, which helps foster care achieve its' goal. Although subjective sentiments are crucial for gauging the quality of life in foster care and for determining whether the goal of foster care has been met, they should be interpreted cautiously, particularly in light of the length of foster care and the time required for adaptation to new living circumstances.

Social investment refers to policies and practices designed to enhance the capabilities and opportunities of individuals, thereby fostering economic and social development. This strategy differs from conventional welfare models, which mostly offer temporary respite. The introduction of foster care for older persons is rooted in the principle of social inclusion. According to Dubois (2016), stable housing and social support are critical determinants of health and well-being. By providing foster care for older persons, the goal is to offer a family-like environment that promotes independence and social integration. This approach recognizes the importance of a supportive community in enhancing individual well-being and economic stability.

Social investment and foster care for older persons can generate significant economic benefits. By reducing reliance on costly institutional care and promoting workforce participation, these policies can alleviate public spending on social services. The implementation of foster care for older persons can lead to substantial cost savings for governments. The implementation of foster care for older persons can lead to substantial cost savings for governments. Institutional care is often expensive, and providing a family-like environment through foster care can be

a more cost-effective solution. Research has shown that adult foster care can reduce healthcare costs by improving the overall health and well-being of participants, thereby reducing the need for medical interventions (Greve, 2017).

Social investment strategies have been successfully implemented in a number of nations. For instance, Nordic countries have implemented comprehensive policies that support families, children, and the unemployed, leading to lower poverty rates and higher economic mobility (Morel et al., 2012). These policies include subsidized childcare, parental leave, and retraining programs for displaced workers. These investments have created a robust framework that addresses immediate needs and equips individuals with skills and opportunities to break the cycle of poverty. Germany and the Netherlands have embraced social investment by focusing on vocational training and continuous education for their workforce. These policies ensure that workers can adapt to changing economic conditions and remain competitive in the job market. By investing in education and training, these nations have seen reduced unemployment rates and increased social mobility (Eydal & Rostgaard, 2018).

COMPARATIVE ANALYSIS WITH SIMILAR SYSTEMS AND ADAPTED POLICY FOR REPUBLIC OF SRPSKA

Examples from other nations that have effectively applied social investment strategies through foster care programs for the older persons are included in the paper. This applies to the policies that include the United States, Great Britain, and the Nordic countries.

These countries offer helpful models that have been shown to be successful in reducing poverty, promoting social security inclusion, and ensuring life stability. However, certain legal, economic, and cultural factors must be considered for such politics to be implemented successfully in the Republic of Srpska regarding of the local context characteristics.

Cox highlights the significance of strengthening local support programs and user-friendly services as part of a community-oriented approach to social policy and services (McSweeney-Fild & Molinari, 2023). Additionally, Niles-Yokum and Wagner (2018) emphasize the idea of “aging in place”, which means assisting the older persons in their local communities and lowering the need for institutional care.

By educating and assisting foster families, Republic of Srpska can adopt the community support model, expanding access to social services for the older persons and lowering the demand for institutional housing. Such approach is possible taking into account the traditional intergenerational solidarity and the long history of family care in the Republic of Srpska, which goes back to the period since the Great War.

Foster families support

The absence of official support can cause stress and issues for foster families in countries like the US, where older persons depend on family assistance. Price et al. (2008) highlights the importance of providing training and resources for foster family members, as well as financial incentives for carers. Similarly, Niles-Yokum and Wagner (2018) provide examples of programs that offer financial incentives and tax breaks for foster families, which may further encourage the development of similar incentives for foster families in Republic of Srpska. Professional assistance is a crucial type of support in addition to financial assistance. Foster families should regularly receive this type of support so they can be trained, prepared for the process, and supported during the foster care process. Social Welfare Centers should offer this kind of ongoing support to foster families.

Framework adaptation and financial incentives for foster families

Nordic countries successfully combine subsidies for foster families and standardization of service quality to ensure equally accessible and high-quality services nationwide (Eydal & Rostgaard, 2018). Republic of Srpska adopted this model through mandatory training and certification of foster families with subsidies and support through clear legal regulations. The introduction of financial incentives, as seen in Germany and Nordic countries, would further attract families to participate in elder foster care (Morel et al., 2012). These programs could be supplemented with recommendations from Niles-Yokum and Wagner (2019), who emphasize the need for transparent and consistent regulations to ensure stable support for both beneficiaries and foster families. Although foreseen, this practice did not take place in the Republic of Srpska due to the lack of trained professionals who work in foster care services.

The legal framework pertaining to the population's social and family-legal protection has undergone substantial changes in the past ten years in the Republic of Srpska, bringing laws into compliance with international agreements that Bosnia and Herzegovina has ratified. The Republic of Srpska has a number of laws and ordinances that either directly or indirectly addresses foster care, which regulates it legally. The Republic of Srpska's highest law incorporates some of the provisions of international agreements pertaining to social protection or foster care. The most important documents that normatively regulate foster care are: Constitution of the Republic of Srpska, the Social Welfare Law and the Family Law. An essential secondary legal act that governs this area more thoroughly is the Ordinance on Foster Care; however, it has many flaws that require stricter legal regulation.

Quality standardization and service monitoring

Quality monitoring is crucial for service consistency across all levels of social protection. In Denmark, for example, regular evaluations ensure a high quality of services for the older persons (Esping-Andersen, 2002). Cox (2005) emphasizes that standardization and monitoring improve social security for the older persons. Similarly, Niles-Yokum and Wagner (2018) highlight the importance of implementing periodic evaluations to ensure continuity in service quality and effectiveness. Republic of Srpska could implement similar evaluations through procedures in Social Welfare Centers to monitor conditions in foster families and ensure equal support for beneficiaries. The most important documents that normatively regulate foster care are: Constitution of the Republic of Srpska, the Social Welfare Law and the Family Law. An essential secondary legal act that governs this area more thoroughly is the Ordinance on Foster Care; however, it has many flaws that require stricter legal regulation.

Raising awareness and social inclusion

In the USA, initiatives to increase public awareness of the benefits of foster care help expand this form of support (National Council on Disability, 2015). Similarly, Republic of Srpska could organize campaigns promoting foster care for older persons, highlighting positive examples and the benefits it brings to both beneficiaries and foster families, thereby reducing stigma and increasing acceptance of this form of support. Niles-Yokum and Wagner (2018) also suggest campaigns aimed at raising awareness of the benefits of community care for the older persons which could serve as a model for designing educational initiatives in Republic of Srpska. Research conducted in Republic of Srpska showed that the older persons decide on institutional care precisely because of inadequate information about the possibilities of foster care (Rakanović Radonjić, 2022a).

By adapting these policies and practices, Republic of Srpska can gradually improve its foster care system for the older persons, drawing on the experiences of other countries and tailoring them to the specific needs and resources of the local community. This approach enables the long-term sustainability of the program and contributes to the improvement of the quality of life and social inclusion of older persons in Republic of Srpska.

Due to the aging of the population and family care crises, Republic of Srpska has a great care need for older persons. This can be argued by the fact that in the previous three years, over 1,200 older persons were placed only in the institutions for social protection established by the state. (Government of Republic of Srpska, 2024). Over 2/3 of older persons are placed in these institutions as beneficiaries of social welfare system.

Case studies and evidence

In the United States of America, the “Shared Living” model serves as an example of foster care for older persons. This program matches older persons with disabilities with host families who provide long-term care and support. Research indicates that participants experience improved quality of life and greater community integration compared to traditional institutional care (National Council on Disability, 2015).

The United Kingdom’s “Adult Placement Scheme” offers a similar approach, targeting older persons and those with mental health issues. Studies suggest that participants benefit from personalized care, increased social interaction, and enhanced well-being (Department of Health and Social Care, 2021, 2023).

Other countries have also explored innovative social investment and adult care models. For instance, Japan’s “Foster Family System for the older persons” pairs older individuals with families who provide care and support in exchange for a stipend. This system has reduced the burden on nursing homes and allowed the older persons to live in a more familial environment, improving their overall quality of life (Horioka, 2010).

The “Home Care Service” model, which has been successful in lowering hospitalization rates and improving the mental health of older persons by preserving their independence and social ties, provides complete assistance for this group of beneficiaries in Denmark, allowing them to stay in their homes while receiving the care they require (Esping-Andersen, 2002).

METHODOLOGY

The data presented in the paper were obtained as part of a larger previous study that was carried out in the entire territory of the Republic of Srpska with the aim of determining the characteristics of foster care.¹ The study included foster care for children, foster care for adults

¹ As part of the research for the author Andrea Rakanović Radonjić’s (2022a) doctoral dissertation, “Characteristics and development of foster care in the Republic of Srpska”, presented results are the integral part of the study are presented. The subject of doctoral dissertation was research of foster care elements in the Republic of Srpska with the aim of mapping the current foster care situation in the Republic of Srpska, and identifying the development potential of foster care. Data collection were based on using quantitative and qualitative research methods (survey questionnaire specifically designed for each subgroup of research participants and a focus group interview), examining professional workers, foster families and beneficiaries (children and adults including older persons). In this paper will be presented only part of results obtained from older beneficiaries of foster care.

and the older persons. The research was conducted over a period of 1.5 years (from mid-2020 to 2022).

In the empirical part of the research, the population consisted of foster families who have beneficiaries of the right to foster care in the accordance with the Republic of Srpska's Law on Social Protection (Official Gazette of the Republic of Srpska No. 32/12, 90/16, 94/19, 42/20, and 36/22). In the period when the research was conducted, the population of foster families for older persons in the Republic of Srpska consisted of 95 families in which 111 beneficiaries were placed. The sample consisted of 63 foster families and 65 beneficiaries of foster care. During sampling, the quality of the sample was ensured, in medium samples, numbering from 30 to 100 respondents (Stojšin & Vidicki, 2020; Turner, 2006).

The paper was prepared using a variety of general scientific methods, including statistical, hypothetical-deductive, analytical-deductive, and comparative methods. Among the fundamental scientific techniques, the paper was prepared using the methods of analysis and synthesis, induction and deduction, as and generalization.

The research involved examining the attitudes of older persons in foster care using a specially designed instrument questionnaire. Parts of WHO-QOL-BREEF, the World Health Organization's questionnaire for evaluating the quality of life of adults and the older persons, were used as an essential component of the survey. The consent of the WHO was obtained for the use of this instrument. The sample consisted of 64 older persons placed in foster families in the Republic of Srpska.

RESEARCH RESULTS

Results presented in this paper were not presented in the original study, with exception of results that refer to sociodemographic characteristics. The analyzed data obtained by the method of examination and content analysis showed as follows.

Nineteen local communities have registered foster families for older persons. The largest percentage of foster families for older persons (79.4%) resides in rural and suburban areas. Among the other sociodemographic characteristics that were explained earlier, the following stand out:

- The gender distribution of foster caregivers is 60% female, opposite 40% male foster caregivers.
- In relation to age, foster caregivers predominantly belong to the group of people aged 56 to 65.
- The educational structure of foster caregivers is not favorable for the development of foster care. As many as 34.9% are unqualified foster caregivers, while 52.4% are foster caregivers with secondary professional education.

- 2/3 of foster caregivers for older persons are not employed (73%).
- In the largest percentage, foster families for older persons are complete families (63.5%).

57.1% of foster families are related to the older individuals who are placed in foster care. The largest number of foster families for older persons received information about foster care in Social Welfare Centers (88.9%). Regarding the motivation for continuing foster care after the need to care for beneficiaries who are currently in a foster family ends, 52.38% of foster caregivers declared that they would not continue to provide foster care for other beneficiaries.

Beneficiaries, that were in a sample of older persons placed in foster care, were asked to make subjective assessment of satisfaction with the quality of life in the following aspects: health (physical and mental); social relations and the environment, including the availability of services. The mean values of the answers regarding the aforementioned facets of the quality of life of older persons in foster care are displayed in Table 1.

The mean value of the answer related to the overall quality of life is 3.06. Older persons in foster care evaluated their overall quality of life with a mean score of 2.91, which is marginally less than the sum of the individual evaluated aspects, as can be seen from the presented mean values.

The older persons evaluated the following aspects of *physical health-related quality of life*: daily activities; the need for medications and medical equipment; energy and fatigue, or how tired they are; their own mobility; pains during rest and sleep; and their own assessment of their ability to perform daily tasks. Regarding the responses obtained, the question concerning preventing the beneficiaries' pain from preventing them from performing their daily tasks had the highest mean value (3.33), whereas the questions concerning mobility and mobility had the lowest mean value (2.61).

Among the lowest mean scores for individual aspects, the quality of life component pertaining to the *mental health* of older persons in foster care received a mean score of 2.85. This aspect was projected with the following variables: self-assessment, personal beliefs, positive and negative emotions, memory and concentration, and satisfaction with body image and appearance. According to over half of the respondents, they frequently experience fear, grief, or sadness. The ability to enjoy life question had the lowest mean score in this category (2.45). These findings unequivocally show that older persons in foster care require psychosocial support in addition to other components.

Table 1: Mean values of answers in relation to defined aspects of quality of life.

	N	Min	Max	Med	St.D.
Physical health	64	1	5	2.87	1,184
Mental health	64	1	5	2,85	1,210
Social relations	64	1	5	3,14	1,123
Environment and social services	64	1	5	3,55	1,017
General assessment	64	1	5	2,91	1,094
Total				3.064	1,112
Valid N (listwise)	64				

Within the *social ties* aspect of the quality of life, personal relationships with close people (3.20) were evaluated with the highest average score, while the lowest average value was recorded on the question of satisfaction with intimate life (2.61). These results suggest that relationships with close individuals are maintained in foster care, which should undoubtedly be seen as a resource that can be utilized for various objectives. The second finding aligns with the respondents' data, which revealed that more than 70% of the sub-sample was single, most frequently as a result of divorce or the death of a spouse or partner.

Safety and security, health and social care (quality and availability), the family environment, information access opportunities, the physical environment (noise, pollution, traffic), and transportation were the final projected aspects of quality of life that were related to the *environment and service availability*. The foster family and the local community are the primary resources that contribute to the quality of this aspect of life, so it is not surprising that this aspect received the highest average score of 3.55. A mean score of 3.97 was obtained for the question about beneficiaries' satisfaction with their stable living conditions. The rating of satisfaction with medical and social care services showed a minor discrepancy (3.94). Beneficiaries' satisfaction with their available funds received the lowest mean score, 3.23, which is much lower than the average life scores and scores for every other process. The results indicate that the older persons do not have sufficient funds available to them, which may be directly related to the funding of the foster care. Regardless of these findings, it was determined that older persons in foster care typically lacked the

financial resources necessary to meet their basic needs, meaning they were unable to do so with the money they had before placement in foster families.

DISCUSSION

The implementation of foster care for older persons in the Republic of Srpska faces specific challenges that are partially due to the legal, institutional, and cultural context. Although a formal framework for social protection exists, numerous obstacles limit the development of foster care for the older persons as an efficient and sustainable support system. In the Republic of Srpska, jurisdiction over social protection is decentralized, leading to different approaches and resources at the local community level. The lack of clearly defined standards and regulations, as well as appropriate quality control mechanisms, makes it difficult to provide consistent support for the older persons in foster care. Furthermore, the role of Social Welfare Centers in the Republic of Srpska is crucial for the implementation of foster care for the older persons, but it faces significant limitations in terms of training and available resources. A shortage of trained professionals and financial resources, along with insufficiently developed training programs for foster families, reduces the capacity of centers to respond to all beneficiaries needs. According to one research findings (Ilić et al., 2010), limited resources in Social Welfare Centers result in reduced service availability, while a lack of trained professionals diminishes the quality of provided support. This indicates the need for additional investment in human and material resources to ensure adequate support for older individuals in foster families.

In addition to legal and institutional obstacles, cultural and social attitudes also affect the acceptance of foster care for the older persons as a form of social protection. In a culturally traditional environment such as the Republic of Srpska, it is expected that families care for their older members, while placing the older persons in foster families is often seen as an unconventional approach. As a result, there is a potential for stigmatization of both beneficiaries and foster families, which can negatively impact their social integration and quality of life. Raising awareness of the benefits of foster care and educating the community about the possibilities this system offers can help reduce stigma and increase program support. Taking into account the essence of the "client in focus" concept, here we should emphasize the importance of the individual decision of the older persons and their right to choose whether they want to live in their own home, an institutional setting, foster care or other arrangements. In order for an older person to individually decide that foster care is the best form of care, they must be adequately informed about all the advantages, but also the risks of foster care as a form of potential long-term care.

As the results show, even in the category of foster families, this kind of approach can be the path to reduce individual poverty, because foster care givers are mainly unemployed, and by providing foster care, they become financially independent (in most cases).

Practical examples from local community practice, regardless the limitations, can contribute to a better understanding of the challenges and potential for the development of foster care for the older persons in the Republic of Srpska. This can be seen from presented results. For the development of a foster care system for the older persons in the Republic of Srpska, clear recommendations are needed regarding relevant (social) policies and practices. The government and Social Welfare Centers could develop initiatives for additional training and employment of social workers, as well as financial support programs for foster families, to guarantee the quality of all services and accomplish the efficient involvement of all foster care subsystems, which will improve the beneficiaries' quality of life. By introducing standardized quality of service guidelines and mandatory periodic evaluations, it could be ensured that foster care programs meet the needs and expectations of both beneficiaries and foster families. Continuous monitoring and evaluation of these programs, as well as gathering feedback, would enable the improvement of the foster care system for the older persons in the Republic of Srpska and contribute to achieving social policy goals in the field of protection for older persons. The above-presented results suggest that older persons in foster care rate aspects of the quality of life with positive mean values, which is a direct proof that foster care as a form of protection can fulfill its purpose.

CONCLUSION

Formal determination of the social protection system in the Republic of Srpska for the development of foster care, as one of the functional and desirable systemic mechanisms for the protection of older persons exists, while the essential commitment can still be questioned.

In order to successfully implement the foster care model for older persons, governments must develop robust support systems for foster families, including training and financial incentives. Moreover, establishing clear regulatory standards and monitoring mechanisms can ensure the quality and consistency of care and support. According to Greve (2017) it is essential to conduct rigorous evaluations of foster care for older persons programs to assess their impact and identify areas for improvement. Continuous monitoring and feedback can help refine these programs, ensuring they meet the needs of beneficiaries and foster families effectively.

Through the lenses of the theoretical framework of systems theory, this paper examines the potential of foster care for the older persons as a strategy to improve quality of life and reduce individual poverty through social investments. Theoretical perspectives on systems by Pincus and Minahan (1973) emphasize the importance of synergy between different systems – formal, informal, and social – in providing support to older individuals. These systems must be interconnected and supported with adequate resources to function successfully in the context of foster care for the older persons.

One of the findings of this paper is the need to improve the social protection system in the Republic of Srpska to make foster care for the older persons a sustainable support option, because of its potential for ensuring QOL and individual poverty reduction, not only for beneficiaries, but for foster care givers. The aforementioned could be achieved through development of a support system that includes social worker training, financial incentives, and standardized guidelines to enable foster families to provide adequate and quality care for older beneficiaries.

Cultural and social attitudes regarding the care of older individuals in foster families pose an additional obstacle to implementing this system and model of care for older persons in Republic of Srpska. Traditional expectations that families take responsibility for caring for their older members contribute to the stigmatization of users and foster caregivers, which can negatively affect the social integration and quality of life of beneficiaries. Educational campaigns promoting the benefits of foster care for the older persons, as well as broader community engagement, can help overcome these barriers and contribute to a more positive acceptance of this form of social support.

Practical examples from other countries, such as the USA, the UK, and Nordic countries, showcase successful social investment models based on supporting beneficiaries through stable housing, economic security, and social inclusion. These models serve as inspiration for developing similar policies and programs in the Republic of Srpska, tailored to local needs and specificities.

For the Republic of Srpska, it is important to establish a clear legal framework and institutional support that enables continuous monitoring, evaluation, and improvement of foster care for older persons. The government and relevant institutions, including social work centers, should consider introducing incentive mechanisms, training, and empowerment programs for foster families, as well as periodic service quality assessments. Through such measures, foster care for older persons can become a key element of the social protection system, providing long-term support to beneficiaries, contributing to poverty reduction and quality of life improvement.

SKRBNIŠTVO ZA STAREJŠE: MODEL ZA ZAGOTAVLJANJE KAKOVOSTI ŽIVLJENJA IN ZMANJŠEVANJE REVŠČINE POSAMEZNIKOV

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POVZETEK

Rejništvo za starejše osebe je oblika storitve, ki je vključena v sistem socialnega varstva Republike Srbije. Za razliko od rejništva otrok, ta oblika ni tako uveljavljena tudi v drugih državah. Raziskava o rejništvu kot neinstitucionalni obliki zaščite starejših oseb je bila izvedena v Republiki Srbski, in sicer z uporabo kvalitativnih in kvantitativnih metod. Vzorec je vključeval strokovne delavce, rejnike in upravičence do storitve. Cilj raziskave je bil ugotoviti trenutne razmere v rejništvu v Republiki Srbski in opredeliti razvojne možnosti rejništva. Predstavljeni rezultati kažejo na smer razvoja rejniške dejavnosti v Republiki Srbski kot alternativnega modela socialne zaščite starejših ljudi, ki potrebujejo bivališče in oskrbo v starosti. Namen tega članka je pokazati, kako lahko ta model zagotovi ustrezno raven kakovosti življenja starejših ljudi. Cilj je tudi prikazati potencial strategij socialnih naložb z uvedbo rejništva kot sredstva za zmanjšanje revščine. Podatki, predstavljeni v tem prispevku, so bili zbrani s kvantitativnimi in kvalitativnimi raziskovalnimi metodami v večji študiji. Podatki so pokazali, da je kakovost življenja starejših v rejništvu subjektivno bolj zadovoljiva in da je njihovo dožemanje osebne revščine boljše kot pred namestitvijo.

Ključne besede: rejništvo, starejši ljudje, socialno delo, kakovost življenja, zmanjšanje individualne revščine, Republika Srbska

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APPLICAZIONE DELL'APPROCCIO BASATO SULL'USO (USAGE-BASED APPROACH): INDAGINE SULLA COMMUTAZIONE DI CODICE DEGLI ITALOFONI ISTRIANI

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SINTESI

In virtù della natura dinamica e adattabile della commutazione di codice dei parlanti bilingui istriani, l'obiettivo del contributo è indagare gli aspetti alla base dell'elaborazione e della produzione delle sequenze linguistiche commutate, focalizzando l'attenzione in particolare sulla concettualizzazione, frequenza, accessibilità, somiglianza e adattamento dei costrutti linguistici in specifici co(n)testi d'occorrenza, nonché sugli scopi e sulle funzioni pragmatiche.

Parole chiave: Discorso bilingue, corpus di lingua parlata, campionatura del linguaggio, commutazione di codice, TalkBank, Usage-Based Approach

APPLICATION OF THE USAGE-BASED APPROACH: INVESTIGATION OF CODE-SWITCHING AMONG THE ISTRIAN ITALOPHONE SPEAKERS

ABSTRACT

Taking into consideration the dynamic and adaptable nature of code-switching of the Istrian bilingual speakers, the objective of this paper is to investigate the aspects underlying the processing and production of switched linguistic sequences, focusing in particular on conceptualization, frequency, accessibility, similarity and adaptation of linguistic constructs in specific contexts, as well as pragmatic purposes and functions.

Key words: Bilingual speech, spoken language corpus, language sampling, code-switching, TalkBank, Usage-Based Approach

INTRODUZIONE¹

La commutazione di codice (o *code-switching*) rappresenta una forma dinamica di alternanza linguistica che coinvolge due o più varietà linguistiche all'interno di un singolo atto comunicativo (Milroy & Muysken, 1995), a livello interfrasale o intrafrasale (Deuchar, 2012), e costituisce un fenomeno ampiamente pervasivo del comportamento linguistico bilingue/plurilingue nell'ambito della "modalità conversazionale bilingue" (Grosjean, 1998), quale fenomeno tipicamente adottato nei contesti diglossici di contatto linguistico, contrassegnati dal rapporto di complementarietà gerarchica e differenziazione funzionale delle varietà linguistiche in questione (una considerata alta e l'altra bassa), come accade nell'ambito della realtà (doppiamente) diglossica, ovvero imperfettamente poliglossica caratterizzante il repertorio linguistico dei locutori italo-foni istriani² (Blagoni, 2007; Blagoni et al., 2016; Filipi, 1989a; 1989b; Milani Kruljac, 1990; Scotti Jurić, 2003).

Varie asserzioni della commutazione di codice sono state prese in considerazione in prospettiva diacronica, adottando approcci teorici e metodologici differenti, applicati a realtà bilingui/plurilingui diversificate.³ Sebbene siano stati sviluppati numerosi modelli esplicativi sulla commutazione di codice in contesti bilingui e plurilingui eterogenei in prospettiva diacronica, la conciliazione teorica e metodologica tra i risultati empirici da essi derivati si è rivelata particolarmente difficoltosa e complessa, siccome è in linea di massima riconducibile da un lato alla divergenza nelle unità di analisi adottate (ad es. unità sintattiche vs. unità discorsive), dall'altro, alla differente

impostazione epistemologica dei modelli (es. approcci strutturali vs. approcci socio-pragmatici). Un esempio emblematico di questa complessità riguarda ad esempio il divario tra l'impostazione degli studi come quelli di Poplack (1980) e Myers-Scotton (1993a), che si sono concentrati sull'identificazione di vincoli strutturali alla commutazione di codice, nonché l'approccio interazionista di Auer (1991; 1995; 1998; 1999; 2005), che d'altro canto ha messo in discussione l'idea che la commutazione possa essere ridotta a mere regolarità strutturali, sottolineando invece la sua dimensione conversazionale e pragmatica. Questi due filoni di ricerca, pur avendo prodotto risultati empiricamente rilevanti, risultano difficilmente integrabili, poiché partono da assunti teorici diversi e adottano metodologie di analisi non sempre sovrapponibili (cfr. Gardner-Chloros, 2010). Questa frammentazione teorica evidenzia la necessità di approcci che possano combinare l'analisi strutturale con una prospettiva orientata all'uso, come avviene nell'Approccio Basato sull'Uso (Tomasello, 2003; Bybee, 2010).

Le principali prospettive teoriche possono essere approssimativamente suddivise in due gruppi, a seconda se implicano o meno i meccanismi aggiuntivi per gestire i dati linguistici misti (Parafita Couto et al., 2021): gli approcci basati sui vincoli cercano di spiegare l'occorrenza della commutazione di codice supponendo l'esistenza di specifici prerequisiti. Tra i più rilevanti annoveriamo l'*Equivalence Constraint Model*⁴ e il *Free Morpheme Constraint*⁵ di Poplack (1980), il *Government Constraint*⁶ di DiSciullo, Muysken, e Singh (1986), il *Functional Head Constraint*⁷ di Belazi, Rubin e Toribio (1994).

- 1 La ricerca è stata supportata e finanziata dalla Fondazione Croata per la Scienza, nell'ambito del progetto scientifico *Approccio multilivello all'analisi del discorso nello sviluppo del linguaggio* [Multilevel Approach to Discourse in Language Development] (UIP-2017-05-6603).
- 2 La Regione istriana/Istarska Županija è una regione statutariamente bilingue in cui il bilinguismo ufficiale croato-italiano è riconosciuto de jure ed è presente de facto in numerose aree contrassegnate dalla presenza storica della comunità italo-fona, ossia la Comunità Nazionale Italiana autoctona (Milani Kruljac, 1990). La variante linguistica più comune e usuale del repertorio degli italo-foni istriani è l'istoveneto, un dialetto con alta vitalità etnolinguistica che nel diasistema italo-fono rappresenta la varietà bassa (accanto alla lingua italiana – varietà alta). L'istoveneto, varietà diatopica del dialetto veneto, si è diffuso nella penisola istriana come koinè/lingua franca nell'ambito dei stretti rapporti con la Serenissima e ha gradualmente soppiantato le varietà romanze autoctone (pre-veneziane). Per i membri della Comunità Nazionale Italiana l'istoveneto rappresenta la lingua madre (L1) e il principale mezzo di identificazione etnolinguistica, della memoria generazionale e della storia del patrimonio etnico.
- 3 Inizialmente le indagini erano frequentemente inserite all'interno dei paradigmi linguistici strutturalisti e poi quelli generativi. Gli approcci sociolinguistici alla commutazione di codice, successivamente subentrati, concepiscono la commutazione come un comportamento linguistico sistematico, regolato da precisi canoni (Weinreich, 1953), e concentrano l'attenzione sulle motivazioni sociali e sulle funzioni dell'alternanza linguistica, evidenziando il ruolo determinante del contesto nel plasmare i modelli di commutazione, focalizzandosi sulle dinamiche sociali e sulle funzioni pragmatiche dell'atto di cambiare lingua durante l'interazione conversazionale (Gumperz, 1982).
- 4 Il Modello *Equivalence Constraint* presuppone l'esistenza di un rapporto di equivalenza proponendo che le commutazioni linguistiche avvengano nei punti in cui ambedue le lingue hanno delle similitudini strutturali.
- 5 Secondo il *Free Morpheme Constraint* la commutazione di codice non può avvenire tra una radice lessicale libera e un affisso legato, a meno che la radice non sia già assimilata fonologicamente nella lingua dell'affisso. (es. non sarebbe possibile mescolare una radice italiana con una flessione verbale croata se la radice non segue le regole fonologiche del croato).
- 6 Il vincolo *Government Constraint* esplica che la commutazione di codice sia limitata dalle relazioni di governo sintattico, ovvero può avvenire solo in punti della struttura in cui non vi sia una dipendenza gerarchica forte tra gli elementi coinvolti (es. la commutazione è più probabile tra frasi coordinate piuttosto che tra testa e complemento).
- 7 Il *Functional Head Constraint* presuppone che la commutazione di codice sia proibita tra una testa funzionale (come un determinante, un ausiliare o una congiunzione) e il suo complemento, poiché le teste funzionali impongono restrizioni categoriali sulla selezione del loro complemento, rendendo instabile l'alternanza di lingua in quei punti della struttura (es. non si potrebbe mescolare una preposizione in una lingua con il suo sintagma nominale in un'altra).

Ben presto tali prospettive sono state messe in discussione e sono emerse conferme empiriche contraddicenti l'esistenza di molti dei vincoli annoverati (Bentahila & Davies, 1983), spianando la strada a una corrente successiva di riformulazione degli stessi (Deuchar, 2005; MacSwan, 1999; 2000). Il coinvolgimento asimmetrico delle lingue coinvolte ha portato alla postulazione del Modello della Matrice Linguistica (*Matrix Language Framework*) e del Modello della Marcatura (*Markedness Model*) di Myers-Scotton (1993b).⁸ Ci sono poi stati ulteriori sforzi per cercare di conciliare le spiegazioni strutturali con le funzioni socio-pragmatiche insite nel processo di commutazione, rilevando l'importanza del ruolo ricoperto dall'elaborazione dei fattori sociolinguistici (Chan, 2009). In questo contesto vengono identificati quattro tipologie di commutazione di codice proposte da Muysken (2000; 2013) che rivelano diversi livelli di contributo delle due lingue, tenendo conto di fattori influenzanti l'esito, tra cui la distanza tipologica, le norme comunitarie, ecc., ossia l'inserimento (di elementi singoli), l'alternanza (la giustapposizione di materiale linguistico proveniente da lingue diverse), la lessicalizzazione congruente (commutazioni più frequenti laddove si verifica maggiore condivisione strutturale) e il *backflagging* (l'uso di marcatori periferici di clausola dell'altra lingua) (Parafita Couto et al., 2021). Sulla stessa scia, Bhatt e Bolonyai (2011) hanno postulato la Teoria dell'Ottimalità, identificando un repertorio di funzioni socio-pragmatiche (es. l'affiliazione sociale, l'espressione del medesimo concetto in modo più economico, ecc.) che permetterebbero di prevedere la comparsa della predilizione per determinati elementi commutati (Parafita Couto et al., 2021). In ultima istanza, per analizzare la struttura della commutazione di codice è stato proposto l'Approccio

Basato sull'Uso (Usage-Based Approach) (Tomasello, 2003; Backus, 2015), che premette l'influenza delle funzioni pragmatiche di specifiche forme linguistiche e di specifici aspetti legati all'uso linguistico concreto. Nella presente indagine si è cercato di riflettere sul funzionamento della commutazione di codice nell'ambito dell'italofonia istriana, applicando il suddetto approccio metodologico, con l'intento di contribuire a una comprensione più approfondita del comportamento linguistico bilingue, enfatizzando la natura adattiva della fenomenologia di contatto linguistico nel contesto diglossico istriano.

CORNICE TEORICA: L'APPROCCIO BASATO SULL'USO COME APPROCCIO ALLO STUDIO DELLA COMMUTAZIONE DI CODICE

L'approccio metodologico basato sull'uso parte dal presupposto che: "il sistema linguistico del parlante si basa fondamentalmente sugli 'eventi d'uso', ovvero sulla produzione o percezione del linguaggio da parte del parlante" (Barlow & Kemmer, 2000, VIII),⁹ mettendo in evidenza l'importanza dell'esperienza linguistica concreta e del contesto sociale interazionale nel plasmare il processo di acquisizione e produzione linguistica¹⁰. L'approccio è radicato nella cornice teorica e sperimentale-metodologica della linguistica cognitiva (Goldberg, 1995) e della psicologia dello sviluppo (Theakston & Lieven, 2017; Tomasello, 2003). Fondamentalmente l'approccio fornisce una lente attraverso cui esplorare come le esperienze linguistiche plasmino le rappresentazioni mentali e i modelli di utilizzo delle strutture linguistiche, respingendo la concezione della conoscenza linguistica come immagazzinata in moduli mentali distinti, ma considerandola come

8 Il Modello della Matrice Linguistica implica che durante la commutazione di codice una lingua funge da "matrice linguistica", ossia la lingua che fornisce la struttura grammaticale, mentre l'altra fornisce il contenuto. Il Modello della Marcatura estende la concezione della matrice linguistica e presume la distinzione, la (non) marcatezza delle varietà linguistiche in questione nell'ambito della lingua matrice (scelta di applicazione della commutazione linguistica sarebbe pertanto influenzata dalla marcatura della lingua matrice, ossia, gli elementi marcati attiverebbero più frequentemente il processo della commutazione).

9 Si riporta di seguito la versione originale del testo in inglese: "the speaker's linguistic system is fundamentally grounded in 'usage events', i.e., a speaker producing or perceiving language" (Barlow & Kemmer, 2000, VIII).

10 L'applicazione dell'approccio si è rivelata particolarmente proficua nell'ambito della linguistica acquisizionale (Tomasello, 2003; Abbot-Smith & Tomasello, 2006; Tomasello et al., 2007; Keren-Portnoy, 2006; Bates & MacWhinney, 1989; Street & Dąbrowska, 2010), siccome è possibile dimostrare empiricamente gli influssi esistenti tra il cosiddetto *child-directed input* e l'*output* del discorso infantile (Cameron-Faulkner et al., 2003; Lieven et al., 2009), nonché indagare longitudinalmente lo sviluppo di quest'ultimo (Lieven et al., 1992; 1997; Dąbrowska & Lieven, 2005). Si considera infatti che il graduale processo di acquisizione linguistica (dai modelli lessicali completi alla deduzione di schemi, per poi passare alla produttività), come il risultato di meccanismi generali universalmente condivisi, soggetti all'influsso degli schemi e delle convenzioni interazionali socialmente dettate (Tomasello, 2003) giochi un ruolo rilevante nell'ambito dell'osservazione dei modelli e degli esiti dell'acquisizione linguistica monolingue in primis (Behrens, 2009; Tomasello, 1999; 2015; Bates & MacWhinney, 1989; Street & Dąbrowska, 2010; Tomasello et al., 1997), ma offre anche preziosi spunti metodologici per lo studio dell'acquisizione bilingue e plurilingue, in particolare per quanto riguarda le relazioni tra input linguistico e realizzazione dei pattern linguistici. Nello specifico, la frequenza rilevata nell'*input* (ossia la quantità di esposizione a determinate strutture linguistiche) è strettamente correlata alla frequenza riscontrata nell'*output*, ovvero alla probabilità che un parlante riproduca quelle stesse strutture nel proprio uso linguistico. Questo principio è alla base della teoria della distribuzione della frequenza, secondo cui gli schemi grammaticali più frequentemente riscontrati nell'*input* tendono a stabilizzarsi e a generalizzarsi nell'acquisizione della lingua. Inoltre, la frequenza d'uso guida i processi di elaborazione dei *chunks* linguistici, ovvero delle unità lessicali e sintattiche memorizzate come blocchi pre-strutturati, che progressivamente servono come base per il riconoscimento di schemi più complessi. Questi *chunks*, inizialmente appresi come entità fisse, vengono successivamente analizzati e rielaborati dai parlanti per costruire nuove combinazioni linguistiche, contribuendo così allo sviluppo della competenza produttiva (Gaskin et al., 2022).

un'entità costruita attraverso l'esperienza linguistica, respingendo pertanto l'idea del linguaggio come un insieme statico di regole ma concependolo piuttosto come un'entità fluida, intrinsecamente dinamica e in costante evoluzione, che si evolve attraverso l'uso effettivo, anziché sottomettersi a rigide regole linguistiche (Croft, 2001). Pertanto, il suddetto approccio si distanzia dai "moduli" tradizionali della linguistica descrittiva dei fenomeni di contatto a livello fonologico, morfosintattico, lessicale e pragmatico, premettendo che la competenza linguistica di ogni singolo locutore sia composta da una specie di 'inventario' di accoppiamenti strutturali-semantici, che combinano una forma e un significato (*meaning-form pairings*), secondo la concezione saussuriana del segno linguistico (Hakimov & Backus, 2021), intesi come unità di senso (Langacker, 1987), il che consente la presenza di potenziali inflessioni nell'ambito di determinati punti specifici da un punto di vista semantico o funzionale (Bybee, 2010). Come evidenziato da Hakimov e Backus (2021), i significati possono variare dalle funzioni grammaticali specifiche ai contenuti complessi, e da significati referenziali a particolari sfumature pragmatiche. Pertanto, esplicitando la relazione tra funzione (o 'significato'), struttura (o 'forma') ed elaborazione (o 'uso'), il suddetto approccio richiede e consente un'integrazione di diverse prospettive (Backus, 2015; 2020; Hakimov, 2017), fornendo un'alternativa alle analisi puramente strutturali e riformulando le spiegazioni strutturaliste come derivate da considerazioni sociali o/e cognitive (Hakimov & Backus, 2021).

Per quanto concerne lo studio della commutazione di codice nell'ambito degli scambi interazionali bilingui, la prospettiva dinamica dell'Approccio Basato sull'Uso si rivela particolarmente significativa, siccome i parlanti bilingui attingono a un repertorio linguistico dinamico, che risulta essere modellato dalle loro esperienze in ambedue le lingue e dall'uso concreto delle stesse, ovvero l'intera esperienza linguistica risulta essere influenzata da fattori cognitivi, sociali ed esperienziali (Croft, 2001). Si premette pertanto l'importanza dei modelli di utilizzo, dei meccanismi cognitivi e dei fattori sociali nella configurazione del comportamento linguistico dei locutori bilingui nella modalità discorsiva bilingue (Grosjean, 1998), osservato in virtù della sua dinamicità e adattività, plasmata dall'esperienza e dall'utilizzo, siccome la commutazione di codice non

rappresenta una successione casuale di alternanza linguistica, bensì un fenomeno motivato cognitivamente, forgiato mediante complessi procedimenti di concettualizzazione e suddivisione in blocchi o unità lessicali, implicante la selezione strategica degli elementi linguistici in virtù del contesto sociale e delle funzioni pragmatiche. In altre parole, la commutazione di codice non viene considerata soltanto nel suo assetto cognitivo, bensì nella sua dimensione di strumento sociale e pragmatico che agevola un'interazione efficace in specifici contesti.

Nell'ambito dell'indagine della commutazione di codice, l'Approccio Basato sull'Uso tende a focalizzare l'attenzione sulla concettualizzazione nell'uso e nelle esperienze linguistiche bilingui per modellare le scelte linguistiche (Rodriguez & Chen, 2023), sugli effetti di frequenza¹¹ e accessibilità di determinate unità/strutture linguistiche, nonché sull'incidenza dei modelli di utilizzo sulla scelta della lingua (Garcia & Chang, 2022). Vengono inoltre valutati gli scopi e le funzioni pragmatiche della commutazione di codice nell'ambito delle situazioni interazionali (Chen & Gomez, 2021), ossia inerenti ai modelli cognitivi che emergono dal processo graduale di elaborazione, generalizzazione e schematizzazione delle informazioni pragmatiche in riferimento all'appropriatezza d'uso delle unità linguistiche (Wasserscheidt, 2021). Un terzo punto focale dell'approccio concerne la dimensione della somiglianza tra i costrutti linguistici nelle due lingue implicate e il loro riconoscimento nel corso del processo di utilizzo linguistico (Bybee, 2010). Tale aspetto dell'uso linguistico risulta essere ancora poco esplorato, nonostante rappresenti un aspetto molto rilevante nella comparsa e nello sviluppo della competenza comunicativa. Infatti, nell'ambito della linguistica del contatto, la lunga tradizione empirica ha rivolto la propria attenzione a questioni di equivalenza e somiglianza interlinguistica, con l'obiettivo di indagare le circostanze, le motivazioni e i punti in cui si manifesta l'influsso reciproco delle lingue in questione (Poplack, 1980; Myers-Scotton & Jake, 1995). Pertanto, l'applicazione dell'Approccio Basato sull'Uso nelle ricerche della fenomenologia di contatto linguistico possono fornire spunti innovativi sul ruolo giocato dalla similarità nell'ambito dell'emergenza e dello sviluppo della competenza linguistica (Hakimov & Backus, 2021), ai fini di un contributo alla riflessione

11 Uno dei principi cardine del suddetto approccio è legato infatti al ruolo della frequenza nella formazione della conoscenza linguistica. La cosiddetta *input frequency* infatti gioca un ruolo molto complesso e composito nell'ambito del processo dello sviluppo linguistico. Come indicato da Gaskins et al. (2022), la *frequenza del token*, ossia il numero delle volte in cui la stessa unità/combinazione/costruzione linguistica viene sentita o utilizzata, porta al suo radicamento olistico. In altre parole, la routinizzazione cognitiva esercita un influsso sulla sua automatizzazione e sulla facilità e rapidità di elaborazione successiva. In secondo luogo, la frequenza del tipo di frequenza risulta essere di capitale importanza per l'acquisizione delle costruzioni grammaticali (Gaskins et al., 2022). Infatti, più le ricorrenze di diverse tipologie di parole sono ricorrenti a livello di esposizione e utilizzo nello stesso punto di espressioni simili, prima la costruzione sottostante risulta essere segmentata e apparentemente produttiva (Bybee, 2010), accelerando il ritmo della sua acquisizione e uso (Ninio, 1999; Lieven et al., 1992; Pine et al., 1998). Nel processo inerente alla connessione tra i costrutti nuovi e quelli già instaurati nella memoria, i bambini usano procedimenti di analogia (si servono delle somiglianze che facilitano la categorizzazione) e generalizzazione (Lieven, 2010; Gaskins et al., 2022).

teorica incentrata sull'uso e una comprensione più approfondita della commutazione di codice. Per tali obiettivi, vengono indagate le modalità impiegate dai locutori bilingui per sfruttare le somiglianze linguistiche ai fini della realizzazione di una commutazione economicamente efficiente.

Uno degli aspetti centrali e innovativi del suddetto approccio riguarda l'opposizione e il rigetto dell'idea della modularità, in quanto secondo i suoi postulati non si dovrebbero fare distinzioni aprioristiche tra il sistema grammaticale e quello lessicale, siccome l'unità fondamentale in riferimento all'uso linguistico è rappresentata dall'enunciato concreto che è generato durante l'atto comunicativo, con la combinazione di unità basiche specifiche e schematiche (composte da costrutti semplici o multipli) quali parti integranti dell'assetto cognitivo del locutore (Bybee, 2010). In tal senso la conoscenza linguistica si compone di rappresentazioni che vengono costantemente aggiornate, in riferimento al processo d'utilizzo delle stesse¹² (Gaskins et al., 2022). Uno dei punti focali dell'approccio applicato allo studio della commutazione di codice, è infatti l'indagine dei modelli di suddivisione in blocchi di unità che riflettono i processi cognitivi coinvolti nella produzione linguistica, esplorando come i parlanti raggruppino gli elementi linguistici nel discorso (Martinez & Wu, 2022). Inoltre, si osservano i casi di innovazione costruttiva e adattamento dei modelli grammaticali in specifici co(n)testi d'occorrenza (Kim & Silva, 2023; Patel & Kim, 2021).

CORNICE METODOLOGICA DELLA RICERCA

La commutazione di codice, quale pratica usuale e ricorrente nell'ambito della modalità discorsiva bilingue (Grosjean, 1998) propria del repertorio linguistico colloquiale quotidiano dei bilingui istriani, ovvero della comunità italoфона dell'Istria (conversazioni spontanee in istroveneto, caratterizzate dalla presenza/inserzione di costrutti croati che coinvolgono il livello morfosintattico, lessicale/semantico e pragmatico) rappresenta il punto di partenza della nostra indagine. Infatti, il complesso e composito paesaggio sociolinguistico istriano, in cui si realizzano diverse combinazioni d'uso di varietà linguistiche in contatto reciproco, inserite in una distribuzione sociolinguistica gerarchica e complementare (gerarchica) doppiamente diglossica, prevede la presenza del croato e della variante dialettale ciacava (croatofonia), ossia dell'italiano e del dialetto istroveneto (italofonia). Con l'inserimento di ulteriori varianti linguistiche del repertorio istriano e di idiomi alloctoni, sono realizzabili pure altre forme di poliglossia multipla imperfetta (es. la triglossia, la

tetraglossia, la pentaglossia e vari rapporti multilingui in generale) (Blagoni, 2007; Filipi, 1989a; 1989b; Milani Kruljac, 1990; Blagoni et al., 2016; Scotti Jurić, 2003).

Al fine di cogliere l'incidenza e l'implicazione degli aspetti più pertinenti e rappresentativi del discorso bilingue istriano, è stato sottoposto a scrutinio il C-ORAL-IC (*Corpus of Spoken Istrovenetian/Fiuman and Croatian*) (Poropat Jeletić et al., 2024), il corpus sviluppato nell'ambito del progetto scientifico "Approccio multilivello al discorso parlato nello sviluppo linguistico" (2018–2022) finanziato dalla Fondazione Croata per la Scienza, elicitato nell'ambito di interazioni discorsive quotidiane spontanee non monitorate (Poplack, 2018) degli italoфoni istriani (parlanti bilingui relativamente equilibrati) e costruito mediante l'uso del metodo di campionatura linguistica (*language sampling*) (Čermak, 2009). Il corpus è, infatti, stato raccolto seguendo i principi metodologici consolidati nell'ambito della documentazione del parlato spontaneo (Kuvač Kraljević & Hržica, 2016; Kuvač Kraljević et al., 2016). In particolare, il processo di raccolta dei dati ha seguito criteri di selezione rappresentativi della comunità linguistica, adottando strategie di campionatura simili a quelle impiegate nei corpora di lingua parlata adulta come per il *Croatian Adult Spoken Language Corpus (HrAL)* (Kuvač Kraljević & Hržica, 2016). L'indagine sul campo ha incluso registrazioni in ambienti naturali, senza interferenze del ricercatore, per garantire la massima autenticità delle interazioni linguistiche in contesti informali (ad es. interazioni familiari, scambi tra amici, conversazioni sul posto di lavoro).

Le indagini sono state condotte mediante l'ausilio di CLAN (*Computerized Language Analysis*), che rientra nei programmi *TalkBank* (MacWhinney, 2007), siccome il C-ORAL-IC è stato composto in base alle convenzioni normative di CHAT (*Codes for Human Analysis of Transcripts*) (MacWhinney, 2000), seguendo lo standard per la codificazione e la segmentazione dello stesso, nonché per il sistema di marcatura delle sequenze commutate. Ai fini dello studio, l'analisi è stata condotta su un sottocampione del suddetto corpus, composto da sequenze ordinate di circa 70 costrutti monolessicali o plurilessicali soggetti a commutazione linguistica, che rivestono specifiche funzioni referenziali e pragmatiche.

Tra i locutori che sono stati coinvolti nella creazione del suddetto corpus, che hanno compilato un questionario sociodemografico e sociolinguistico in forma scritta, figurano parlanti bilingui italoфoni residenti nella Regione istriana di tre generazioni (91 in totale), residenti in tutte le aree bilingui della regione (aree

¹² Come spiegano Gaskins et al. (2022), la produzione di un'unità linguistica rappresenta un procedimento mentale di routine, ovvero un modello ricorrente di attivazione cognitiva, quale parte integrante dell'attività di elaborazione linguistica. Le rappresentazioni utilizzate possono essere unità complesse pienamente specifiche o almeno parzialmente schematiche (i *slot-and-frame schema* che dominano l'uso e l'acquisizione linguistica e funzionano come porte d'accesso per la creazione di strutture sintattiche man mano più complesse).

in cui il bilinguismo è statutariamente riconosciuto), provenienti da contesti sociodemografici, socioeconomici e sociolinguistici diversi, in virtù dell'esposizione linguistica, della percezione dell'uso delle varietà linguistiche in svariati domini comunicativi (familiare, scolastico, amicale, professionale, pubblico, e via dicendo), e dell'autovalutazione della propria competenza linguistica nell'ambito di ciascuna delle varietà linguistiche del proprio repertorio linguistico (es. italiano, croato, istroveneto, ciacavo, altre lingue seconde/straniere; contesto di acquisizione e della lingua ed età di inizio acquisizione/apprendimento, contesto d'uso della lingua e reti sociolinguistiche, ecc.). La maggioranza dei partecipanti rientra nella fascia di età compresa tra i 21 e i 40 anni (56%), seguita dalla fascia dai 51 ai 60 anni (17%), dai 61 ai 70 anni (9%), dai 41 ai 50 anni (6%), mentre una percentuale più bassa (1%) appartiene ai gruppi di età dai 11 ai 20 e dai 81 ai 90 anni. Per quanto riguarda il genere, si osserva una netta prevalenza del sesso femminile tra i partecipanti (68%). Dei 91 partecipanti, il 44% (40 persone) è nato a Pola, il 24% (22 persone) a Fiume, il 20% a Capodistria (18 persone) e l'1% (1 persona) nelle restanti località. Per il 5% dei partecipanti, i dati relativi al luogo di nascita non erano disponibili. La maggior parte degli intervistati attualmente risiede nelle città più popolate, ossia nei maggiori centri urbani, come Pola o Fiume. In totale, 87 persone su 91 hanno indicato una varietà italoфона da sola o abbinata a una varietà croatoфона come la propria lingua materna (o L1+L2). Quasi la totalità del campione è categorizzabile nell'ambito del bilinguismo (precoce) relativamente equilibrato, siccome i locutori hanno autovalutato la propria competenza linguistica dell'istroveneto e del croato come molto buona o ottima. Per autovalutare le proprie competenze linguistiche, i partecipanti hanno utilizzato la scala di Likert (1-5) per le macroabilità linguistiche (comprensione, parlato, lettura, scrittura) inerenti all'italiano, al croato, all'istroveneto, al ciacavo e alle altre lingue conosciute.

ANALISI DEI DATI

Questa ricerca si propone di indagare i comportamenti della commutazione di codice dei parlanti bililingui italoфoni in Istria avvalendosi dell'Approccio basato sull'Uso. In particolare, si intende creare un quadro introduttivo per esaminare il ruolo delle esperienze linguistiche e dell'esposizione nel plasmare i modelli di commutazione di codice dei parlanti italoфoni istriani, cercando di scoprire i meccanismi cognitivi alla base della selezione degli elementi linguistici nelle espressioni di commutazione di codice e analizzare i fattori sociali e pragmatici che influenzano il verificarsi del fenomeno indagato nei contesti comunicativi quotidiani. Nel corso dell'analisi sono stati esaminati circa 70 esempi di commutazione di codice (monolesicali

o plurilesicali), raccolti nell'ambito delle interazioni discorsive spontanee della comunità italoфona istriana. Tuttavia, ai fini della trattazione, nel saggio sono stati riportati gli esempi più palesi e rappresentativi, selezionati in base alla loro rilevanza nel dimostrare le dinamiche principali del fenomeno, per un totale di 10 occorrenze, prendendo in considerazione la natura funzionale polivalente della commutazione, quale strumento per favorire la gestione discorsiva e l'interscambio referenziale e interazionale a livello intrafrastico e interfrastico con differenti configurazioni distribuzionali (Dal Negro, 2005; Muysken, 2000). La ricerca impiega pertanto i postulati del suddetto al fine di comprenderne l'interazione dinamica tra fattori cognitivi, sociali ed esperienziali che influenzano i modelli di commutazione di codice. Gli aspetti considerati convergono in una comprensione articolata del comportamento linguistico bilingue nello specifico contesto d'occorrenza.

L'indagine prende avvio dall'esame dell'influenza della frequenza nelle decisioni di commutazione di codice, illustrando come gli elementi ad alta frequenza in entrambe le lingue assumano un ruolo cruciale nell'alternanza linguistica. La considerazione della facilità di accesso e dell'incorporazione di elementi ad alta frequenza evidenzia l'influenza dei modelli di utilizzo nella dinamica dell'alternanza linguistica. Gli esempi esplicativi che verranno forniti si allineano con l'Approccio adottato, evidenziando la versatilità del locutore nell'impiego di entrambe le lingue in accordo con il contesto comunicativo, sottolineando la natura dinamica e dipendente dal contesto interazionale. La transizione dall'istroveneto al croato avviene riflettendo la propensione del parlante a sfruttare le risorse linguistiche più idonee per trasmettere informazioni specifiche, in virtù della rilevanza delle esperienze interazionali e dei modelli di utilizzo nel plasmare le "decisioni" linguistiche. In una delle conversazioni del corpus analizzato, per indicare la "questura" molteplici volte appare l'acronimo croato "MUP" (che in croato sta per "Ministarstvo unutarnjih poslova", ossia "Ministero degli affari interni"), che tipicamente viene utilizzato accanto a "policija". Negli esempi 1 e 2 il locutore, dimostrando una preferenza nell'utilizzo del lessema croato "MUP" per trasmettere un concetto specifico, in linea con i postulati dell'Approccio Basato sull'Uso, enfatizza la selezione dinamica e l'impiego rapido degli elementi linguistici in base alla frequenza e all'accessibilità cognitiva e lessicale, integrando dinamicamente elementi croati per raggiungere l'efficienza, la precisione e la chiarezza comunicativa (Filipi, 1995; Umer Kljun, 2024, 105–108). Infatti, il principio cardine dell'Approccio Basato sull'Uso è legato al ruolo della frequenza nella formazione della conoscenza linguistica. Nel contesto della commutazione di codice gli elementi linguisticamente frequenti in entrambe le lingue diventano facilmente accessibili

e sono maggiormente propensi ad essere incorporati nell'alternanza linguistica. Questa prospettiva, incentrata sulla frequenza, getta luce sull'uso naturale e adattivo degli elementi linguistici nel discorso bilingue. Nell'ambito di reti di co-occorrenza, diversi schemi di elementi linguistici possono avere frequenze di utilizzo diverse. Una frequenza relativa più elevata delle unità linguistiche facilita l'attivazione dei rispettivi schemi (Meuter, 2009), che conseguentemente aumenta la frequenza di utilizzo. Tali unità possono essere organizzate nel lessico in una certa misura in virtù della frequenza d'uso (Moritz-Gasser & Duffau, 2009). Al contempo, le unità linguistiche funzionali presentano un numero più elevato di interconnessioni con unità aventi minore frequenza, come unità singole, idiomi o costruzioni variabili (Wasserscheidt, 2021).

Esempio 1: Vado in **MUP** per el pasaporto.

Traduzione: Vado in questura per il passaporto.

Esempio 2: Ma ti son stada al **MUP** a dir che ti ga perso la **osobna**?

Traduzione: Ma sei stata in questura per dire che hai perso la carta d'identità?

Esempio 3: Me servi el **rodni list** e la **domovnica** e la **osobna**.

Traduzione: Mi serve il certificato di nascita, il certificato di cittadinanza¹³ e la carta d'identità.

Negli esempi 2 e 3 l'inserimento dei termini croati "osobna", "rodni list" e "domovnica" nella frase istroveneta mette in mostra l'accesso lessicale e la scelta del parlante in base alla frequenza e alla familiarità lessicale nell'ambito del contesto d'uso, confermando le impostazioni teoriche dell'Approccio adottato enfatizzando il ruolo della frequenza dell'input linguistico nell'apprendimento e nell'uso della lingua, siccome gli elementi linguistici ad alta frequenza sono più facilmente accessibili nell'ambito del lessico cognitivo e la conoscenza della lingua non risulta essere fissa ma costruita dinamicamente attraverso i modelli di utilizzo. Anche in questi casi, i parlanti attingono ai termini più accessibili e appropriati per trasmettere il concetto del documento in questione, facente parte ovviamente del dominio burocratico-amministrativo permeato dalla croaticità. Infatti, come riportato anche in Poropat Jeletić et al. (2021), considerando il contesto sociolinguistico della comunità italoфона in Croazia, descritto nell'introduzione, risulta evidente il motivo per cui la commutazione di codice si manifesti in ambiti lessicali settoriali o in riferimento a contesti fisici ben definiti. Dal momento che la lingua croata è predominante nelle pratiche

burocratiche e amministrative, i parlanti tendono ad attingere più facilmente al repertorio lessicale croatofono in queste situazioni. Gli esempi analizzati confermano come il lessico specialistico relativo all'amministrazione venga frequentemente recuperato in croato, mentre l'istoveneto continui a essere utilizzato per la struttura discorsiva generale. Un ulteriore elemento degno di nota è il fenomeno per cui, una volta che un parlante introduce un termine attraverso la commutazione, anche gli interlocutori riproducono lo stesso passaggio linguistico per riferirsi allo stesso referente. Non si osservano, infatti, casi in cui due interlocutori designino uno stesso concetto utilizzando codici differenti.

Funzioni pragmatiche

Sull'asse della dimensione interazionale, si sviluppano procedimenti graduali di elaborazione, generalizzazione e schematizzazione di informazioni pragmatiche nell'ambito dell'adeguatezza delle unità linguistiche (Wasserscheidt, 2021). L'analisi delle funzioni sociali e pragmatiche nella commutazione di codice fornisce una comprensione più ampia della pratica linguistica bilingue, mettendo in evidenza come l'alternanza linguistica sia intrinsecamente orientata verso specifici scopi sociali, interattivi o comunicativi. A volte la commutazione di codice può servire come strategia volta ad affermare l'identità sociale e stabilire una connessione di solidarietà con i propri interlocutori (cfr. Umer Kljun, 2024, 187 – sulla commutazione di codice come modalità di segnalazione identitaria e di instaurazione di una connessione con gli altri partecipanti nello scambio comunicativo). Funzioni pragmatiche come la formalità e l'inclusività svolgono un ruolo cruciale nell'alternanza linguistica e la consapevolezza delle motivazioni sociali, come l'espressione di identità e la creazione di solidarietà e, al contempo, contribuisce a un quadro più completo delle scelte linguistiche nei contesti di interazione sociale. L'integrazione di questi aspetti sociali con i meccanismi cognitivi rafforza ulteriormente la concezione dinamica e contestualizzata dell'uso del discorso bilingue. Un esempio dell'impiego di costrutti con funzione pragmatica nell'ambito della commutazione interfrasale come l'inclusione della sequenza formulaica plurilessicale commutata "iz vedra neba" (con significato: come un fulmine – sottinteso - a ciel sereno; letteralmente: dal/a ciel sereno) sia utilizzata per uno scopo pragmatico specifico, ossia per trasmettere un senso di informalità in riferimento a notizie o accadimenti del tutto improvvisi o inaspettati. L'esempio mostra come l'approccio utilizzato

¹³ "Domovnica" si traduce spesso come "certificato di cittadinanza", ossia con un equivalente concettuale approssimativo in termini descrittivi di un documento tipico della realtà croata, che in Italia non viene erogato e quindi un costrutto equivalente italiano non esiste.

contribuisca a comprendere la commutazione di codice esaminando gli effetti di frequenza e flessibilità cognitiva, enfatizzando l'interazione tra fattori sociali e uso del linguaggio, fornendo informazioni sulle motivazioni pragmatiche sottostanti alla commutazione di codice, consentendo pertanto di indagare la natura dinamica e dipendente dal contesto dei comportamenti connessi alla fenomenologia del contatto linguistico nelle comunità bilingui. Pertanto, il relatore attinge alle risorse linguistiche più adatte e immediate, riflettendo l'attenzione dell'approccio basato sull'uso sull'adattamento dell'uso della lingua, incorporando la denominazione in croato per cogliere le sfumature pragmatiche implicate in virtù della rapidità ed efficacia espressiva.

Esempio 4: Ma no(n) ti pol come iz vedra neba.
Traduzione: *Ma non puoi come (il fulmine) a ciel sereno.*

Numerosi esempi del corpus rivelano il ricorso al procedimento cognitivo del *chunking* nell'ambito della commutazione di codice, dimostrando come i parlanti tendano naturalmente a raggruppare "in blocchi semantici" gli elementi discorsivi. Il "chunking" si riferisce alla tendenza di organizzare e produrre le sequenze comunicative in unità lessicali significative che celano dei messaggi semantici più estesi, piuttosto che in singole parole. Ciò viene esemplificato attraverso l'inclusione del costrutto croato "aj bok" all'interno di una frase istroveneta nell'esempio 5, riflettendo per l'appunto la propensione cognitiva del locutore a elaborare la sequenza frastica in blocchi di significato, incorporandolo in una frase coesa per esprimere le proprie condizioni salutari del momento.

Esempio 5: No me sento ben. Me sento proprio **aj bok**.
Traduzione: *Non mi sento bene. Mi sento proprio malissimo (letteralmente: arrivederci).*

L'uso del costrutto croato "aj bok" all'interno della frase italiana esemplifica la suddivisione lessicale in blocchi. Invece di usare la parola "mal/malissimo" (male/malissimo) in istroveneto, il parlante opta per il costrutto croato il cui significato nel parlato colloquiale tra i croatofoni coincide con una gamma di termini più ampia, tutti enfaticamente una condizione salutare pessima. L'inserzione del costrutto nella sequenza istroveneta ha fatto sì che si formasse una struttura frastica coerente offrendo un'interpretazione idiolettica, creativa ed espressiva dell'interlocutore in questione. Ciò riflette la tendenza cognitiva a elaborare e produrre il linguaggio in blocchi significativi, sottolineando l'attenzione dell'Approccio Basato sull'Uso sulle unità linguistiche olistiche. Negli esempi che seguono (esempi 6 e 7) si illustra la selezione di elementi linguistici da parte di chi parla per trasmettere un significato

sfumato con l'ausilio di due rafforzativi tipicamente usati nella lingua croata, ossia l'avverbio "skroz" e il prestito dall'inglese "ful", ambedue denotanti la volontà di esprimere una sfumatura di intensificazione del significato (la stessa struttura si riscontra nella commutazione di codice tra istroveneto e sloveno – cfr. Pulvirenti, 2016; Umer Kljun, 2024). L'inserimento dell'intensificatore aggiunge una sfumatura espressiva alla frase istroveneta, incorporando dinamicamente elementi di ambedue le lingue per una comunicazione espressivamente ricca e adattiva.

Esempio 6: Lui se ga comportà **skroz** ok.
Traduzione: *Lui si comportato bene (del tutto).*

Esempio 7: Iera **ful** strano vederlo là.
Traduzione: *Era veramente strano vederlo lì.*

Estendendo l'osservazione alla riduzione lessicale, gli esempi 2, 8 e 9 svelano come i locutori bilingui semplifichino gli elementi linguistici per garantire una comunicazione più rapida ed efficace. Gli episodi in cui si fa uso dei termini "osobna", "mineralna" e "kartica" all'interno di una frase istroveneta incarnano l'applicazione pragmatica della riduzione lessicale, mettendo in luce il riconoscimento da parte dell'Approccio Basato sull'Uso della lingua come sistema dinamico e adattivo. La riduzione lessicale implica infatti la semplificazione degli elementi o delle sequenze linguistiche, spesso attraverso l'uso di forme ridotte del vocabolario di base per facilitare la comunicazione e rendere più rapido il flusso trasmissivo in virtù dell'economia linguistica. In tal senso le strutture plurilessicali "osobna iskaznica/carta d'identità", "acqua minerale/mineralna voda", "telefonska kartica/scheda telefonica" vengono sostituite dalle formulazioni monolessicali e i locutori optano per un costrutto croato lessicalmente "ridotto" e semplificato.

Esempio 8: Bevemo una **mineralna** a metà.
Traduzione: *Beviamo un'acqua minerale a metà.*

Esempio 9: Dove ti ga comprà questa **kartica**?
Traduzione: *Dove hai comprato questa scheda.*

Concettualizzazione

Uno dei cardini della riflessione dell'approccio applicato riguarda il modo in cui i parlanti plasmano le proprie scelte linguistiche in base alla concettualizzazione di idee ed esperienze. L'integrazione della sessione di "brainstorming" in una frase in istroveneto esemplifica il modo in cui la concettualizzazione incide sulla commutazione di codice, in linea con la natura dinamica della costruzione della sequenza linguistica, riflettendo nell'esempio 10 il ricorso a un costrutto normalmente usato in contesti formali, che si trova

nel deposito della memoria come sequenza fissa, connessa a delle esperienze implicite. Il locutore, infatti, prende le distanze da un comportamento non accettato socialmente e punibile, contrastando le opinioni personali dell'agente dell'azione (cfr. Gumperz, 1982 – sulla personificazione/oggettivazione del messaggio) con dei fatti generalmente riconosciuti, implicando la connessione alle forze dell'ordine e alle conseguenze che potrebbero emergere dalla violazione delle regole. Il parlante mostra flessibilità cognitiva integrando fluidamente le strutture sintattiche di entrambe le lingue per costruire narrazioni coese. La commutazione di codice non è limitata esclusivamente alle strutture grammaticali, ma implica flessibilità cognitiva nel combinare elementi sintattici di entrambe le lingue durante la pianificazione della frase. Ciò è in linea con i postulati della prospettiva di riferimento, secondo cui l'uso del linguaggio è adattivo e influenzato dai processi cognitivi.

Esempio 10: Quei che ga più tempo cusi i fa la cena a casa e dopo per no(n) menar **pod utjecajem alkohola** i va dormir e bona note.

Traduzione: Quelli che hanno più tempo preparano la cena e dopo per non guidare sotto l'influenza dell'alcool vanno a dormire e buona notte.

DISCUSSIONE E CONCLUSIONE

L'analisi condotta ci induce a concludere che i fenomeni di contatto interlinguistico e la commutazione di codice costituiscano una parte integrante e autentica della prassi discorsiva quotidiana della comunità bilingue istriana, una modalità discorsiva naturale e spontanea dei locutori bilingui di elevata competenza linguistica/comunicativa in entrambe le lingue, come ampiamente esposto nella bibliografia sull'argomento (cfr. Blagoni, 2007; Milani Kruljac, 1990; Scotti Jurić, 2003), che rivela pure innumerevoli similitudini con il contesto dell'Istria slovena (Baloh, 2022; Todorović & Baloh, 2022; Buić, 2014a; 2014b; 2020; Todorović, 2021; Umer Kljun, 2015; 2023; 2024). Le esemplificazioni analizzate rappresentano solo una minima parte delle occorrenze commutate del corpus preso in esame (si ricorre all'inventario dei costrutti croati, considerata la dominanza sociale e pragmatica del croato) ed esse confermano come i parlanti siano in grado di gestire con grande disinvoltura le alternanze di codice senza apportare interruzioni al naturale flusso conversazionale, considerata l'alta competenza comunicativa nell'ambito dei codici linguistici impiegati. L'Approccio Basato sull'Uso si fonda sull'idea che la conoscenza linguistica si costruisca attraverso l'utilizzo effettivo della lingua. L'analisi della commutazione di codice in questo contesto consente di catturare gli aspetti naturali e

dinamici del comportamento linguistico dei parlanti bilingui istriani in contesti comunicativi autentici e spontanei, allineandosi con la premessa che il linguaggio sia adattivo, modellato dalla frequenza, nonché influenzato da fattori cognitivi e sociali. La commutazione di codice in tal senso riflette la flessibilità cognitiva dei locutori bilingui e la loro capacità di transizione fluida (senza esitazioni e senza sforzi) tra un codice e l'altro testimonia la natura dinamica del processo di elaborazione e produzione linguistica. La comprensione di come i parlanti navighino in prospettiva interlinguistica e utilizzino le risorse linguistiche di ambedue gli inventari linguistici fornisce preziose informazioni sui meccanismi cognitivi coinvolti nell'uso delle varietà linguistiche in questione. Infatti, essi adottano la commutazione come strategia discorsiva efficace, per trasmettere determinate sfumature legate all'identità sociale, all'instaurazione della solidarietà, al modellamento dei confini del discorso, e via dicendo. Gli schemi insertivi rivestenti determinate funzioni discorsive e socio-pragmatiche con configurazioni distribuzionali diversificate, ricoprendo funzioni referenziali e interazionali, sono stati analizzati applicando l'Approccio Basato sull'Uso, focalizzando l'attenzione sulla concettualizzazione nell'uso e nelle esperienze linguistiche che forgiavano le scelte linguistiche, sugli effetti di frequenza, ricorrenza, accessibilità e incidenza dei modelli di utilizzo sulle scelte, nonché sugli scopi e sulle funzioni pragmatiche della commutazione di codice, quale risorsa e strategia espressiva adoperata per modellare la gestione discorsiva (Dal Negro, 2005). L'indagine condotta è stata rivolta all'osservazione dei modelli di suddivisione in blocchi di unità che riflettono i processi cognitivi coinvolti nella produzione linguistica e alle modalità impiegate per sfruttare i modelli di somiglianza linguistica. I risultati sottolineano la dinamicità intrinseca all'uso del linguaggio, in cui convergono fattori cognitivi, sociali ed esperienziali per plasmare i modelli di comunicazione bilingue, partendo dal presupposto che l'interlocutore sia in grado di capire il messaggio enunciato in qualsiasi delle combinazioni linguistiche, per il codificatore del messaggio risulta più vantaggioso utilizzare la strategia della commutazione di codice per utilizzare la varietà linguistica che preferisce nello specifico momento di enunciazione, invece di svolgere complesse e/o faticose attività mentali di ricerca strutturale o lessicale per uniformare linguisticamente il messaggio. Gli esempi illustrano come l'approccio applicato offra un quadro teorico versatile per analizzare i costrutti commutati, in virtù della versatilità e adattività del fenomeno della commutazione. I locutori bilingui, infatti, attingono alle unità linguistiche ritenute più adatte e

pertinenti in base all'accessibilità, alla frequenza e all'adeguatezza contestuale, offrendo approfondimenti sull'indagine della commutazione in virtù della sua natura dinamica e della sua dipendenza dal contesto comunicativo. In tal senso risulta indicativa la definizione di Hakimov e Backus (2021), che enfatizza il fatto che l'Approccio Basato sull'Uso riveli nuovi aspetti di fenomeni consolidati.

I risultati ottenuti evidenziano una salda correlazione tra le esperienze linguistiche dei locutori bilingui, quali l'esposizione e la competenza linguistica, e i modelli di utilizzo della commutazione di codice che contrassegnano il comportamento discorsivo bilingue, consentendo di esplorare i processi cognitivi sottostanti. L'indagine, infatti, dimostra che la commutazione di codice non sia per niente una ricorrenza casuale, bensì governata da processi cognitivi, quali l'accesso lessicale, l'integrazione sintattica e la coerenza discorsiva. I risultati infatti avvalorano l'ipotesi che i locutori bilingui sfruttino le risorse cognitive in riferimento ad ambedue le varietà linguistiche per ottimizzare la comunicazione, sottolineando il ruolo dei meccanismi cognitivi nell'uso della commutazione. Gli esempi analizzati enfatizzano il ruolo dell'interazione dinamica tra

i principi che si riferiscono alla frequenza, alla riduzione lessicale, alla suddivisione in blocchi di unità, alla concettualizzazione, alle innovazioni e alle somiglianze, che enfatizzano l'adattamento dinamico dei modelli grammaticali e lessicali, evidenziando come i locutori bilingui contribuiscano attivamente alla costruzione/evoluzione dei modelli d'uso linguistico, mettendo in rilievo il suo costante mutamento, modellato dall'esperienza linguistica degli interlocutori e dalle interazioni sociali. L'interazione dei fattori sociali e di quelli cognitivi, infatti, fornisce una comprensione sfumata della commutazione, intesa come strategia comunicativa dinamica. Svelando l'articolata interazione tra esperienze linguistiche e i modelli di utilizzo, i meccanismi cognitivi e i fattori sociali nell'osservazione del fenomeno della commutazione di codice, e contribuendo a una comprensione più approfondita delle pratiche discorsive bilingui, è opportuno considerare la validità dell'approccio apportato, le cui implicazioni spaziano dalle teorie linguistiche e cognitive, all'acquisizione del linguaggio, all'educazione bilingue e alla sociolinguistica, promuovendo un approccio olistico all'esplorazione del bilinguismo.

UPORABA PRISTOPA TEMELJEČEGA NA RABI (USAGE-BASED APPROACH): RAZISKAVA O KODNEM PREKLAPANJU PRI ISTRSKIH ITALOFONIH GOVORCIH

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POVZETEK

Študija uporablja paradigmo pristopa temelječega na rabi (Usage-Based Approach), kot teoretični in metodološki okvir za preučevanje funkcionalnosti kodnega preklapljanja v kontekstu istrske italofonije, kjer se ta pojav kaže kot ponavljajoča se in spontana diskurzivna praksa. Ob upoštevanju dinamične in prilagodljive narave kodnega preklapljanja raziskava stremi k osvetlitvi kognitivnih in diskurzivnih mehanizmov, ki vplivajo na procesiranje in produkcijo preklopljenih jezikovnih sekvenc. Poseben poudarek je namenjen konceptualizaciji, frekvenci, dostopnosti, podobnosti in prilagoditvi jezikovnih konstruktov v specifičnih kontekstih ter njihovim pragmatičnim funkcijam in ciljem. Ugotovitve raziskave potrjujejo da kodno preklapanje v obravnavani skupnosti ni rezultat naključne rabe, temveč odseva visoko stopnjo jezikovne in komunikacijske usposobljenosti govorcev, ki med jeziki prehajajo tekoče in brez prekinitve naravnega diskurzivnega toka. Podrobna analiza primerov razkriva da govorci zavestno mobilizirajo jezikovne vire glede na njihovo frekventnost, dostopnost in ustreznost v določenem komunikacijskem kontekstu, pri čemer oblikujejo dinamične modele jezikovne rabe. Kodno preklapanje se izkazuje kot prefinjena diskurzivna strategija, namenjena izražanju identitetnih, referencialnih in interakcijskih pomenov, s čimer se dodatno potrjuje ustreznost pristopa, temelječega na rabi, kot učinkovitega orodja za preučevanje naravne dvojezične komunikacije v realnih družbenih okoliščinah.

Ključne besede: dvojezični govor, korpus govorenega jezika, jezikovno vzorčenje, preklapljanje kod, TalkBank, Usage-Based Approach

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TO THE METHODOLOGY OF DETERMINATION GENEALINGUISTIC LANGUAGE BORDERS: THE DELIMITATION OF LOCAL DIALECTS IN GORSKI KOTAR – A CASE STUDY

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ABSTRACT

The paper critically examines and evaluates two different methodological approaches to the determination of genealinguistic language, more specifically dialectal borders, using the case of the study of local dialects in the Gorski kotar region. Dialectology is defined as a science within genealogy, which is one of the three branches of linguistics (along with typolinguistics and sociolinguistics). It is emphasised that within dialectology, theorems and criteria from different branches of linguistics cannot be combined, and in this context a clearer definition of the meaning of the adjective Slovenian within the phrase Slovenian dialects is also given. The paper also provides a genealogical justification for the revised Map of Slovenian dialects (version 2023).

Keywords: Slovenian dialects, genealogy, dialectology, comparative Slavic linguistics, linguistic border, Slovenian Linguistic Atlas

CONTRIBUTO ALLA METODOLOGIA DI DETERMINAZIONE DEI CONFINI LINGUISTICI DAL PUNTO DI VISTA DELLA LINGUISTICA GENEALOGICA: CASO STUDIO SULLA DELIMITAZIONE DELLE PARLATE LOCALI NEL GORSKI KOTAR

SINTESI

L'articolo esamina e valuta criticamente due diversi approcci metodologici utilizzati nella determinazione della lingua in chiave genealogica, più precisamente dei confini dialettali, utilizzando il caso studio sulle parlate locali nella regione del Gorski kotar. La dialettologia viene definita come una scienza all'interno della linguistica genealogica, che è una delle tre branche principali della linguistica (insieme alla linguistica tipologica e alla sociolinguistica). Si sottolinea che all'interno della dialettologia, non è possibile combinare i teoremi e i criteri propri dei diversi rami della linguistica. In questo contesto viene anche fornita una definizione più precisa del significato dell'aggettivo "sloveno" all'interno dell'espressione "dialetti sloveni". Il documento offre anche una giustificazione genealogica per la revisione della Mappa dei dialetti sloveni (versione 2023).

Parole chiave: Dialetti sloveni, genealogia, dialettologia, linguistica slava comparata, confine linguistico, Atlante linguistico sloveno

INTRODUCTION¹

This paper examines and critically evaluates two different methodological approaches used to locate a particular local dialect within a particular dialect, using the example of the study of Slovenian and Croatian² local dialects in the Gorski Kotar region. The first methodological approach is based on an already established methodology within dialectology, while the second combines the dialectological method with a methodology from another branch of linguistics, i.e. sociolinguistics.

In recent years, several clearly defined field studies have been carried out in the area of the Kostel and Čebranka dialects of the Lower Carniolan and Rovte dialect groups of the Slovenian language in the Gorski Kotar region of Croatia, which have traditionally up to now been classified in the West gorian subdialect of the Kajkavian dialect group of the Croatian language.

The treatment and research of (possible) Slovenian local dialects in the area of the Republic of Croatia is a sensitive topic, especially due to the tradition of national dialectologies related to dialect classification. The tradition of national dialectologies links the dialectal borders of two related South Slavic languages to the use of the official language of each country, and so the dialectal borders have so far been drawn along national borders. Thus, until recently, all local dialects within Croatia were classified as dialects of the Croatian language, even if linguistic facts contradicted this. In the entire area along the Croatian and Slovenian border, the dialectal border between them is drawn *per se* at the state border or at the rivers (Sotla, Kolpa, Dragonja), but from recent research in the Gorski Kotar area and the dialects along the Sotla (cf. Gostenčnik et al., 2022), we know that this is not the case on the ground, or that the rivers are at most a connecting element between the dialects, not a separating one.

It is precisely because of the two methodologically different approaches that there is also a need to clearly define the meaning of the adjecti-

ve *Slovenian* within the phrase *Slovenian dialects* and, consequently, within the phrase *Slovenian language*, all in the context of dialectology as a linguistic scientific discipline, which must be free from national or sociolinguistic definitions.

This knowledge was already generally accepted within linguistics or dialectology decades ago (cf. Ramovš, 1935, 4; Brozović, 1996; Šekli, 2013, 3–4) and by that time it had become embedded in the collective consciousness of (some) linguists (dialectologists) to the extent that it no longer needed to be substantiated. In the last decade, however, especially due to the study of dialects in the area of the state border with Croatia, this approach has once again shown itself to be in need of justification or reiteration of what was taken for granted some time ago.

THEORETICAL FRAMEWORK

Linguistic as a scientific discipline

Linguistics as a scientific discipline is not a unified science, but is divided into three distinct disciplines according to the different aspects of the study of the language system.

Linguistics is divided into typolinguistics, sociolinguistics and genealogical linguistics. Typolinguistics is the descriptive study of the structure, grammar, phonetics and basic vocabulary of each idiom, comparing it, where appropriate, synchronically with other idioms. Sociolinguistics, or social linguistics, studies how speakers deal with an idiom, what it does for them, how they perceive and evaluate it in a social context, and how social circumstances affect the language system.

The main classificatory criterion is the communicative role that a given idiom has in society, whereby the literary or standard language typically presents the most prominent and prestigious linguistic variety. Note, however, that the sociolinguistic term literary/standard language, which refers to a sociolect,

1 This article was written in the framework of the project Research of endangered dialects in the Slovene language area (Radgonski kot, Gradišćanska, Hum na Sutli with surroundings, Dubravica with surroundings (V6-2109, 1 October 2021–31 August 2024, <https://isjfr.zrc-sazu.si/en/programi-in-projekti/research-of-endangered-dialects-in-the-slovene-language-area-radgonski-kot>), co-financed by the Slovenian Agency for Scientific Research and Innovation and the Office of the Government of the Republic of Slovenia for Slovenians Abroad and Internationally, the project i-SLA - Interactive Atlas of Slovenian Dialects (L6-2628, 1 September 2020–31 August 2024, ARIS in SAZU, <https://isjfr.zrc-sazu.si/en/node/101503>) and the programme Slovenski jezik v sinhronem in diahronem razvoju (P6-0038).

2 The adjective “Croatian” is used in this article for the sake of simplicity or ease of understanding. In the context of genealinguistics, the appropriate genealogical term is Central South Slavic, which includes, among others, the Kajkavian dialect group discussed in this article. The term “Croatian language” as a super-denomination exists only within the sociolinguistic division of standard languages. The same applies to the term “Slovenian language”, which in relation to Central South Slavic could be called North-Western South Slavic, a genealogical term. The mentioned geolects (namely Central and North-Western South Slavic) have given rise to different literary languages with national labels (for instance Slovenian language, Croatian language etc.). This article does not deal with the literary languages mentioned.

should not be confused with the genealogical linguistic term language, which designates a geolect. (Šekli, 2023, 16)

“Genealogical linguistic studies the genetic relationship between lects and establishes their genealogical classification based on (the degree of) genetic affinity” (Šekli, 2023, 9). It is based on the wave and stem theory, which “although they often compete in science, they should be seen as complementary: not mutually exclusive, but complementary” (Ivić, 1960–1961, 99; translated by Gostenčnik).³

The knowledge and arguments (and therefore the concepts) of one do not necessarily apply to the other or to the third.

Genetic linguistics studies the relationship between idioms, that is, between languages and dialects, while typological linguistics studies internal structural relationships in a given idiom. Facts from one of these linguistic disciplines have no value as arguments in the other, and even less so in sociolinguistics, which studies the nature of individual idioms in relation to the collectives that support them. Of course, the facts from sociolinguistics are not valid in the other two linguistics either. (Brozović, 1996, 87; translated by Gostenčnik)⁴

As far as their theoretical modelling and methodological approaches are concerned, the three main branches of linguistics are thoroughly independent from each other. Consequently, any kind of research results should not be automatically transferred from one to the other, which amounts to the fact that there are three autonomous types of linguistic classification of any given idiom that will typically need to be established. (Šekli, 2023, 8)

Dialectology as part of genealogical linguistic

Part of genealogical linguistic is dialectology, which deals with organic idioms, from their present (phonetical) state to their original (phonetical) state, i. e. their common (phonetical) denominator.⁵ Its main methods are the comparative method and the

method of reconstruction. Its secondary task is to place a particular micro-organic idiom (i.e. the local dialect of a place) within a group of local dialects which may form a dialect at the next stage. In order to achieve this, it is necessary first to be familiar first with the synchronic state of the individual organic idiom, with the synchronic state of the neighbouring idiom, and so on, followed by the establishment of parallels, i.e. isoglosses. At this stage, these are isophones, i.e. isoglosses of phonetic phenomena, which are then grouped together into individual so-called isoglossic bundles. “Dialect classification is based on linguistic criteria, taking into consideration only the linguistic features of the individual geolects, Historical phonetics/phonology is undeniably the most important criterion for accurate genealogical linguistic classification” (Šekli, 2023, 43). The next level up from a dialect is a dialect group, and the whole of them constitutes a single linguistic system; in the context of the dialectology of Slovenian dialects, this is the *Slovenian linguistic system* or the *Slovenian language*. This is the highest abstraction of dialectology, and this is where its task ends.

The (initial) Common Slovenian phonological system

There is a consensus within Slavic and thus Slovenian genealogical linguistic that each individual Slavic language system is defined according to its starting point. This means that a certain lexeme that is part of the inherited Slavic vocabulary can be phonetically derived to the so-called common linguistic or phonetic denominator within a certain language system. In the dialectology of the Slovenian language, the common linguistic denominator is represented by the so-called (initial) Common Slovenian phonological system (CSln.), which dates back to the late 11th or early 12th century (Logar, 1981, 29–33). This is the last stage of the common development of the Slovenian language just before its first dialectal breakdown, and the system is derived from the last common development stage of the Proto-Slavic language from the beginning of the 6th century.

The (initial) Common Slovenian phonological system contains an inventory of phonological units (i.e. an inventory of all phonemes and their representation in the system), prosody (including the place of

3 “[I]ako one u nauci često nastupaju konkurentno, ipak (ih) treba shvatiti komplementarno: one se ne isključuju već se dopunjuju” (Ivić, 1960–1961, 99).

4 *Genetska lingvistika proučava srodničke odnose među idiomima, to jest među jezicima i među dijalektima, a tipološka lingvistika proučava unutarnje strukturne odnose u pojedinome idiomu te uspoređuje takve odnose. Činjenice iz jedne od tih lingvistika nemaju vrijednosti argumenata u drugoj, a još manje u sociolingvistici, koja proučava prirodu pojedinih idioma u vezi s njihovim nositeljskim kolektivima. Naravno, ni činjenice iz sociolingvistike ne vrijede u drugim dvjema lingvistikama.* (Brozović, 1996, 87)

5 Although it “is important to understand that dialectology is a part of geneolinguistics and of geneolinguistics alone” (Brozović, 1996, 88; translated by Gostenčnik), dialectology and its findings can also act as an auxiliary science to, for example, ethnology or ethnography (e.g. the (non-)existence of a particular object and its term) or sociolinguistics (e.g. data on the change of dialectal and liturgical code in a particular local dialect due to extra-linguistic circumstances).

stress, the length or number of stressed and unstressed vowels, and the intonation or tonemicity), distribution of phonological units (classification restrictions, positional variations of phonemes, classification of accents and tonemes are described here) and origin of phonological units (in addition to symbols (signs, transcriptions) for phonemes and accents, the origin of phonemes from Proto-Slavic voices is given here).

Diachronic division of Slovenian dialects

The basis for the chronological reconstruction of a local dialect is provided by the reconstruction of the basic Slovenian vocalic systems (Rigler, 2001, 1357), with the help of which the local dialect can be genetically identified and assigned to a specific vocalic system or dialect macro-area according to the so-called older linguistic phenomena. The linguistic development of a particular language (vocalic) system is thus traced back to around the 14th century.

Slovenian dialect in the context of genealogical linguistic

The foundations for the definition and understanding of the adjective *Slovenian* within the phrase *Slovenian dialects* in the context of dialectology were laid by Fran Ramovš:

If we speak of language, we have before our eyes a group of dialects bound together by one of these dialects as a cultural dialect; in the same relation, history has also formed the same tribes as a society into a "nation", so that both are formed by history, political-social and cultural. Until and unless there is a cultural linguistic union, we speak only of dialects, and the name of a language is only culturally and historically substantiated and justified, while genetically the name of any dialect of that group should serve for the same designation. (Ramovš, 1935, 4; translated by Gostenčnik)⁶

The same premise was later followed by Dalibor Brozović:

Dialects are then ranked as a language, a language in the genetic-linguistic sense. In science, according to an American linguist, we call it a diasystem language. The term diasystem means a system of common features for a certain number of idioms. Well then, the local dialects make up the diasystem of the local dialect group. Local dialect groups form a diasystem of dialects. Dialects form a diasystem, which we then call a group of dialects. Groups of dialects are thus classified as a language diasystem. (Brozović, 2004, 3; translated by Gostenčnik)⁷

Recently also Matej Šekli: "In the framework of genealogical linguistic classification, the term *language* is to be defined as a geolect, which encompasses groups of dialects and their local varieties displaying the same set of linguistic features (i.e., archaisms and/or innovations)" (Šekli, 2023, 11). As for the adjective *Slovenian*:

In the present paper, the adjective Slovenian is used in the genetic-linguistic sense of "which is part of the Slovenian diasystem or Slovenian language, i.e., which exhibits Slovenian (and possibly non-Slovenian) linguistic innovations", but perhaps not in the politico-legal sense of "which is located on the territory of the Republic of Slovenia" or in the sociological sense of "which feels part of the Slovenian nation or Slovenian nationhood, a Slovenian". Similarly, the adjective "Kajkavian" is understood in the genetic-linguistic sense of "being part of the Kajkavian diasystem, i.e. exhibiting Kajkavian (and possibly non-Kajkavian) linguistic innovations", and not perhaps in the politico-legal sense of "being located on the territory of the Republic of Croatia" or in the sociological sense of "feeling part of the Croatian nation, a Croat". The author therefore does not directly link genetic linguistic categories such as "Slovenian diasystem, Slovenian language" with sociological categories such as "Slovenian nation, Slovenian nationhood", "being Slovenian", as he considers that

6 Če govorimo o jeziku, imamo torej pred očmi skupino dialektov, ki jo veže v enoto eden teh dialektov kot kulturni dialekt; v enakšni relaciji je zgodovina formirala tudi istorodna plemena kot družbo v »narod«, tako da sta oba formirana po zgodovini, politično-socialni in kulturni. Dokler in če ni kulturne jezikovne zveze, govorimo le o dialektih in ime kakega jezika je le kulturno-historično utemeljeno in upravičeno, genetično pa bi smelo služiti za isto označevanje ime katerega koli dialekta te skupine. (Ramovš, 1935, 4)

7 Dijalekti se svrstavajo u narječja. Ostali svijet kaže »u skupine dijalekata«. Slaveni imaju riječ narječje, koja nije iskorištena, pa se onda umjesto skupina dijalekata upotrebljava jedna riječ. Ali treba znati da su narječje i skupina dijalekata sinonimi. Narječja se onda svrstavaju u jezik, i to u genetskolingvističkom smislu shvaćen jezik. U znanosti to nazivamo, prema jednome američkom lingvistu, jezik dijasistem. Termin dijasistem znači sustav zajedničkih osobina za određeni broj idioma. Pa onda mjesni govori čine dijasistem skupine govora. Skupine govora čine dijasistem dijalekata. Dijalekti sačinjavaju dijasistem koji onda zovemo narječjem ili skupinom dijalekata. Tako se onda skupine dijalekata svrstavaju u jezik dijasistem. (Brozović, 2004, 3)

such issues do not fall within the scope of genetic linguistics. (Šekli, 2013, 3–4; translated by Gostenčnik)⁸

Thus, all of them, on the basis of genealogical linguistics, interpret the same thing, namely that the collection of dialects constitutes a larger unit, i.e. a *language*, but in a genealogical sense. Consequently, within a specific branch of linguistics, i.e. dialectology, the phrase *Slovenian language* should also be understood, i.e. only as a collection of *Slovenian dialects*. We are dealing with a term that denotes several different concepts, depending on which branch it is used in. Thus, the adjective *Slovenian* cannot have a unique meaning, but can only have a specific meaning within a particular sub-branch. The same can be said of the phrase *Slovenian dialects*, which is terminologised within dialectology.

However, it is also true that some definitions within Slovenian linguistics create unwanted confusion. Toporišič, in his explanation of the cue *dialectal parsing* (Sln. *narečno razčlenjevanje*) wrote that “the division of the supposedly unified (vernacular) language of all Slovenians into smaller units is due to the recurrent linguistic developmental units, which are not the same in the whole area of the Slovenian language” (Toporišič, 1992, 124; translated by Gostenčnik).⁹ The definition given with the added syntax of “all Slovenians” is unnecessary from a dialectological point of view and may provoke unnecessary reactions. However, the above should be placed in the context of the time and should serve as a starting point for possible corrections.

THE ISSUE

In the Slovenian Linguistic Atlas (SLA), the first volume of which was published in 2011, seven border towns were added to the original network of localities where dialect material is collected (the so-called control points), namely in Croatia (Medžimurje, Posotelje, the Kolpe Valley, Gorski Kotar and Istria),¹⁰ as it was assumed on the basis of previous research¹¹ that these local dialects show certain dialectal developments characteristic of Slovenian dialects (SLA 1.2, 2011, 22). However, on the basis of the systematically collected dialectal material and a detailed analysis, it was already possible to confirm, at the time of the publication of the second volume of SLA in 2016, that genealogically speaking these are in fact local dialects of a Slovenian language system, which were thus included in the SLA network as regular points (SLA 2.2, 2016, 20).

Until recently, on published dialect maps, the entire dialectal border between Slovenian and Croatian dialects ran along the state border. This situation is shown both in Logar-Rigler's Map of Slovenian dialects¹² from 1983 (Logar & Rigler, 1983) and in the Map of the Kajkavskog dialect (Lončarić, 1996). After a series of dialectological research,¹³ various publications (cf. Šekli, 2013; 2018; Gostenčnik, 2018; 2020; 2023) and based on the analysis of the dialectal material for the individual newly added SLA localities in Croatia, the revised Map of Slovenian Dialects (version 2023) was published with the publication of the third volume of the SLA (SLA 3. 1, 2023, 11), where a change was made in the Gorski

8 V pričujočem prispevku je pridevnik slovenski uporabljan v genetolingvističnem pomenu »ki je del slovenskega diasistema oz. slovenskega jezika, tj. ki izkazuje splošnoslovenske (in morebitne nesplošnoslovenske) jezikovne inovacije«, ne pa morda v političnoupornem pomenu »ki se nahaja na ozemlju Republike Slovenije« ali sociološkem smislu »ki se čuti del slovenskega naroda oz. slovenske nacije, Slovenec/Slovenka«. Prav tako je pridevnik kajkavski razumljen v genetolingvističnem pomenu »ki je del kajkavskega diasistema, tj. ki izkazuje splošnokajkavske (in morebitne nesplošnokajkavske) jezikovne inovacije«, ne pa morda v političnoupornem pomenu »ki se nahaja na ozemlju Republike Hrvaške« ali sociološkem smislu »ki se čuti del hrvaškega naroda oz. hrvaške nacije, Hrvat/Hrvačka«. Avtor torej genetolingvistične kategorije kot na primer »slovenski diasistem, slovenski jezik« ne povezuje neposredno s sociološkimi kategorijami, kot so na primer »slovenski narod, slovenska nacija«, »biti Slovenec/Slovenka«, saj tovrstna problematika po njegovem mnenju ne sodi na področje genetolingvistike. (Šekli, 2013, 3–4)

9 “[D]elitev domnevno enotnega (ljudskega) jezika vseh Slovencev na manjše enote zaradi ponavljajočih se jezikovnih razvojnih enot, ki niso enake na celotnem področju slovenskega jezika” (Toporišič, 1992, 124).

10 These are Banfi (SLA T407), Hum na Sutli (SLA T408), Dubravica (SLA T409), Čabar/Čeber (SLA T410), Ravnice (SLA T411), Ravna Gora (SLA T412) and Brest (SLA T413).

11 For a summary of older treatments in the Gorski Kotar area, cf. Gostenčnik (2018, 25, 29–31), and for the Central Styrian and Kozjansko-Bizelsko area, Gostenčnik et al. (2022, 80–81).

12 Tine Logar wrote in his manuscript field notes from the Gorski Kotar area that “the same language is also widespread in the hills beyond the Kolpa in Croatia” (page 1 of the typescript). For more on this, cf. Gostenčnik (2018, 25).

13 Among others, the following researches: Slovenian local dialects in the Surroundings of Skrad, Croatia (3 June 2020–31 December 2020), Research on Slovenian local dialects in the Gorski Kotar (work) (13 November 2020–31 December 2020), Research on Endangered Dialects in the Slovenian Language Space (Radgonski kot, Gradiška, Hum na Sutli and surroundings, Dubravica and surroundings) (1 October 2021–31 August 2024). Within the mentioned surveys, a proven research methodology was used to collect dialectal material, namely both synchronic and diachronic linguistics methods, viz.: 1) guided interview method, i.e. survey method – collecting material in the field directly from local speakers using a pre-prepared questionnaire; 2) the substitution method – for the linguistic analysis of forms adopted from language to language; 3) the etymological method – for the determination of the morphemic structure of lexemes; 4) the comparative method – for the linguistic identification of the material; 5) the structural method – for the determination of the position of a linguistic element within the linguistic plane of the language under study (Gostenčnik et al., 2022, 77).



Figure 1: Extract from the Map of Slovenian dialects (version 2023) – the area of the Čebrenka and Kostel dialects and Ravna Gora (SLA 3.1, 2023, 11).



Legend:

dolenjska narečna skupina = Lower

Carniolan dialect group

čebrensko narečje = Čebrenka
dialect

kostelsko narečje = Kostel dialect

rovtarska narečna skupina = Rovte
dialect group

priseljenski govori v Gorskem

Kotarju = immigrant local dialects in
Gorski Kotar

Figure 2: Extract from the Map of Slovenian dialects (version 2023); Legend (SLA 3.1, 2023, 11).

Kotar area, namely the newly established Slovenian dialect border, which now also extends into Croatia. In this process, exclusively genealogical criteria were used (with the comparative method and method of reconstruction).

Recently, however, some authors (Celinić, Menac-Mihelić, Malnar Jurišić, Marinković) have begun to use the so-called “combined” methodological approach to the geographical determination of language and, more specifically, dialectal borders, which places (more) emphasis on sociolinguistics (and also on the consideration of the national-state border), despite the fact that genealogical linguistic and sociolinguistics are two different branches of linguistics, each with its own theorems and criteria. The local dialects of the Gorski Kotar region have been studied several times, both with the methodologically appropriate, i.e. genealogical approach, and with the so-called “combined” methodological approach, which includes sociolinguistic criteria.

The Čebranka and the Kostel dialect in Gorski Kotar

According to genealogical criteria, the local dialects in the Gorski Kotar part of the region belong to the Lower Carniolan dialect group of the Slovenian language (and not to the Kajkavian dialect group of the Croatian language, as the dialects do not show any typical Kajkavian characteristics). This classification of the local dialects is based on a methodological approach that does not include criteria originally used in other branches of linguistics. Namely, the dialects on the Croatian side of the border are defined as part of the Slovenian linguistic diasystem on the basis of the common linguistic (sound) innovations that delimited Slovenian from the rest of the western South Slavic languages (10th-12th centuries) and the linguistic development until around the 14th century, when the main dialect macro-areas were already formed. All of the treated local dialects studied show defining characteristics of the southern Slovenian dialects or, within them, of the Lower Carniolan dialect macro-area. Within this, individual defining characteristics (older vowel, accent and consonant characteristics and younger linguistic phenomena) link them into two distinct units, that is to say the Čebranka and Kostel dialects (Gostenčnik, 2018; 2020).

In the field of dialectology, this has been supported or acknowledged by various linguists in the past, such as: “The dialects of Fužine, Skrad, Gerovo and Čabar in Gorski kotar show a clearcut southern Slovenian (Lower Carniolan-Inner Carniolan) basis” (Ivić, 1961, 21). “I think we won’t make a mistake if we connect the state of Delnice with the state of Lower Carniolan, and in this way we will have to deal with the whole area from Delnice to Gerovo, Zamost and Prezid, including Babno Polje on the Slovenian side” (Lisac, 2006, 59; translated by Gostenčnik).¹⁴ “The Goran dialect in Gorski Kotar is really Kajkavian only in its smaller eastern part (Lukovdol, Severin na Kupa), while the larger western part (Delnice, Fužine, Čabar, etc.) is actually genetically a Slovenian dialect (i.e. genetically and historically it belongs to the group of dialects that today we call “Slovenian”), which is clearly manifested in the accentuation” (Kapović, 2015, 45; translated by Gostenčnik).¹⁵ Pronk (2010, 129), too, concludes that the Goran local dialects need not be considered mixed and that their native basis is evident if viewed in the context of nearby South Slavic dialects.

On the other hand, some other linguists, while acknowledging the obvious phonetic deviations of the above-mentioned local dialects from the main Kajkavian definitional features, resort to an inappropriate “combined” methodological approach, for example:

For this reason, it is not possible to determine which local dialect belong to Croatian and which to Slovenian solely on the basis of genetic-linguistic criteria. For such a determination it is necessary to introduce an additional criterion. Since the linguistic units into which local languages are divided are called national names, this criterion should be the nationality of the speakers. (Celinić & Menac-Mihalić, 2017, 102; translated by Gostenčnik)¹⁶

How to interpret this phenomenon in the Croatian local dialects, the local dialects of the Croats in the west of Croatia, given the established pattern according to which the progressive shift of the old PS. circumflex is characteristic of the Slovenian language? How is the absence of this phenomenon in the Slovenian local dialects, the local dialects of Slovenes in the east of Slovenia,

14 “Mislim da nećemo pogriješiti povežemo li ipak delničko stanje s dolenjskim, a tako moramo postupati i s čitavim terenom od Delnica prema Gerovu, Zamostu i Prezidu uključujući i Babno Polje na slovenskoj strani” (Lisac, 2006, 59).

15 “Goranski je pak dijalekt u Gorskom kotaru stvarno kajkavski samo na svom manjem istočnom području (Lukovdol, Severin na Kupa), dok je veći zapadni dio (Delnice, Fužine, Čabar itd.) zapravo genetski gledano slovenski dijalekt (tj. genetski i povijesno pripada skupini dijalekata koju danas zovemo “slovenskima”), što se jasno očituje u akcentuaciji” (Kapović, 2015, 45).

16 “Zbog toga isključivim genetskolingvističkim kriterijima nije moguće odrediti koji govor pripada hrvatskom, a koji slovenskom jeziku. Za takvo je određenje nužno uvesti dodatni kriterij. Budući da se jezične jedinice u koje se mjesni govori svrstavaju nazivaju nacionalnim imenima, taj kriterij treba biti nacionalna pripadnost govornika” (Celinić & Menac-Mihalić, 2017, 102).

to be interpreted? (Celinić & Menac-Mihalić, 2017, 92; translated by Gostenčnik)¹⁷

The same is also true of Marija Malnar Jurišić in her review of the monograph Gostenčnik, 2018, who acknowledges that the languages of the area represent a linguistic continuum, but that “it is equally indisputable that the local dialects are spoken by Croats and Slovenians, and that they are spoken in Croatia as well as in Slovenia” (Malnar Jurišić, 2018, 164; translated by Gostenčnik).¹⁸ It is further pointed out that the decision not to burden the monograph with data on the national affiliation of the dialect speakers is not appropriate, as at least those dialect speakers who do not identify themselves nationally should be defined differently than only speakers of the Slovenian language, and a neutral term should be used. For, as she goes on to say, the speakers from the Gorski Kotar area are speakers of local dialects which we classify as Croatian, that is to say, dialects spoken by Croats in the Republic of Croatia, and are thus undoubtedly part of the Kajkavian dialect group of the Croatian language:

In addition, as mentioned above, the author [Januška Gostenčnik, author's note] notes in the introductory part that the research did not include sociolinguistic features, such as the nationality of the respondents. This statement in particular could be somewhat debatable. In the case of the exclusion of national affiliation, i.e. the identification of the speaker (which should not be neglected in this type of research), it is necessary to exclude the naming of linguistic features by national names. It seems logical that the local dialect of speakers who do not identify themselves nationally should be called a neutral term and not be included in the

Slovenian language. Speakers of local dialects from the area of Gorski Kotar are speakers of local dialects that are included in the Croatian language, these are local dialects spoken by Croats in the Republic of Croatia, and as such are undoubtedly part of the Kajkavian dialect and the Croatian language. To call their local dialect Slovenian, i.e. to include it in a dialect defined as Slovenian, which directly implies the exclusion of Croatian (or Kajkavian), is not acceptable at all. When dealing with the newly established Čebranka dialect, it is necessary to take into account the fact that it is spoken by speakers of different nationalities, which raises the question of contact between two closely related languages, and thus the question of how to approach such a problem, in which the national name of the language of another, neighbouring nation is not imposed on the language of one nation. In fact, the set approach can cause (is already causing) unnecessary disputes and have (is already having) bad consequences for mutual relations. It is therefore necessary to revise the existing terminology for the dialectology of the 21st century, which will interpret the state of the organic local dialects in precisely defined and unambiguous terms, without national-linguistic overlaps, and which alone will allow the situation of the linguistic continuum – in which we are connected by numerous isoglosses and not, it seems, separated by a single one – to be used for the unencumbered development of dialectological research in the South Slavic West, as well as for the development of national dialectologies for the future. (Malnar Jurišić, 2018, 165–166; translated by Gostenčnik)¹⁹

17 “Kako interpretirati tu pojavu u hrvatskim govorima, govorima Hrvata na zapadu Hrvatske, s obzirom na ustaljeni obrazac prema kojemu je progresivni pomak starih psl. cirkumfleksa karakteristika slovenskoga jezika? Kako interpretirati izostanak te pojave u slovenskim govorima, govorima Slovenaca na istoku Slovenije?” (Celinić & Menac-Mihalić, 2017, 92).

18 “[A]li je isto tako nesporno da njima govore i Hrvati i Slovenci i da se njima govori i u Hrvatskoj i u Sloveniji” (Malnar Jurišić, 2018, 164).

19 Osim toga, u uvodnom dijelu, kao što je i spomenuto, autorica (Januška Gostenčnik, op. avtorice) napominje kako istraživanje nije uključivalo sociolingvističke značajke, kao npr. narodnost ispitanika. Upravo bi ta konstatacija mogla biti pomalo diskutabilna. Naime, u slučaju isključivanja nacionalne pripadnosti, tj. identifikacije govornika (a što u ovakvom tipu istraživanja ipak ne bi smjelo biti zanemarivo), potrebno je isključiti i imenovanje jezičnih značajka nacionalnim imenom. Čini se tako logičnim da je i govor govornika koji nisu nacionalno determinirani potrebno nazvati neutralnim terminom, a ne uvrstiti ga u slovenski jezik. Govornici govora s područja Gorskoga kotara govornici su mjesnih govora koje ubrajamo u hrvatski jezik, to su govori kojima govore Hrvati u Republici Hrvatskoj i kao takvi nesumnjivo su dijelom kajkavskog narječja i hrvatskog jezika. Nazivanje njihova govora slovenskim, tj. njegovo uvrštavanje u dijalekt koji se definira kao slovenski, a što direktno implicira isključivanje hrvatskog (ili kajkavskog), nije nikako prihvatljivo. U obradi novoutvrđenog čabranskog dijalekta svakako treba uzeti u obzir činjenicu da njime govore govornici različite nacionalne pripadnosti, što otvara problematiku dodira dvaju bliskosrodnih jezika, a samim time i pitanje pristupa takvoj problematici u kojoj se jeziku jednog naroda neće nametati nacionalno ime jezika drugog, susjednog naroda. Postavljeni pristup, naime, može izazvati (već izaziva) i nepotrebne prijepore i imati (već ima) loše posljedice na međusobne odnose. Potrebno je stoga revidirati postojeću terminologiju za dijalektologiju 21. stoljeća, koja će stanje organskih govora interpretirati točno definiranim i nedvosmislenim terminima, bez nacionalnojezičnih presezanja, a što jedino omogućuje da situaciju jezičnoga kontinuuma – u kojem smo povezani brojnim izoglosama, a ni jednom, čini se, razdvojeni – iskoristimo za neopterećen razvoj dijalektoloških istraživanja na južnoslavenskom zapadu, kao i za razvoj nacionalnih dijalektologija za budućnost. (Malnar Jurišić, 2018, 165–166)

Marina Marinković, in her commentary on the same monograph, agrees when she mentions that sociolinguistic criteria have been neglected, i.e. the dialect speaker's self-perception of his or her language. "In the aforementioned Slovenian monograph (i.e. Gostenčnik, 2018, author's note), the classification of the analysed local dialects completely ignored sociolinguistic criteria, i.e. the attitude of the analysed speakers towards their language affiliation, which also leads to incomplete conclusions" (Marinković, 2018, 43; translated by Gostenčnik).²⁰ However, within dialectology itself, the focus cannot be on the so-called linguistic belonging or linguistic identity of the individual/dialect speaker, and the way in which a dialect speaker linguistically identifies himself/herself with a dialect cannot be decisive in determining geographical dialect borders.

Ravna Gora

The local dialect of Ravna Gora in the Gorski Kotar region of Croatia has been discussed several times before.²¹ The first relevant treatment was written by the linguist Nikola Majnarić (1938–1939), who classified it as an immigrant Slovenian Rovte local dialect. Majnarić, as a native speaker of the local dialect of Ravna Gora, cites his own dialectal material, and for each characteristic he also provides information on which Rovte dialect linguistic parallels can be found, drawing information from Fran Ramovš's monograph *Dialekti* (1935), and concludes: "I would just like only that, to determine the place of the local dialects of Ravna Gora among the Slovenian dialects (which will not be so difficult with Ramovš's beautiful and carefully compiled book)" (Majnarić, 1938–1939, 135; translated by Gostenčnik).²²

The most recent treatment is in Gostenčnik (2023),²³ where it is (again) shown that on the basis of its vocalic and consonantal characteristics a local dialect of Ravna Gora cannot be classified as part of a Kajkavian dialect group as it is lacking all typical Kajkavian defining characteristics. On the basis of the old and newly collected dialect

material, Majnarić's classification is confirmed, namely the (immigrant) local dialect is interpreted as part of the Rovte dialect group of the Slovenian language. The local dialect is dialectally classified according to long vowel reflexes and younger accentual withdrawals, as well as some other defining characteristics which, as a cluster, define the Rovte dialects or at least a part of them.

Josip Lisac disagrees with Majnarić's classification, but his argument is sociolinguistic:

Nikola Majnarić (1938–1939, 145) showed that in one part of the town there were mainly settled Slovenes (among whom there were also Slovenised Germans)... Our eminent philologist both local dialects of Ravna Gora (as well as most of the Kajkavian Goran idioms) considers to be Slovenian, which is a scientific position worthy of all respect, but especially if one takes into account the national composition of the population and the use of the Croatian literary language in all activities, a different view of the problem is also possible, which does not allow a closer connection with the so-called central Kajkavian dialects, but justifies the inclusion of the local language of Ravna Gora among the Croatian-Serbian idioms. (Lisac, 1989, 107; translated by Gostenčnik)²⁴

And so on:

The Goran dialect is divided into two sub-dialects, a much smaller eastern one (the area around Lukovdol and Severin na Kupa) and a larger western one (the entire area from Zau-mol and Plemenitaš to the west). Ravna Gora as a whole therefore belongs to the western sub-dialect, but it has a separate, special position within it, and this with regard to the characteristics of the majority of the local dialect of Ravna Gora, which deviates significantly from the average physiognomy of the sub-dialect, while the minority of the local dialects - as we have already mentioned - fits much better into

20 "U spomenutoj slovenskoj monografiji (tj. Gostenčnik, 2018, op. avtorice) pri klasifikaciji analiziranih govora zanemareni su potpuno sociolingvistički kriteriji, odnosno stav ispitanih govornika o njihovoj jezičnoj pripadnosti, što također vodi do nepotpunih zaključaka" (Marinković, 2018, 43).

21 For a summary of all previous treatments, cf. Gostenčnik (2023, 43–51).

22 "Htio bih samo to, da odredim ravnogorskom narječju mjesto među slovenačkim narječjima (što uz lijepu i brižno sastavljenu Ramovšemu knjigu neće više biti ni tako teško" (Majnarić, 1938–1939, 135).

23 Two linguistic systems coexist in Ravna Gora, and this paper focuses on the local dialect of the western (or upper) part.

24 *Nikola Majnarić (1938–1939, 145) pokazao je da su u jednom dijelu mjesta bili u većini doseljeni Slovenci (među kojima je bilo i poslovenjenih Nijemaca) ... Taj naš istaknuti filolog oba ravnogorska govora (kao i većinu kajkavskih goranskih idioma) drži slovenskima što je znanstveni stav vrijedan svakog poštovanja, ali ponajprije ako se uzme u obzir nacionalni sastav stanovništva i uporaba hrvatskoga književnog jezika u svem djelovanju – moguć je i drugačiji pogled na problem koji doduše ne omogućuje prsnije povezivanje s tzv. središnjim kajkavskim dijalektima, međutim ipak opravdava uvrštavanje i ravnogorskoga govora među hrvatskosrpske idiome. (Lisac, 1989, 107)*

the sub-dialect, but we will not deal with it in detail in these concluding considerations. The reasons for the isolation of the majority of the local dialect of Ravna Gora are quite clear and relate to the majority of the ethnic groups that speak this idiom. (Lisac, 1989, 108; translated by Gostenčnik)²⁵

To sum up, Lisac's argument for why the mentioned local dialect does not belong to the Rovte dialect group of the Slovenian language is that the speakers of this local dialect are Croatian by nationality and that they use Croatian literary language in public life.

CONCLUSION

The determination of geographical language (dialectal) borders is one of the tasks of dialectology, and thus the task of the dialectologist. The

knowledge of historical phonetics, the relative chronology of various phonetic phenomena, the use of comparative method and method of reconstruction, as well as a good synchronic knowledge of a given local dialect, is a prerequisite for the relevant placement of a given local dialect within a given dialect. Consequently, the phrase *Slovenian dialects* is also a dialectological term that should be interpreted in a genealogical sense. In the same context, the term *Slovenian language* should also be understood as a set of Slovenian dialects, which should be considered independently of the speaker's place of residence in a particular country, the speaker's nationality, the literary language he or she (primarily) uses, and the speaker's self-perception of his or her local dialect. Dialectology, like any other science, must have clearly defined concepts, clear boundaries between them, and consistent criteria.

25 *Goranski dijalekt dijelimo u dva poddijalekta, mnogo manji istočni (područje oko Lukovdola i Severina na Kupi) i veći zapadni (sav teren od Zaumola i Plemenitaša na zapad). Ravna Gora, dakle, u cjelini pripada zapadnom poddijalektu, ali ima u njem izdvojen, poseban položaj, i to s obzirom na osobine većinskoga ravnogorskoga govora koji znatno odstupa od prosječne fizionomije poddijalekta, dok se manjinski govor u poddijalekt uklapa – kako smo već napomenuli – osjetno bolje, međutim, njime se u ovim zaključnim razmatranjima nećemo opširnije baviti. Uzroci izdvojenosti većinskoga ravnogorskog govora posve su jasni i odnose se na većinu etnosa što tim idiomom govori.* (Lisac, 1989, 108)

K METODOLOGIJI DOLOČANJA ZEMLJEPISNIH JEZIKOVNIH MEJ: PRIMER RAZMEJEVANJA GOVOROV V GORSKEM KOTARJU

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POVZETEK

V prispevku se opredeli dialektologija kot znanost znotraj geneolingvistike, ki predstavlja eno izmed treh (poleg tipolingvistike in sociolingvistike) vej jezikoslovja. Poudarjeno je, da se znotraj dialektologije ne more kombinirati teoremov in kriterijev iz posameznih različnih vej. Jasno se opredeli pomen pridevnika slovenski znotraj besedne zveze (termina) slovenska narečja (slovenski jezik), in sicer vse v kontekstu dialektologije kot jezikoslovne znanstvene discipline, ki mora biti razbremenjena nacionalnih ali sociolingvističnih opredelitev. Kritično se pretrese in ovrednoti dva različna metodološka pristopa, uporabljena pri določanju zemljepisno jezikovnih, natančneje narečnih mej, in sicer na primeru preučevanja slovenskih in hrvaških narečij v Gorskem Kotarju. Prvi metodološki pristop izhaja iz že vzpostavljene metodologije (s primerjalno metodo in metodo rekonstrukcije) znotraj dialektologije kot dela geneolingvistike. Pri nekaterih avtorjih (podani so konkretni primeri) se je namreč v zadnjem času vzpostavil še drugi, t. i. »kombinirani« metodološki pristop, ki združuje dialektološko metodo z metodologijo iz druge veje jezikoslovja, tj. sociolingvistike (tudi ob upoštevanju in sklicevanju na državno-nacionalne meje), ki je neustrezen. Dialektologija mora, kot vse druge znanosti, imeti jasno definirane pojme, postavljene jasne meje med njimi in vzpostavljene dosledne kriterije. V prispevku je tako dialektološko/geneolingvistično utemeljena tudi prenovljena Karta slovenskih narečij (različica 2023).

Ključne besede: slovenska narečja, geneolingvistika, dialektologija, primerjalno slovansko jezikoslovje, jezikovna meja, Slovenski lingvistični atlas

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