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VSEBINA / *INDICE GENERALE / CONTENTS*

Katja Kobolt: The Third Space of Social Reproduction: The Work of Fiction and the Politicisation of Socialist Motherhood 337
Il terzo spazio della riproduzione sociale: Il lavoro della finzione e la politicizzazione della maternità socialista
Tretji prostor družbene reprodukcije: Delo fikcije in politizacija socialističnega materinstva

Jelena Lalatović: Third Space Between Early Socialist Utopia and Environmental Thought of the 1970s: Interpreting Play in the Novel *A Walk Through The Future* via Vygotsky and Caillois 355
Il terzo spazio tra l'utopia del primo socialismo e il pensiero ambientalista degli anni Settanta: interpretare il gioco nel romanzo per l'infanzia Una passeggiata attraverso il futuro *attraverso Vygotsky e Caillois*
Raziskovanje tretjega prostora: interpretacija igre v otroškem romanu Sprehod skozi prihodnost *skozi Vigotskega in Cailloisa*

Tijana Tropin: Urban Space and Third Places in Dragan Lukić's Poetry and Prose 365
Spazio urbano e terzi luoghi nella poesia e nella prosa di Dragan Lukić
Urbani in tretji prostori v poeziji in prozi Dragana Lukića

Dubravka Zima: The Evolution of Child *Flâneur:* Street Smart Kids and the City in Croatian 20th Century Children's Literature 377
L'evoluzione del bambino flâneur*: i bambini street smart e la città nella letteratura per l'infanzia croata del XX secolo*
Razvoj otroka flâneurja*: iznajdljivi otroci z ulice in mesto v hrvaški otroški književnosti 20. stoletja*

Janko Trupej: Slovenska recepcija romana *Koča strica Toma* 387
La ricezione del romanzo La capanna dello zio Tom *in Slovenia*
The Slovenian Reception of Uncle Tom's Cabin

Marija Jurić Pahor: Mladina proti pozabi: vzpostavljanje kulture spominjanja in dialoga med mladimi Slovenkami in Slovenci v Avstriji in Italiji 401
I giovani contro l'oblio: creare una cultura della memoria e del dialogo tra i giovani sloveni in Austria e in Italia
Youth against Oblivion: Building a Culture of Memory and Dialogue among Young Slovenes in Austria and Italy

Barbara Zagorc: Sociološke ovire v razvoju epistemologije urbanega 417
Ostacoli sociologici nello sviluppo dell'epistemologia dell'urbano
Sociological Obstacles in the Development of Urban Epistemology

Maša Filipovič Hrast, Tatjana Rakar, Urban Boljka & Jera Sernel: Changing Welfare Perceptions in Times of Climate Change: The Case of Slovenia 431
Percezioni sul welfare in un contesto di cambiamento climatico: il caso della Slovenia
Spremenjeni pogledi na blaginjo v času podnebnih sprememb: primer Slovenije

Ada Gruntar Jermol:
Exploratory Observations on Metaphorical Convergence in Media Discourse: English-influenced Metaphorical Expression Patterns in German and Slovenian 445
Osservazioni esplorative sulla convergenza metaforica nel discorso mediatico: modelli di espressione metaforica influenzati dall'inglese in tedesco e sloveno
Metaforična konvergenca v medijskem diskurzu: preliminarna opažanja o vplivu angleščine na vzorce metaforičnega izražanja v nemščini in slovenščini

Sonja Vaupot: Mediterranean Toponyms in Translation 459
Toponimi mediterranei in traduzione
Sredozemski toponimi v prevajanju

Blaž Ilc Vrečko: The Ideology of Technology and Its Development Meets the Polycrisis of Modern Capitalism 473
L'ideologia della tecnologia e del suo sviluppo incontra la policrisi del capitalismo moderno
Ideologija tehnologije in njenega razvoja i n polikriza sodobnega kapitalizma

Kazalo k slikam na ovitku 487
Indice delle foto di copertina 487
Index to images on the cover 487

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THE THIRD SPACE OF SOCIAL REPRODUCTION: THE WORK OF FICTION AND THE POLITICISATION OF SOCIALIST MOTHERHOOD

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ABSTRACT

Through a multimodal reading of the spatio-temporal construction of social reproduction in two stories from 1960 by Ela Peroci, illustrated by Ančka Gošnik Godec, and drawing on critical feminist historiography, this article shifts reflection on socialist motherhood away from descriptions of motherhood as an institution and alienated work that predetermines and closes maternal subjectivity. Instead, it examines the constitution of experience and the formation of subjectivities, presenting the work of fiction – that is, the labour of producing fiction – as a wedge for the political: a third space for negotiating care, agency, and futurity.

Keywords: children's literature, artistic work for children, social reproduction, motherhood, childhood, socialism, third space, Ela Peroci, Ančka Gošnik Godec

IL TERZO SPAZIO DELLA RIPRODUZIONE SOCIALE: IL LAVORO DELLA FINZIONE E LA POLITICIZZAZIONE DELLA MATERNITÀ SOCIALISTA

SINTESI

Attraverso una lettura multimodale della costruzione spazio-temporale della riproduzione sociale in due racconti del 1960 di Ela Peroci, illustrati da Ančka Gošnik Godec, e alla luce della storiografia femminista critica, questo articolo riconsidera la maternità socialista andando oltre le descrizioni della maternità che la presentano come un'istituzione e un lavoro alienato, il quale predetermina e circoscrive la soggettività materna. L'analisi si concentra invece sulla costituzione dell'esperienza e sulla formazione delle soggettività, interpretando il lavoro della finzione – cioè il lavoro di produzione della finzione – come un cuneo che apre uno spazio al politico: un terzo spazio in cui negoziare cura, agency e possibilità per il futuro.

Parole chiave: letteratura per l'infanzia, lavoro artistico per l'infanzia, riproduzione sociale, maternità, infanzia, socialismo, terzo spazio, Ela Peroci, Ančka Gošnik Godec

INTRODUCTION[1]

When is Ljubljana at its most beautiful?
In the evening, at noon, or in the morning?
The world is beautiful in the evening. It is covered
in soft shadows, and the last rays of the setting sun
shine in the stream, on the mountain peaks,
in the windows of my house and yours, and
in the clouds in the sky.
When they fade away, darkness slowly descends,
bringing peace and sleep. Nature falls asleep, but
I find my own joy when I turn on the light and
spend a few more hours in its glow.
I would like to take a break from work and worries, to
read a few pages of a beautiful book, to lie by
the window and look at the evening sky,
or to go to the cinema or the theatre.
Someone else might just be starting work
in the evening, before the dark night falls
and no one can resist sleep any longer.
But you, children, have fallen asleep, and no one
noticed when. You look so sweet in your beds,
your cheeks all red. ***I would snuggle up***
to one of you to warm you.
But no. I call you. Wake up! Rub your eyes and come
with me to see what Ljubljana is like in the evening.
(Peroci, 1960, 86)[2]

As the title of the 1960 children's story *Kdaj je Ljubljana najlepša?* [When is Ljubljana at its most beautiful?] by Ela Peroci (1922–2001) suggests, the story takes place in the capital of Slovenia, at that time part of socialist Yugoslavia (1945–1991). The narrator, figured as a mother-author, initially answers the title question by evoking the evening, when the daily rhythm of obligations subsides and leisure becomes possible. Instead of resting, however, she turns to her "joy" (Peroci, 1960, 86): writing fiction. She calls on her children, both the implied listeners of the bedtime story and figures within it, to wake and climb with her to the terrace of Nebotičnik, Ljubljana's first skyscraper, from where they observe the city at night.

Just as the 1933 Nebotičnik had become a symbol of Ljubljana's twentieth-century modernisation, the writing mother and her children – the story's gendered authorial voice and implied listeners – may also be read as figures of modernisation: both were expected to develop new subjectivities during post-war reconstruction and socialist modernisation. The article presents a multimodal reading of various editions of two selected stories by Ela Peroci, first published in 1960 and illustrated by Ančka Gošnik Godec (1927–2025).

The widely translated and canonised Ela Peroci was among the post-war writers in socialist Slovenia and Yugoslavia who not only addressed children and their caregivers within the new social reality but also turned to fantasy as a privileged genre for imagining emerging socialist relations.[3] The modernist and, in particular, socialist discovery and social construction of children as holders of "special psychology" (Alečković, 1955, 364), as "symbolic representatives of societal change" (Ule, 2012, 30), and as "bearers of the future" (Erdei, 2004, 171) was also reflected in the new social relations, which always have spatio-temporal dimensions: who inhabits which spaces, when, and how? These changing social realities were also visible in geographies and temporalities that included or excluded children. The spatial and temporal dimensions of children's and women's lives – especially those of the women who were their primary caregivers – were likewise reflected and (re)imagined in children's fiction. In Ela Peroci's fiction, these were primarily schools, streets, public transport, homes, children's rooms, abandoned houses, seaside campsites, woods, and similar settings. These environments often spilled over into fantasy realms accessible not only to children but also to fantasy creatures – animated toys, animals, and architectural elements – and to women caregivers, especially mothers. The article explores the spatial proximity created between children and mother figures in these shared fantasy spaces in order to examine the spatio-temporal dimensions of social reproduction – that is, the paid and unpaid work through which everyday life, social relationships, norms, and differences, as well as future generations, are sustained. More specifically, it asks how reproductive labour, particularly mothering and the labour of producing

1 This article was prepared as part of the project *Picturing Modernist Future: Women Illustrators and Childhood Conceptions in Socialist Yugoslavia (Follow-up)*, supported by the Recovery and Resilience Plan and funded by the European Union's NextGenerationEU programme (MN-0010-618). The project also supported the editing of the thematic section on third spaces in socialist Yugoslav children's literature in this issue of *Annales, Series Historia et Sociologia*, guest-edited by Katja Kobolt. The article draws on research materials collected within the framework of the Marie Skłodowska-Curie Actions project 101024090 (SOC-ILL).

2 Unless otherwise indicated, all translations and emphases are by the author.

3 In the immediate post-war years, Yugoslav children's literature followed a centralised Soviet model of children's publishing, defined by Maxim Gorky's programme (Alečković, 1955, 367). It mainly addressed children through the experience of the Second World War and the National Liberation Struggle (NOB, 1941–1945) as well as through new socialist social aspirations, in line with socialist realism and social realism. From the 1950s, however, Yugoslav cultural policy on children's literature favoured the fantasy genre.

fiction for children, is portrayed in the selected stories. In doing so, the article demonstrates how women's artistic production for children, or fiction more broadly, created a space for negotiating care, motherhood, and childhood.

First published in 1960, both analysed stories – *Kdaj je Ljubljana najlepša?* and *Za lahko noč* [For a good night] – unfold from conflicts within social reproduction. The stories appeared in two different editions and were illustrated somewhat differently in each.[4] Beyond their shared thematic focus, they were selected because their illustrations were revised across subsequent editions. How did the illustrations change, and what do these visual revisions suggest about how social reproduction, motherhood, and childhood were organised in socialist Yugoslavia? By situating the stories' politicisation of social reproduction within past and contemporary discourses on social reproduction, particularly on motherhood and childhood as well as on artistic work in socialist Yugoslavia, the article aims to offer a productive rereading of the intertwined histories of socialist Yugoslav women's politics, childhood politics, and the politics of social reproduction. Following the 'end of history', these histories were repeatedly rescripted, often through presentism, revisionism, and depoliticisation, producing yet another discontinuity in women's history and obstructing our ability to learn from the past in today's struggles for a more just future.

Conceptually, the article draws on Adrienne Rich's distinction between motherhood as institution and motherhood as a potential relationship (Rich, 1986, 13), together with Henri Lefebvre's (1991) and Homi Bhabha's (2009) concepts of space. It pays analytical attention to spatio-temporal constructions and asks: Where, when, and how are motherhood, childhood, and social reproduction represented in the stories? The article is especially attentive to alternative spaces of motherhood and childhood in which social reproduction, care, self-care, community, and futurity – that is, how the future is imagined – can be negotiated. In further developing Lefebvre's thinking on space, Homi Bhabha conceptualised the potentially emancipatory experience of space as a third space, where politics becomes possible. Henri Lefebvre, who, interestingly, almost simultaneously with his groundbreaking The Production of Space, also researched Yugoslav self-management (Lefebvre, 1975), distinguished three synchronic registers of spatial practice:

I. the physical organisation of space, as defined by everyday activities – or *perceived space*;
II. the perspective of *representations of space* as created and imagined by space-producing specialists; and
III. the *representational spaces* or lived spaces, covering the subjective experience of space in relation to both prior registers – the representations of space and the perceived space (Lefebvre, 1991, 33).

Homi Bhabha adopted this conceptualisation and infused it with Walter Benjamin's concept of translation to develop the third space as "an intercultural site of enunciation, at the intersection of different languages jousting for authority", opening up "a translational space of negotiation through the process of dialogue" (Bhabha, 2009, x). The following reading attends to all three dimensions of the spaces of social reproduction, particularly those of mothering and the labour of producing fiction. Particular attention is given to representational spaces as a potential third space in which difference, agency, alternative spatio-temporal relations, and motherhood as a potential relationship can emerge. The article suggests that the labour of producing fiction offered working mothers in socialist Yugoslavia not only a space in which to make social reproduction politically visible but also one in which to negotiate and potentially resolve its conflicts.

CHILDHOOD AND MOTHERHOOD IN SOCIALISM

Because of the immense suffering of children during the Second World War and its aftermath, and because children under fourteen constituted more than one third of both the post-war global and Yugoslav populations (United Nations, 2024), children became central to post-war peace reconstruction. In the socialist pacifist and feminist political imagination, embodied by organisations such as the Women's International Democratic Federation (founded in 1945), of which Yugoslavia was a member, social protection and care for children underpinned peace reconstruction, modernisation, and women's emancipation (Jeraj, 2005; Tomšič, 1978). The politics of Yugoslav children and Yugoslav women were therefore closely interconnected.

Women's emancipation through paid work and economic independence was to be supported by

4 The two stories first appeared, together with eleven others, in the collection *Ptičke so odletele* [Birds flew away] (1960). They were later included in *Za lahko noč* [For a good night], first published in 1964 and subsequently republished eleven times in Slovene and translated into five other languages (Croatian, Serbian, Bosnian, Hungarian, and Polish).

the gradual socialisation of reproductive labour. At the same time, Yugoslav school reform in the 1950s addressed the care and education of a large young population that at the time spent less than 10 per cent of its time at school (Petrović Todosijević, 2019, 266).[5] Where children should spend the rest of the day, and who should care for them, were therefore social, political, and economic questions. Education and upbringing thus took place not only in schools and children's mass organisations, established following the Soviet model during the war, but also elsewhere. During the UNESCO-supported school reform (1953–1958), education and care extended from the "classroom into the schoolyard, onto the street, into the new residential neighbourhoods, among all the members of the future socialist community" (Petrović Todosijević, 2019, 266), and also into children's media, literature, and culture (Jerbić, 1973). In the pre-digital period, children's literature held an important place in formal education and everyday life; beyond entertainment, it helped imagine new social relations and subjectivities and, as the two stories analysed here show, provided a space for negotiating social reproduction. Yet the family was rearticulated as a privileged site of upbringing and care. Because of post-war housing shortages, extended intergenerational households remained common, although the nuclear family of mother, father, and children living in new modernist apartment blocks gradually became normative.

MOTHERHOOD AND CHILDHOOD THROUGH THE LENS OF WORK: SOCIAL REPRODUCTION

Socialist projects sought to transform all areas of human existence, from political and economic relations to the material conditions of everyday life and relations between people, as well as the relations in and to space, time, and nature. Central to these transformations were changing conceptions and forms of labour, aimed at overcoming so-called alienated work – work over which people lack control and in which they are estranged from that which they produce – in favour of collectively organised, socially meaningful and self-directed activity through which people can realise their capacities as human beings. The socialist reshaping of labour regimes and, with that, of everyday life had spatio-temporal, material, relational, and affective dimensions, as labour is always performed by someone, somewhere, with particular means, often with others, and above all requires time. Efforts to challenge hierarchies between forms of work, expressed in the maxim 'all work has value', also reshaped the relation between paid productive labour and unpaid social reproduction. Women's emancipation was strongly tied to entry into paid work and economic independence, while social reproduction was revalued and, when socialised, also acquired economic recognition. To facilitate women's paid employment, the state gradually socialised parts of reproductive labour through kindergartens, schools, after-school programmes, public kitchens, laundries, and institutions of children's culture. Many women worked in these new institutions and fields, including in children's culture and literature. The socialist challenge to social, economic, material, symbolic, and gendered hierarchies of work also raised questions about the status of artistic labour (Praznik, 2021), including artistic work for children as a feminised field of production (Kobolt, 2023; Lunder, 2025). Compared with autonomous artistic production for adult audiences, children's culture offered women greater opportunities to work as artists. Its gendered dimensions concerned both symbolic valorisation and spatio-temporal organisation: When, where, for whom, and with which materials could women do artistic work? (Kobolt, 2023). These conditions were also shaped by artists' living situations, parenthood, and especially motherhood and its reproductive labour (Kodrnja, 1985; Kobolt, 2023; Lunder, 2025).

Already at the time, and especially in postsocialist scholarship, socialist women's emancipation was regarded as incomplete. Although women increasingly entered paid employment and secured important rights and responsibilities, social reproduction remained primarily their responsibility despite its social recognition, while many of these achievements were later eroded by postsocialist transformations or had to be reclaimed. Like many women today, though under different historical conditions, socialist women also carried the 'double burden' of productive labour and social reproduction. The unequal distribution of reproductive work was criticised at the time, particularly by neo-feminists, who critiqued the inability of economistic Marxism to address the problems of the labour of social reproduction (Ler-Sofronić, 2024; Zaharijević, 2017; Lóránd et al., 2024), including in relation to artistic work (Kodrnja, 1985). Fathers were also urged to take a more active role in care (Petrović Todosijević, 2019), research and political discourse called for greater gender equality and a redistribution of social reproduction (Mihovilović, 1975; Tomšič, 1978; Filipović, 2024).

5 The historian Sanja Petrović Todosijević (2019, 266) points out that in the post-war years, schoolchildren, on average, spent only three hours a day at school for 200 days a year.

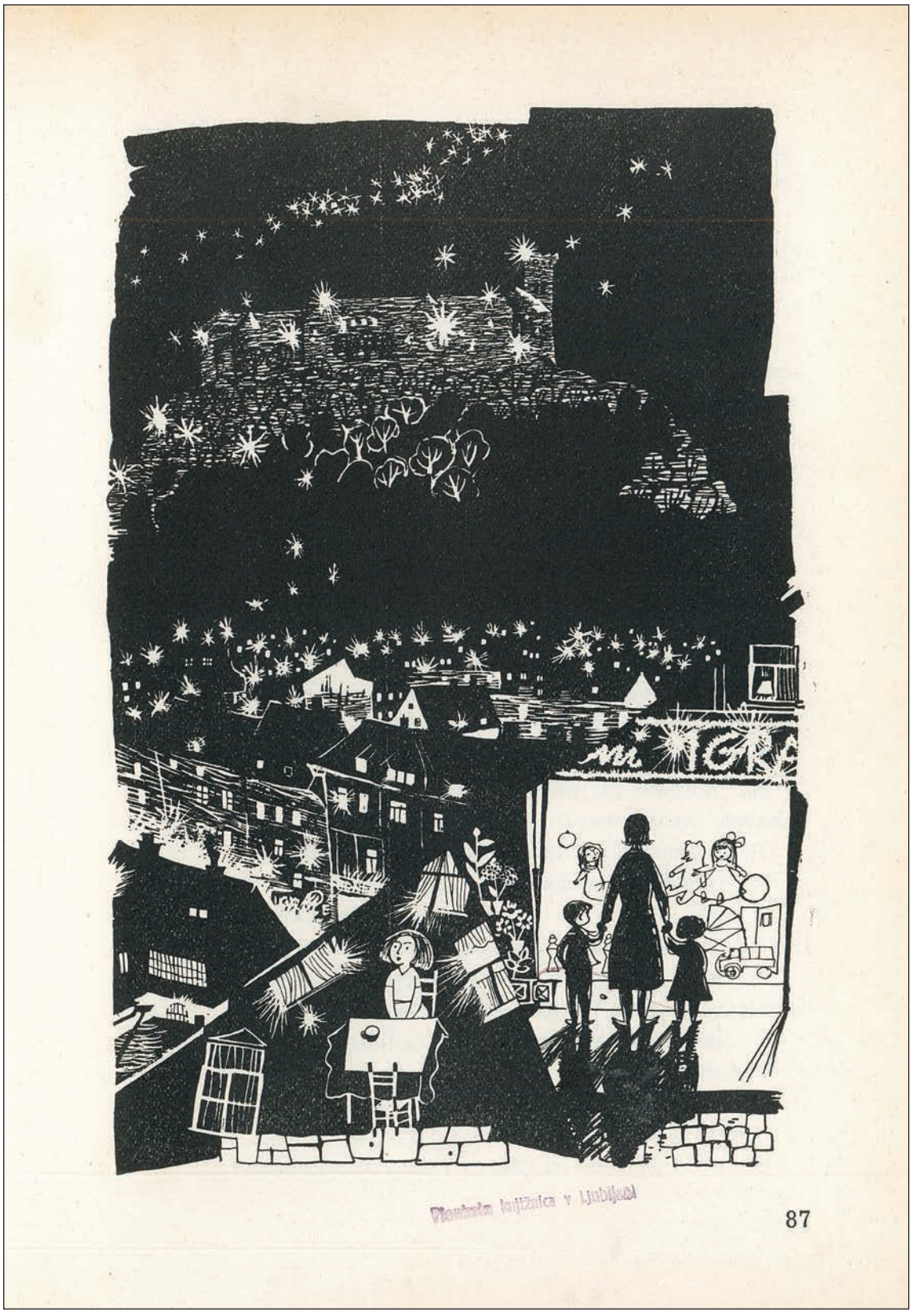


Figure 1: Illustration by Ančka Gošnik Godec for the story* Kdaj je Ljubljana najlepša? *in the collection* Ptičke so odletele *by Ela Peroci (1960).

While contemporary researchers and politicians sought solutions to the problem of social reproduction, later feminist scholarship has criticised the symbolic valorisation of reproductive work, motherhood, and childhood for making it difficult for socialist women to contest their reproductive burden and the normativity of motherhood. Ksenija Vidmar Horvat (2021; 2023), who also drew on Ela Peroci's children's literature, treats motherhood and childhood as central to the Yugoslav socialist politics of affect, moral stability, and futurity. Vidmar Horvat argues that motherhood could not easily become a site of political conflict because it was ideologically valorised and naturalised as a moral and affective feminine obligation (Vidmar Horvat, 2021). In this critique, the social valorisation of social reproduction restricted maternal agency, while challenging traditional motherhood risked delegitimising not only socialist gender politics but the socialist project itself.

This article therefore returns to the question of socialist women's and mothers' agency: How and where could they problematise their burden of social reproduction? By analysing the spatio-temporal representation of social reproduction in children's literature from socialist Yugoslavia, I argue that fiction for children provided women and mothers with a space in which to develop and exercise agency.

Before turning to the analysis, it is useful to clarify the concept of social reproduction and, by extension, its relationship to motherhood, childhood, and artistic work, particularly artistic work for children. Following Rachel Rosen (2023), social reproduction has several meanings. Most basically, it refers to reproduction, care, and upbringing; in education, it can describe the transmission of social norms, class positions and inequalities. A third meaning stresses the continuous work that establishes and maintains the conditions of life and therefore the 'production' of workers, who are always more than labour power (Rosen, 2023, 281). This perspective asks generally: who performs this work, how, with what, where, when, and why? More specifically, it asks who cares for new generations, vulnerable people, and communities; who transfers knowledge and values; and what kinds of subjects emerge. Rosen emphasises the relational and intergenerational character of these processes and treats children not as passive recipients of care but as active participants. Their material, emotional, and reflexive contributions make social reproduction a two-way process of mutual dependence that can both sustain existing relations and open a third space for alternative relations and forms of world-making.

WALKING IN PUBLIC SPACE AS A TRANSFORMATIVE PASSAGE

The introductory illustration (Figure 1) executed in mixed media (india ink, tempera, pen drawing) uses strong black-and-white contrast and expressive lines to juxtapose an intimate domestic scene in the foreground with a panoramic nocturnal view of Ljubljana. Because the mother appears twice, first at the kitchen table imagining a night walk and then walking with her children, the image can be read as a continuous narrative in which the same character appears at different moments within one pictorial field. At the top is the night-time veduta of Ljubljana seen by the mother and children from Nebotičnik.

The implied voice of the author belongs to a woman who, after a hectic day of obligations, sits down to write for children instead of reading "a few pages of a beautiful book", looking "at the evening sky", going "to the cinema or the theatre", or "snuggling with her children". The last gesture marks her as a mother. In an interview about Peroci's creative work, her older daughter Jelka Pogačnik recalled:

> *When I was little, I didn't feel my mother's creative process. She wrote at night when the rest of us were asleep. When I was older, I sometimes saw her writing at the kitchen table or by the stove. When I grew up, we sometimes talked about how tales came to her: how she wrote them down and what was most important to her in her creative process. Apparently, I once very consciously participated in the creation of a tale – I extorted a story. She had to tell me a tale so that I would get up from the pavement and continue the afternoon walk with my little sister in her pushchair.* (Predin, 2012, 2)

"It is no secret that she is referring to the popular story *Slipper Keeper Kitty*, which has sold 140,000 copies to date" (Predin, 2012, 2). The recollection confirms a familiar pattern in gendered artistic labour: when artistic work is not women's primary paid occupation, and especially when they are mothers, it often follows productive and reproductive obligations (Lunder, 2025; Kobolt, 2023). After the Second World War, Peroci worked first as a teacher, mostly with children with disabilities, and later as a journalist, writer, and editor for children's and family periodicals (*Pionir, Ciciban, Mladi svet*) and for children's radio at Radio Ljubljana. She began writing children's fiction after the birth of her two daughters. From her first publications in 1955,



Figure 2: Illustration by Ančka Gošnik Godec for the story* Kdaj je Ljubljana najlepša? *in the collection Ptičke so odletele by Ela Peroci (1960).

Peroci became a frequently published, translated,[6] awarded,[7] adapted,[8] and canonised author in Slovenia and other parts of Yugoslavia. Several stories became widely known picture books, including *Muca copatarica* (*Slipper Keeper Kitty*, 1957, which appeared in 1963 as an edition with new illustrations),[9] *Moj dežnik je lahko balon* (*My Umbrella Can Turn into a Balloon*, 1955), and *Hišica iz kock* [Block house, 1964].

Ančka Gošnik Godec, an academically trained painter and graphic artist with experience in lithography, became one of the most active and awarded children's illustrators in Slovenia and Yugoslavia from the mid-1950s. She illustrated Peroci's work from the first edition of *Muca copatarica* onward and received awards for illustrations of the story volumes *Ptičke so odletele* (1960) and *Za lahko noč* (1964), where both stories analysed here were published.[10]

In other fantasy stories from these collections, children share fantasy spaces with anthropomorphic animals, toys, and animated elements of Ljubljana's architecture. In the two stories analysed here, mothers also gain access to these spaces. In *Kdaj je Ljubljana najlepša?*, the mother-writer herself generates a shared fantasy world with the children through narration on a night-time walk across Ljubljana. As night turns into day, the narrator describes the hectic traffic and life of Titova cesta (Tito Road), where even ships sail and passers-by stroll and window-shop. In front of the department store Narodni magazin (NAMA), another Ljubljana landmark, the narrator-author-mother sits at a desk selling lottery tickets (Figure 2). The only enthusiastic customers are schoolchildren celebrating the first day of school. Public schooling was a central institution and symbol of post-war reconstruction, socialist democratisation, and modernisation, and it also created paid employment for many women. The story ends in the early morning, when "people hurry to work and hope for the best. And this hope shines in their eyes. That's why Ljubljana is most beautiful in the morning" (Peroci, 1960, 96).

Walking thus carries the narrative from fictionalised everyday family and urban spaces to a scene in which the mother-author becomes a lottery seller who can make someone happy each morning. Unlike the illustration in Figure 1, that in Figure 2 does not use a continuous narrative but centres the storyteller-lottery seller in a morning street surrounded by children. The lottery tickets, associated with hope and good fortune, also become a metaphor for fiction, especially children's literature.

Peroci also uses the walk through the urban landscape as a passage from fictionalised factual space into a shared imaginary space for mother and child in the story *Za lahko noč*. A heterodiegetic voice narrates events unfolding on a peaceful afternoon in the home of an extended family: a young girl, Mojca, her mother and father, and her grandparents. The girl plays with a doll, carefully tending to it. However, the doll slips from her hands; after the fall, its eyes, which normally open, remain closed; they have broken. The girl cries out in frustration. Mojca's father reacts first and offers to take his daughter and the doll to have it repaired. However, one of the grandparents expresses doubt and discourages him from going out in the rain. In the first published edition, the black-and-white ink illustration (Figure 3) reveals how the conflict was resolved: in heavy rain, a disgruntled mother takes the girl, carrying the broken doll, through the city to find a shop where it can be repaired.

6 Peroci's works were often published simultaneously with the Slovene originals in other Yugoslav languages–Croatian, Serbian, Bosnian, Macedonian, and Albanian – as well as in the languages of the Yugoslav minority communities, including Slovak, Italian, Hungarian, and Romanian. They were also translated into German, French, Czech, English, Lithuanian, Polish, Finnish, Russian, Spanish, and Esperanto. Her works were additionally published as audiobooks and in Braille.

7 Peroci was included on the International Board on Books for Young People (IBBY) Honour List in 1958 for *Majhno kot mezinec* [Small as a pinky finger], illustrated by Ančka Gošnik Godec, and in 1966 for *Za lahko noč*, illustrated by Ančka Gošnik Godec. In 1970, she and the illustrator Lidija Osterc received the IBBY Medal (IBBY, 1956–1980, 4, 9, 13). In addition, she received the Slovenian Levstik Award in 1956 for *Moj dežnik je lahko balon* (*My Umbrella Can Turn into a Balloon*) and in 1957 for *Tisočkratlepa* [A thousand times beautiful]. In 1971, she received the Prešeren Fund Award, one of Slovenia's highest awards for cultural achievement, for *Na oni strani srebrne črte* [On the other side of the silver line], as well as several awards at the *Zmajeve dječje igre* [Zmaj Children's Games] festival in Novi Sad, Serbia.

8 Ela Peroci's works have been adapted as audiobooks and radio plays nearly 50 times. *Muca copatarica* was adapted for the screen in two animated films, released in 1972 and 2024.

9 The Croatian translation of *Muca Copatarica* appeared simultaneously with the Slovene original in 1957. Italian, German, Serbian, and Macedonian translations followed in 1963. The first English translation was published in 2017 as the picture book *Slipper Keeper Kitty*.

10 Ančka Gošnik Godec illustrated more than 130 children's books. Works featuring her illustrations have been published in the languages of the nations and ethnic groups of the former Yugoslavia, including Slovene, Croatian, Serbian, Bosnian, Macedonian, Albanian, Italian, Hungarian, Bulgarian, Slovak, and Romanian. They have also appeared in German, French, English, Czech, Danish, Dutch, Lithuanian, Arabic, Lower Sorbian, and Esperanto. Gošnik Godec received numerous awards, including the Levstik Award for her illustrations in Ela Peroci's *Ptičke so odletele* and *Za lahko noč*, Ađelka Martić's *Deček in gozd* [The Boy and the Forest], *O treh grahih* [About Three Peas], and *Zlata ptica* [The Golden Bird].

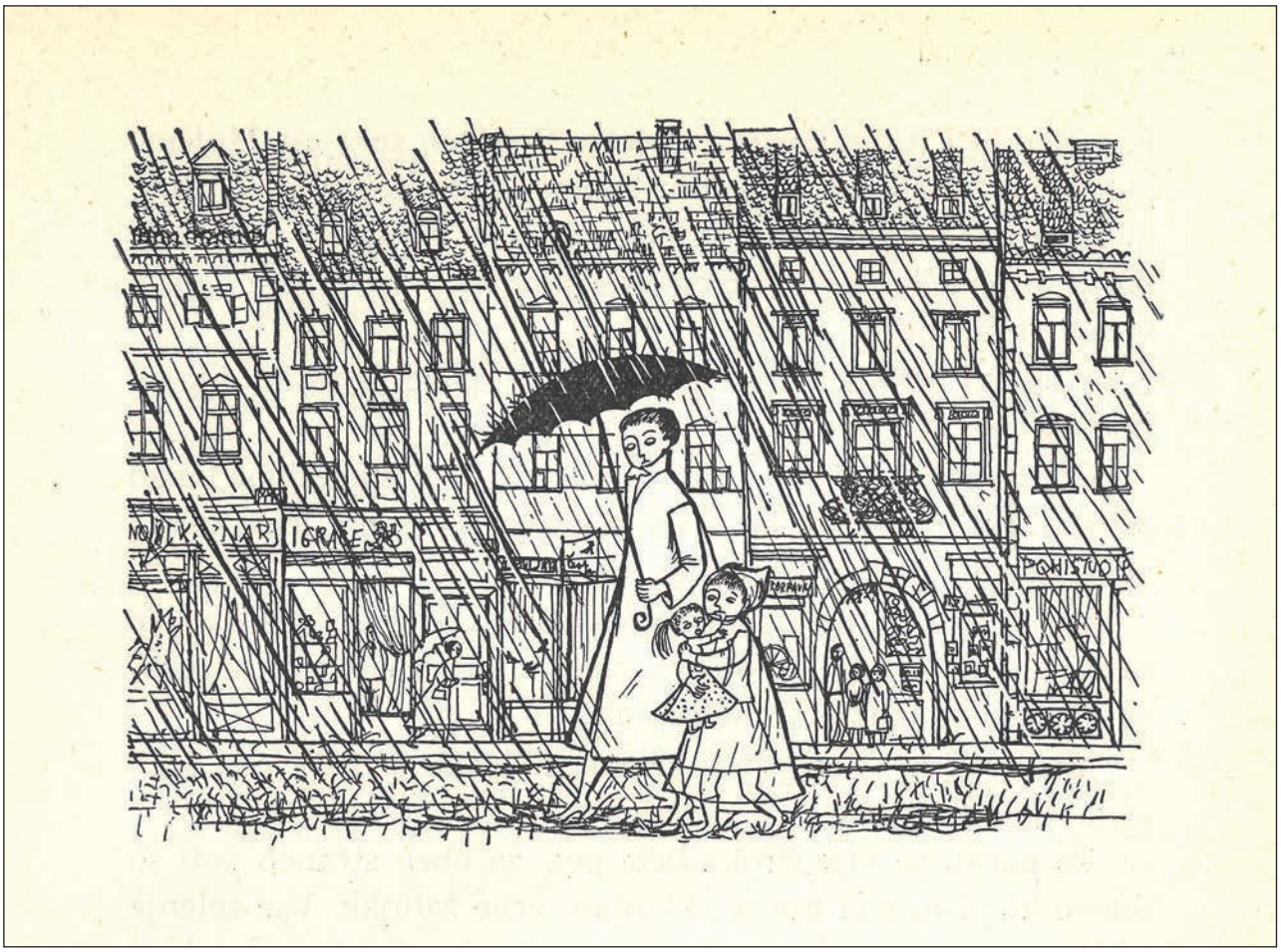


Figure 3: Illustration by Ančka Gošnik Godec for the story* Za lahko noč *in the collection* Ptičke so odletele *by Ela Peroci (1960).

The father delegates the doll repair to his wife, Mojca's mother:

'Actually, you could go with her, I have urgent work to do,' he said to the mother, and she knew very well that he didn't want to go out in the rain.
She didn't feel like going either. She had already been looking forward to Mojca and her father leaving so that she could have some peace and quiet. She wanted to read Andersen's fairy tales; that was her greatest pleasure. But she had promised Mojca, or rather, her father had promised her.
Mojca waits, clutching her blind doll.
Her mother sighs, takes an umbrella and sets off with Mojca into the rain.
They walk along the wet street until they reach a toy shop. They go in and ask if the doll can be repaired. When they are told it cannot, they try another shop. Their umbrellas are wet. The rain is so heavy that it pours off them. They jump over puddles for a while, but then they stop. They step into the biggest puddles. Mojca does it because she enjoys it, and her mother does it because she is in a bad mood.
They get wet up to their knees. (Peroci, 1960, 67)

After the mother and daughter find a shop where the doll can be repaired, the rain stops, leaving behind big puddles. As they deliberately jump into the biggest puddles, the mother's mood also changes from bad to cheerful. They continue to Ljubljana's Tivoli Park. There they pass the infamous cast-iron dog sculptures – the four ancient Molossian hounds that guard the entrance to the mansion at the top of the stairs. According to urban legend, the artist Anton Dominik von Fernkorn (1813–1878) forgot to give them tongues, and the shame supposedly drove him to suicide (Kermavnar, 2018). "'They are never happy. They have no tongue. But I love them,' Mojca says to her mother. Then they climb the stairs to the top" (Peroci,



Figure 4: Illustration by Ančka Gošnik Godec for the story* Za lahko noč *in the collection* Ptičke so odletele *by Ela Peroci (1960).

1960, 68). Yet the staircase, which usually leads them to the path into the woods, seems endless. They climb and climb until they find themselves before an unknown city (Figure 4). They join hands and enter through the city gate – a portal with a golden orb suspended within the arch.

They see unusual, leaning, colourful houses arranged without apparent order, where children live together with animated toys. Through expressive contour drawing, decorative ornamentation, compressed and flattened spatial organisation, and a continuous narrative composition, the illustration combines graphic precision with lyrical fantasy, using rhythmic line work and symbolic motifs rather than naturalistic modelling. The architecture functions almost like a theatrical stage or story map: interior and exterior spaces merge, scale shifts freely, and large anthropomorphic suns oversee the scene. The image invites the reader to wander through it rather than read it from a single fixed viewpoint.

The children have built the houses in the magical city from blocks; some lack doors and windows, and suns decorate their façades. At a house with three painted suns, a talking toy bear in an apron tells Mojca and her mother that they have reached the Sun City, where the suns represent children's parents. The bear and a blind toy deer care for the wet visitors. The bear explains that children spend most of the day outside while their toys stay home to cook and clean. Asked by the blind deer what the world looks like, the mother describes its colours but also complains that in cities with tall houses people cannot find peace. She links this to her crowded home and lack of self-defined free time: "For a whole month now, I've been longing for a little peace and quiet so I can read fairy tales, but there's no peace to be

found anywhere. There are so many of us in the house that we get in each other's way" (Peroci, 1960, 71). Even after their clothes dry, she delays leaving and continues describing Mojca, the broken doll, and the privilege of being able to read and daydream undisturbed (Peroci, 1960, 74). Mojca interrupts when the blind deer asks to accompany them to have its eyes repaired. Meanwhile, the girl Špelca, who lives with the bear and the deer in the house, returns from fishing, and the bear begins to cook, but the fish escapes through the window, leaving a pearl behind. Mother and daughter look through books; the mother asks to be left alone to read, and Mojca watches the landscape from the window. As darkness falls, Mojca becomes frightened and asks why they are not asleep. The mother persuades her to draw for a while longer. Only when she sees Mojca's drawing of a girl, a house, and a sun representing her mother shining on her little sister does she stop reading, moved almost to tears. They collect the blind deer and hurry home, where the worried family awaits.

While the illustration of the Sun City (Figure 4) employs a continuous narrative composition – the girl and mother climbing the stairs, the Sun City and its portal, and the events in the house with three suns – the subsequent illustration (Figure 5) focuses on a detail: the daughter with a blind toy deer from the magical city and the mother in the park, the factual world infused with fantasy.

Magic follows the mother and the daughter back into Tivoli and the city (Figure 5): goldfish fly above the fountain, the mother imagines Mojca one day flying from her birthplace "like a tiny bird" (Peroci, 1960, 77), and the tongueless dogs



Figure 5: Illustration by Ančka Gošnik Godec for the story* Za lahko noč *in the collection* Ptičke so odletele *by Ela Peroci (1960).

follow them home to guard the house. Before going to sleep, Mojca calls all the family members the suns of both herself and her mother. Her father replies that his daughter and wife are his sun and that he could not live without them. The family then wishes one another good night.

ARTISTIC WORK FOR CHILDREN AS A WEDGE INTO THE THIRD SPACE

Both stories are built around the conflict between mothers' social reproductive work and their free time. In *Kdaj je Ljubljana najlepša?*, instead of taking a "break from work and worries" to "read a few pages of a good book", the mother turns to writing fiction, through which she transforms fictionalised factual urban space into a magical space for herself and the children. In *Za lahko noč*, the mother looks forward to some peace while her husband and daughter take the doll for repair, hoping to read Andersen's tales, "her greatest joy". She cannot experience this joy, however, until she walks through public space with her child and opens herself to the child's perspective; in the shared fantasy space, where animated toys take care of children, the mother finally reads (Peroci, 1960, 66). As is usual in Peroci's stories, the father plays only a minor role. Yet it is he who delegates care of the girl to the mother, depriving her of the pleasure of reading by sending her into the rain with their daughter.

The narration and the black-and-white illustrations (Figures 3–5) in the original 1960 edition of *Za lahko noč* portray all three spatial registers identified by Henri Lefebvre (1991). They depict perceived space, shaped by habitual family relations; representations of space, embodied by the rainy streets of fictionalised Ljubljana where mother and daughter search for a repair shop; and representational or lived spaces, formed by Tivoli Park and the Sun City, where they enter fantasy before returning home. This last register is a subjective experience produced in relation to the other two.

In the 1960 edition, the mother's bitterness at leaving home to deal with the broken doll instead of reading is also conveyed visually (Figure 3): a distressed mother and daughter search the rainy streets for a repair shop. However, this illustration, which zooms in on the mother and girl walking through Ljubljana's empty, rain-soaked streets, has been absent from editions published since the illustrations were revised in 1964. Instead, editions published since 1964 present a colourful illustration of mother and daughter arriving in the Sun City (Figure 6). Since 1964, the story has included only two illustrations – one black-ink illustration and one mixed-media full-colour mixed-media illustration – both depicting only the fantasy space of the Sun City: the representational spaces.

The visual revisions of *Kdaj je Ljubljana najlepša?* likewise removed the original 1960 illustrations from the 1964 edition onward. The composite image that depicted, beneath the veduta of Ljubljana, a mother writing in the glow of a light bulb and imagining a night walk with her children (Figure 1) was altered. The 1960 illustrations combined representations of space and perceived space structured by habitual family relations, in which it is a mother who can sit down to write only in the evening; and the representational spaces of the mother and children's fantasy-infused walk through Ljubljana's public space. Later editions also omit the illustration in which the mother-author appears in public as a lottery-ticket seller, another image of representational spaces, leaving as the story's only illustration the veduta of Ljubljana. However, instead of night, it is day: a huge sun is shining on Ljubljana Castle.

To answer the question about how the described visual revisions are to be read in the context of socialist Yugoslav children's and women's politics, we should also look at focalisation: from whose perspective is the action seen? At the beginning of both stories, the narration and, in the 1960 edition, the illustrations are also focalised through the mother's affective perspective: in Figure 1, the mother sits down in the evening to write; in Figure 3, the disgruntled mother walks with her daughter through the rain to have the doll repaired. The 1960 illustrations thus foreground the maternal perspective on the initial conflict and visually trace the passage from Ljubljana's fictionalised factual space into a fantasy space encompassing both maternal and child perspectives. By contrast, the two illustrations used from 1964 onward depict only the fantasy space. In *Kdaj je Ljubljana najlepša?*, through her narration, the writing mother opens a space for the children in which they take a night walk together and she becomes a lottery-ticket seller. In *Za lahko noč*, the mother's receptiveness to her daughter's perspective opens a magical Sun City. In both stories, the walk enables the passage from representations of space and perceived space to representational spaces, with a shared perspective between mother and child: both are fascinated by the magical space. In both stories and in the illustrations in Figures 2 and 4–6, this shared perspective opens a space not only for children to play but also for mothers to problematise the burden of social reproduction and enjoy writing and reading children's literature, respectively. The extension of focalisation to a

perspective shared by mother and child indicates relationality.

Read through Lefebvre's spatial practices and Bhabha's third space, these stories make visible the negotiation of social reproduction as maternal work. In the perceived space of habitual family relations, the mother has no time to read or can write only at night. A walk from the familiar family home through public urban space or perceived space generates a representational fantasy space shared by mother and children. Whereas children's literature has often figured passage into imaginary space as a departure from family security and thus a danger,[11] in Peroci's fiction and Gošnik Godec's illustrations, the shared passage is not only pleasurable for children but also transforms space for the mother. It opens a site where motherhood as institution can be negotiated in relation to motherhood as a potential relationship. The joint walks through built urban environment produce a shared, though not identical, subjective space in which both maternal and child perspectives coexist. This third space enables children to play and mothers to enjoy writing and reading fiction, respectively. The stories therefore support feminist accounts of motherhood and childhood as an affective infrastructure of socialism and as carriers of political imaginaries of the future (Vidmar Horvat, 2021), while also showing social reproduction itself being contested and reimagined as relational.

It is narration – in *Kdaj je Ljubljana najlepša?*, explicitly the mother's labour of producing fiction – that makes possible the expansion of motherhood from institution towards relation and experience, based on love, shared but not identical perspectives, intimacy, and creativity, without hiding the structural, relational, and affective complexity and ambivalence of motherhood or its political potential. The symbolism of parent-suns, drawn from Christian iconography in which the sun represents divine love and authority, does not resolve the tensions within the family as a site of social reproduction; rather, it extends this symbolism to all members of the family. When Mojca calls all her family members her suns and the father replies that she and her mother are his suns, the symbolism shifts from parental authority towards relationality among family members. However, the visual revisions introduced in 1964 make the family less visible as a site of conflict over social reproduction, thereby encouraging readers to focus on the fantasy space and adopt the child's perspective at the expense of the mother's.

CONCLUSION

The analysis of the spatio-temporal dimensions of social reproduction in *Kdaj je Ljubljana najlepša?* and *Za lahko noč* reveals narration and fiction as transformative passages, enacted through the mothers' walks with children through public space, from the perceived space of the socialist family, through representations of Ljubljana's urban topography, to representational fantasy spaces, where maternal and child perspectives can be negotiated. The mother's opening towards the child's perspective, explicitly through narration and writing for children in one story, becomes a wedge into the third space: a transgressive operation (Iser, 1993, 4) between the real, motherhood as institution, and the imaginary, motherhood as potential experience.

The labour of producing fiction may therefore constitute a third burden for the working mother. At the same time, by negotiating the child's perspective, the labour of producing fiction enables mothers both to problematise motherhood as institution and to reimagine it as experience and relational practice, as "a translational space of negotiation through the process of dialogue" (Bhabha, 2009, x). In this reading, social reproduction (Rosen, 2023) appears as (i) relational care, (ii) the transfer of knowledge and values open to different perspectives, and (iii) the negotiated production of subjectivities not confined to predefined positions but open to alternative forms of world-making. Revisiting selected fiction by Ela Peroci from the socialist Yugoslav era through the lens of social reproduction – and attending to artistic work for children – recentres it as socially and politically relevant relational work and as a space for the ongoing political struggle to dismantle enforced hierarchies between forms of work deemed more or less important and subjectivities deemed more or less self-defined. In line with proposals from critical feminist historiography (Mohanty, 1993; Scott, 1991), such an approach moves theoretical reflection on socialist motherhood from descriptions of motherhood as something that predetermines and closes maternal subjectivities to the interrogation of the constitution of experiences and the formation of subjectivities, thereby revealing the work of fiction as a wedge for the political – a third space for negotiating care, agency, and futurity.

11 The arcadia of socialist modernisation was often located in urban spaces and sometimes, particularly in avant-garde works, incorporated technological innovations, as in Aleksandar Vučo and Dušan Matić's 1933 *Podvizi družine "Pet petlića"* (*The Fine Feats of the 'Five Cockerels' Gang*).



Figure 6: Colour illustration by Ančka Gošnik Godec for the story* Za lahko noč *in the collection* Za lahko noč *by Ela Peroci (since 1964).

This reading does not overturn the socialist symbolic valorisation of reproductive work and motherhood as central to Yugoslav socialist politics of affect and moral stability, especially in relation to traditional gender roles within the family, or of childhood as the reproduction of the future (Vidmar Horvat, 2021; 2023). Rather, it shows that socialist Yugoslav conceptions of motherhood and childhood were dynamic, thereby recentring these questions within a more differentiated understanding and pointing to the need for a critical reconsideration of liberal conceptions of motherhood that often position women as victims through motherhood. Such a reconsideration is especially urgent in comparative historical perspective, as globalised exploitation, extraction, patriarchal authoritarianism, populism, and warfare again disproportionately expose children and women to harm.

TRETJI PROSTOR DRUŽBENE REPRODUKCIJE: DELO FIKCIJE IN POLITIZACIJA SOCIALISTIČNEGA MATERINSTVA

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POVZETEK

V besedilu z multimodalnim branjem dveh zgodb Ele Peroci – Kdaj je Ljubljana najlepša? *(1960) in* Za lahko noč *(1960) – ter ilustracij, s katerimi je Ančka Gošnik Godec zgodbi opremila v različnih izdajah, obravnavam prostorsko-časovne razsežnosti družbene reprodukcije, materinstva in otroštva ter umetniškega dela za otroke v socialistični Jugoslaviji. Pri analizi se opiram na takratne in sodobne študije materinstva ter družbene reprodukcije. Izhajam iz ugotovitev o družbenem in moralnem vrednotenju ter naturalizaciji materinstva, otroštva in skrbstvenega dela kot osrednjih stebrov jugoslovanske socialistične afektivne politike spolov in prihodnosti, pa tudi moralne stabilnosti. Takšno vrednotenje naj bi omejevalo delovalnost socialističnih mater ter oteževalo problematizacijo materinstva in družbene reprodukcije, – nalog, ki so jih matere predvsem znotraj družin kljub plačanemu delu, ekonomski neodvisnosti ter pridobljenim pravicam in odgovornostim tudi takrat večinoma opravljale same. Družbeno reprodukcijo razumem kot relacijski proces, zato prostorsko-časovno analizo zgodb umestim v teorijo prostora Henrija Lefebvra ter koncept tretjega prostora Homija Bhabhe. Pokažem, kako sta feminizirani področji dela fikcije in umetniškega ustvarjanja za otroke odpirali tretji prostor za premišljanje, problematizacijo in usklajevanje materinstva, skrbstvenega dela, otroštva in prostega časa. V tem prostoru se materinstvo ne kaže zgolj kot institucija in odtujeno delo, ki materinsko subjektivnost vnaprej določa in omejuje, temveč tudi kot relacijska izkušnja, ki odpira možnosti za preizpraševanje in politizacijo skrbi, utrujenosti, želj, ustvarjalnosti in skupnosti. V članku zato predlagam drugačno razumevanje socialističnega materinstva ter kritičen premislek o liberalnih in konservativnih pojmovanjih in politikah materinstva ter družbene reprodukcije, ki pogosto prav prek slednjih ženske na različne načine viktimizirajo.*

Ključne besede: otroška književnost, delo umetnosti, družbena reprodukcija, materinstvo, otroštvo, socializem, Ela Peroci, Ančka Gošnik Godec

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THIRD SPACE BETWEEN EARLY SOCIALIST UTOPIA AND ENVIRONMENTAL THOUGHT OF THE 1970S: INTERPRETING PLAY IN THE NOVEL *A WALK THROUGH THE FUTURE* VIA VYGOTSKY AND CAILLOIS

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ABSTRACT

This paper examines the symbolic, social, and political dimensions of play in the children's novel Šetnja kroz budućnost (A Walk through the Future), originally published in instalments in 1924–1925 and attributed to the Serbian social democrat and union educator Dragutin Vladisavljević. Existing research has identified this novel as the first science-fiction social utopia in children's literature within the Serbian and broader Yugoslav context. The aim of this paper is to explore how two distinct theories of play – one articulated by Soviet psychologist Lev Vygotsky and the other proposed by French literary theorist Roger Caillois – can contribute to a more nuanced understanding of liminal, or third spaces in the narrative. Lastly, the paper examines how this poetics of space enables insight into the novel's proto-ecological imagery and proto-environmental consciousness.

Keywords: theory of play, third space, liminality, Lev Vygotsky, Roger Caillois, utopian literature, children's literature, ecological imagery

IL TERZO SPAZIO TRA L'UTOPIA DEL PRIMO SOCIALISMO E IL PENSIERO AMBIENTALISTA DEGLI ANNI SETTANTA: INTERPRETARE IL GIOCO NEL ROMANZO PER L'INFANZIA *UNA PASSEGGIATA ATTRAVERSO IL FUTURO* ATTRAVERSO VYGOTSKY E CAILLOIS

SINTESI

Questo articolo esamina le dimensioni simboliche, sociali e politiche del gioco nel romanzo per l'infanzia Šetnja kroz budućnost *(Una passeggiata attraverso il futuro), pubblicato originariamente a puntate tra il 1924 e il 1925 e attribuito al socialdemocratico serbo, nonché educatore sindacale, Dragutin Vladisavljević. Le ricerche svolte finora hanno identificato questo romanzo come la prima utopia sociale fantascientifica nella letteratura per l'infanzia in Serbia e nel più ampio contesto jugoslavo. L'obiettivo di questo contributo è esplorare come due distinte teorie del gioco — quella elaborata dallo psicologo sovietico Lev Vygotsky e quella proposta dal critico letterario francese Roger Caillois — possano contribuire a una comprensione più approfondita degli spazi liminali, o terzi spazi, presenti nella narrazione. Infine, l'articolo esamina come questa poetica dello spazio permetta di cogliere l'immaginario proto-ecologico e la coscienza proto-ambientalista in questo testo.*

Parole chiave: teoria del gioco, terzo spazio, liminalità, Lev Vygotsky, Roger Caillois, letteratura utopica, letteratura per l'infanzia, immaginario ecologico

INTRODUCTION

We live in an age in which environmentalist and ecological discourses have become omnipresent, at least in civil society and academia. Nevertheless, mainstream environmental consciousness-raising is often reduced to a mechanism for establishing hierarchies of morality: between those who eat meat and those who do not, or in debates over who generates a larger carbon footprint, thereby sidestepping the crucial relationship between political economy and major ecological issues such as climate change and pollution. To put it simply, the critique of "anthropocentric ideologies" (Oppermann, 2023) has replaced the critique of the capitalist mode of production. This situation may be interpreted as indicative of a deeper crisis. Contemporary ecological discourses tend to reproduce themselves by describing current catastrophes and imagining future disasters, appealing primarily to the fearful aspects of human consciousness rather than to those that foster hope and change. As readers, we risk conflating environmental awareness with catastrophism, which in turn diminishes our sensitivity and receptivity to ecological imageries that do not stem from a sense of guilt and urgency. In general, many dystopian narratives endorse a predominantly individualistic approach (cf. Haraway, 2016), appealing primarily to personal morality. This applies equally to the intellectual current associated with the concept of Anthropocene, namely Ecomodernism. Although its point of departure – the claim that technology is ethically neutral and can therefore be harnessed to mitigate the effects of industrialisation – appears compelling, it ultimately remains an individualistic framework (Asafu-Adjaye et al., 2015, 7). Even if technology could be conceived as neutral in the abstract, the corporations that develop and deploy these technologies for profit are not. The central problem, then, is how, under such conditions, we might constitute a collective subject capable of challenging and disempowering technological monopolies? Most ecomodernist approaches leave this question unaddressed. Nevertheless, narratives grounded in faith in human potential tend to imagine a new collective subjectivity capable of preventing or combating forthcoming disasters. In most cases, their starting point is an attempt to reconstruct or create meaningful social relationships that the capitalist mode of production has systematically eroded. *Šetnja kroz budućnost* (*A Walk Through the Future*),[1] the first science-fiction social utopian narrative in Serbian literature, fosters such imagery. This short novel was initially published in instalments in the children's magazine *Budućnost* [*Future*], 1920; 1923–1929. This magazine's subtitle explicitly labelled it as "the magazine of the organised workers' children." By using this subtitle, the editorship emphasised trade unionism as a fundamental prerequisite for an independent, working-class culture. *A Walk through the Future* is undoubtedly one of this culture's most valuable legacies, ahead of its time and unknown until 2017, when Biljana Andonovska discovered it and introduced it to the research community. She notes that this short novel was published in eight instalments, from June 1924 to April 2025, underscoring both the novel's and the magazine's potential for reassessment of the genres' development in Serbian literary history (Andonovska, 2019, 45). The novel's presumed author is Dragutin Vladisavljević, Serbian social democrat, physician, and workers' educator, whose fictional voice is concealed behind the nickname of a girl protagonist, Mala Zora (Little Zora). In this novel, the protagonist, the girl Mala Zora, falls asleep before the May Day celebration and travels to the future, set in 2024. In this symbolism, comparative literature researchers (Andonovska & Tropin, 2022) would recognise an echo of one of the most influential socialist-utopian narratives, William Morris' *News from Nowhere* (1890). The protagonist's visit to the future society is also motivated by sleep. The societal progress in Morris' narrative is not mirrored by technological development. Quite the opposite, the advancement is reflected in the future society's capacity to curb technological progress in order to preserve natural resources and human well-being. Having found himself in future London, Morris' protagonist first notices the clean water in the otherwise severely polluted River Thames. This symbolism explicitly corresponds with Morris' proto-environmentalist stance, which he also articulated in his review of Edward Bellamy's utopian novel *Looking Backward*, 1888 Morris' commentary was published in the *Commonweal* newspapers, 1885–1894, and the article explains why uncritical celebration of technological advancement, which Bellamy understands as one of the core features of his socialist utopia, can be, at the same time, structurally divorced from a truly working-class and anticapitalist perspective:

> *So looked at, Mr Bellamy's utopia must be still called very interesting, as it is constructed with due economical knowledge, and with much adroitness; and of course his temperament is that of many thousands of people. This temperament may be called*

1 Among researchers, the idea that Dragutin Vladisavljević is the author of this narrative is widely accepted. However, in every edition, including the first bilingual monograph edition from 2024, the narrative is 'signed' by the girl protagonist, Mala Zora (Little Zora). I consistently quote from this edition, the English version.

the unmixed modern one, unhistoric and unartistic; it makes its owner (if a Socialist) perfectly satisfied with modern civilization, if only the injustice, misery, and waste of class society could be got rid of; which half-change seems possible to him. The only ideal of life which such a man can see is that of the industrious professional middle-class men of to-clay purified from their crime of complicity with the monopolist class, and become independent instead of being, as they now are, parasitical. It is not to be denied that if such an ideal could be realised, it would be a great improvement on the present society. But can it be realised? It means in fact the alteration of the machinery of life in such a way that all men shall be allowed to share in the fullness of that life, for the production and upholding of which the machinery was instituted. (Morris, 1889)

This quotation makes several key points that are vital to interpreting the entanglement of play, space, and environmental imagery in Dragutin Vladisavljević's narrative. The essence of Morris's argument, which can also be found both in his own fiction and in that of Dragutin Vladisavljević, lies in shifting the focus from the question of bureaucratic or industrial progress to the experience and quality of life. Humour and moral insight in both stories emerge from the discrepancy between the protagonists' previously degrading experiences and the more humane living conditions of the futuristic setting. Morris openly criticises Bellamy for equating civilisation with capitalist, urbanised modernity and for identifying shorter working hours as the sole means of making labour less burdensome for workers. In other words, besides shifting the focus from productivity to fulfilment, another essential point of Morris' criticism, consistently found in *A Walk Through the Future* as well, is that the mindset liberation must be followed by spatial liberation, meaning setting oneself free from the places of capitalist profit-driven coercion. One such space is "the old school", with the aim of turning children into compliant, disciplined workers. Vladisavljević's text, conceptualised primarily as a pedagogical utopia, shows that unmediated contact with nature and finding satisfaction and joy in work are fundamental to emancipatory education and upbringing. Morris' influence on this Balkan socialist is practically self-evident and has already been noted in the scholarly literature (Andonovska & Tropin, 2022, 160). However, a less obvious aspect is that both ecological utopias also strongly resonate with the intellectual legacy of the environmentalist movements of the 1970s.

In the following section, I will argue that ecological theory and critiques of globalisation enable us to identify key concepts for interpreting proto-environmentalist utopias. Then, I will demonstrate how the idea of *third space* connects to the theories of play developed by Vygotsky in his essay "Imagination and Creativity in Childhood", originally published in 1926, and Caillois in *Les jeux et les hommes* (Man, Play and Games) from 1958, and why the spirit of play, as they understand it, is essential to the creation of democratic institutions in (future) society. Finally, I will elaborate on how eco-theories of the 1970s contribute to the interpretation of the novel *A Walk Through the Future*.

THIRD SPACE AND THE RIGHT TO EXIST AS A SOCIAL BEING

The period between Paul B. Sears' provocative essay "Ecology – A Subversive Subject" (Sears, 1964) and the first United Nations Conference on the Human Environment in 1972, in Stockholm, was the moment when, for the first time in human history, scientists and intellectuals institutionally recognised that economic growth must be limited to preserve the biosphere. Nevertheless, ecological theory in the 1970s did not resort to catastrophism or appeal primarily to individual morality; instead, it continued to draw on the wave of massive leftist movements of the twentieth century and retained its faith in the power of the collective subject. This anthropological optimism is also reflected in the title of Lester Brown's pioneering study, *World Without Borders* (Brown, 1979), one of the earliest studies on the socio-economic impacts of environmental issues. The title of this book is not just a metaphor for humanist or internationalist ideologies. Instead, it reflects a new reality brought about by globalisation. As Brown remarks, the concept of permanent economic growth, followed by continuous rises in living standards, has permeated every corner of the Earth. The price for this growth, which nevertheless failed to eradicate famine and poverty, was excessive exploitation of natural resources that endangered the biosphere, reminding communities across the world of how entangled they are. He quotes the example of the Danish celebration of the storks' return from Africa. However, in 1969, only 70 pairs of storks returned to Denmark (down from 10,000 previously), as pesticides used against locusts along the Nile River poisoned the majority of the stork population (Brown, 1979, 31). Nevertheless, Brown identifies the unity of the biosphere, as opposed to the borders as socio-political constructs, as a source of activist hope. The globalisation of the economy led to the reconfiguration of boundaries between private and communal life. As early as 1973, Andre Gorz, an Austrian-French social theoretician widely

known for his concept of *difficult socialism*, wrote about how the development of the car industry turned cities into a living hell:

> *For entire generations, the large city was an object of fascination, the only place worth living in. Why did this reversal occur? For a single reason: the automobile made cities unendurable. Because of cars, cities became foul-smelling, noisy, suffocating, dusty, and congested – to such an extent that people no longer feel the desire to go out in the evening. Then, once automobiles had killed the cities, even more cars, faster ones at that, became necessary in order to escape from them onto highways, toward ever more distant suburbs*. (Gorz, 1982, 102)

Here, Gorz describes the same impact of industrial development on private and communal life that American sociologist Ray Oldenburg witfully encapsulated as the exchange of *community time* with *commute time* (Oldenburg, 2001, 4). Also, Oldenburg introduced the concept of the *third place* as "a setting beyond home and work in which people relax in good company and do so on a regular basis" (Oldenburg, 2001, 2). Third place, therefore, embodies the area between an individual's privacy and public spaces. The division of space into what Oldenburg termed "unifunctional zones", residential areas on the one hand and spaces dedicated to profit generation and consumerism on the other, led to the gradual erosion of communities in a purely social sense. A great deal of Mala Zora's journey to the future takes place in the forest, which I regard as a third space, a location far off from both the traditional school setting and home. Moreover, the whole point of the advanced approach to education is that it allows children to explore the third space safely through free movement and unconstrained play in nature. One of the scenes of unrestricted play in the novel vividly illustrates this claim. Zora stops the car in the woods, and the children begin to play with lambs:

> *We got out of the car. The lambs started jumping around us. A kid goat hit me on the head and knocked me over into the grass. I pouted and wanted to cry, but the others laughed so much that, instead of crying, I also started to laugh. At that moment, an adult female comrade came by and shouted at the naughty four-legged rascals: "These little devils! They think this is a gymnastics class, and they want to compete with you and roll in the grass with you." We went on into the woods together with the lambs and kid goats. We did not walk normally but ran and jumped like lambs. It wasn't really clear who was jumping more and rolling more in the grass – us or the little lambs; everything was completely mixed up*. (Little Zora, 2024, 155)

It is no coincidence that Mala Zora learns one of the formative lessons in the woods. Here, two points need to be highlighted. First, Zora's ability to control herself and not burst into tears is an outcome of social collaboration. As relatively new findings in developmental psychology suggest, all higher mental functions are products of social cooperation (Berk, 1994, 32). Further, engaging in collective fervour promotes joy. Also, it is worth noting that this act of individual emotional maturation could be regarded as a rite of passage in which Zora acquires the core values of the new community – joyfulness, deep connection to all living creatures, spontaneity, and attunement. This ritualistic aspect allows us to interpret the novel's third space as a liminal space. In anthropological research, liminality is understood as a phase in which neophytes "submit to an authority that is nothing less than the total community" (Turner, 1969, 364). In this process, a neophyte experiences symbolic rebirth, now as a member of the community, because the community is "the repository of the whole gamut of culture's value norms, attitudes, sentiments" (Turner, 1969, 364). The result of the process is what anthropologist and ethnographer Edith Turner termed *communitas*, the sense of liberating interconnectedness whose essential component is also joy in the immediacy of the moment (Turner, 2012, 12). It is obvious how all of the above applies to the scene of erratic play with lambs and Zora's experience. Play thus emerges as the most effective way for a child to encounter communitas. Research by Jean Piaget (2001), perhaps the most widely known psychologist of child development, emphasised the importance of play for the development of complex cognitive functions. However, in the 1990s, Western psychology discovered the previously unknown (in the West) theories of the Soviet scholar Lev Vygotsky (1896–1934). His vital contribution was demonstrating that play, especially forms that require children to costume themselves or assume specific roles, is crucial to learning emotional self-regulation and social cooperation (Berk, 1994, 38). Roger Caillois' cultural theory corresponds with Vygotsky's insights. Drawing on the cultural-historical method of the Dutch historian Johan Huizinga, Caillois (*1958*) shows that all forms of play, not only those based on assuming roles, enable the child to experience *communitas* and to exist as an active and joyful member of the community (Kajoa, 1965, 90). The dizziness experienced by Zora and her companions in their play with goats and sheep is referred

to in Roger Caillois's terminology as *ilinx*, a state of disorientation. Caillois's theory of play is based on the assumption that the principles of games correspond to primordial human needs, and he classifies the games accordingly. These include competition (*agon*), the pursuit of chance (*alea*), mimicry (*mimicry*), and the need for the loss of control, which is realised through *ilinx*. Caillois (*1965*, 88) argues that precisely because play responds to primordial impulses of the human being, these impulses can be satisfied only under ideal conditions, which is to say conditions of limited time and space (*Caillois, 1965, 88*). In other words, over the course of the play, the third space takes shape as a liminal space. Without clearly established boundaries between mundane life and the life enacted in play, play itself loses its meaning. Vygotsky arrives at a similar insight, but from the perspective of the role of play in a child's cognitive development. He argues that although a child experiences a desire to play, they must postpone immediate gratification of that desire for play to be possible at all. On the cognitive level as well, play is inseparably linked to liminality. It corresponds to the psychological function known as the *zone of proximal development*, that is, a zone of discomfort in which the child is enabled to behave 'as if' they were more mature than they actually are. Through such behaviour, the child becomes so (Berk, 1994, 36). As an imagined situation, play, according to Vygotsky, is also always a negotiation of the rules (Vigotski, 2008, 107). Thus, in the play, the child comes to understand and embrace the mechanisms of self-regulation.

For both Caillois (1965) and Vygotsky (2004), play represents a creative principle through which children come to understand and experience freedom. Caillois (1965) places particular emphasis on the fact that play must be free to preserve one of its vital properties – uncertainty. In the Romance languages, the very word *future* carries a connotation of uncertainty and unknowingness, of that which is yet to come. In illustrating how the child's brain functions, Vygotsky explicitly links creativity with the notion of humans as beings capable of dealing with the future as the unpredictable:

> *If human activity were limited to the reproduction of the old, then the human being would be a creature oriented only to the past* […] *A child's play very often is just an echo of what he saw and heard adults do; nevertheless, these elements of his previous experience are never merely reproduced in play in exactly the same way they occurred in reality. A child's play is not simply a reproduction of what he has experienced, but a creative reworking of the impressions he has acquired.* (Vygotsky, 2004, 9–11)

It is precisely this human capacity to recreate and reorganise elements that lies at the heart of proto-ecological utopias. In Morris' novel, the people of the future have chosen to halt technological development at a certain level to allow other aspects of the economy, culture, and society to thrive at the expense of technology. The social utopia envisioned in Mala Zora's dream clearly continues the trajectory initiated by William Morris (1834–1896) and Victorian socialism. In his other writings, Morris points out that machines can perform certain tasks that are done manually, but also vice versa. By underscoring the bidirectional relationship between manual and automated labour, he shows that his critique of technology, or, in his own terms, of "machinery", is not a mere disdain for innovation and mechanisation. This critique is grounded in a profound reflection on technology's purpose and overall influence on culture and society. Or, as he puts it bluntly, the goal is for humans to master the machine, rather than the other way around (Morris, 2019, 105). At the same time, Mala Zora's oneiric adventure also unintentionally addresses its own future. Its capacity to conceive the quality of human experience as inseparable from comprehensive social progress, reflected primarily in a constructive rather than destructive attitude toward the biosphere and life in general, aligns it with breakthroughs in ecological theory during the 1970s. It would not be an exaggeration to say that Vladisavljević's short novel, as well as the proto-environmentalist thinking of Victorian socialism, had no genuine intellectual allies on the left before new social and environmental movements emerged in the 1970s. Socialist imagery of the late nineteenth and early twentieth centuries was saturated with symbols articulating workers' agency and authority within industrial systems. However, Morris' and Vladisavljević' visions stand out from the tropes of the struggle for socialism and traditional social-democratic activism in that they do not picture socialism as an end in itself or as a transitional phase toward a communist society, but rather as a social framework that favours more sophisticated and noble aspects of human behaviour. In their views, socialism functions as a playground for the future. In his book *Envisioning Real Utopias,* Marxist sociologist Erik Olin Wright (2011) thoroughly theorised the principles by which the vision of socialism as a playground of collective liberty can be entrenched. First, socialism does not rest on irrational faith in the nobility of the human spirit. Rather, it fosters hope in democracy as a process. More precisely, it is a belief that democratic decision-making empowers more civilised impulses of human nature – solidarity, compassion, and respect for people by virtue of their shared humanity. The second principle concerns curiosity and the capacity for exploration. Socialism is understood as a collective experimental undertaking

aimed at repeatedly testing the limits of democratic processes. The desired outcome would be the creation of institutions that expand those very limits (Wright, 2011, 293–296). The concept of the institution serves as a link between the keywords of this research: third space, the theories of play developed by Lev Vygotsky (2004) and Roger Caillois (1958), and the proto-ecological imagination in the novel *A Walk Through the Future*. In this novel, third space and play are understood precisely as social institutions whose aim is to expand the boundaries of what is possible and desirable within the educational system. Moreover, among the many theories of play, I draw specifically on Vygotsky and Caillois because each of them, from their respective perspectives – Vygotsky from developmental psychology and Caillois from aesthetic and cultural theory – conceptualises play as a social and cultural institution. The institutionalisation of play in the novel *A Walk Through the Future* allows children to make mistakes or bend the rules without being punished. This happens when other children share with Mala Zora how they were granted the freedom to go by car without adults' supervision. During the meeting where the adults were supposed to vote on whether teachers should accompany children during outdoor lessons, the children organised to influence the outcome. The boys kept making jokes, distracting the adult comrades so much that many didn't even hear the voting question. Meanwhile, the girls lifted the arms of their large dolls, making it look as if far more 'hands' were raised. Because of this tactic, the children won the vote.

When Mala Zora calls it fraud, the children explain that such a word no longer exists in their society; instead, it was perceived and rewarded as children's resourcefulness. The children even wrote about this event in their magazine *Dete u prirodi* [*A Child in Nature*], and the adults rewarded them for their cunningness. As a result, the comrades decided that factories should start producing small cars for children. The same educational spirit connects the institutionalisation of play and the unhindered exploration of nature as the two pillars of the first socialist utopia for children in Serbian literature.

LOOKING BACKWARD AND FORWARD: VLADISAVLJEVIĆ'S EARLY ECOLOGICAL UTOPIA IN THE SPOTLIGHT OF 1970S ECOLOGICAL THEORY

Before exploring the link between environmentalist theories and *A Walk Through the Future's* imagery, I mapped out the key elements of proto-environmentalist consciousness in this novel. Resistance to reconciliation with hyper-mechanised and hyper-industrialised society is articulated through the protection of the third space as a zone of playfulness. In the socialist utopia of Dragutin Vladisavljević, values and norms are organically acquired through institutionalised play. Biljana Andonovska and Tijana Tropin summarise the gist of Mala Zora's journey as follows: "It is a time of realised communism, imagined as a children's paradise on earth, founded on a balance between advanced, functional technological progress and a return to nature and spontaneity" (Andonovska & Tropin, 2022, 160). This article further develops arguments that Andonovska (2018) had offered in the introductory article that accompanied the first reprint of *A Walk Through the Future* in *Emitor,* a periodical dedicated to science-fiction literature in the year 2018. It is precisely this respectful relationship with nature that allows us to read *A Walk Through the Future* as an ecological utopia as well. The subversion of capitalist logic in this novel emerges as a crucial principle of upbringing. Whereas the capitalist system of production destroys natural resources and thus the possibility of unmediated contact with nature, degrading and reducing nature into a means for industrial and technological development that generates profit, the workers' society in Mala Zora's dream regards technology as a mere instrument for technical improvement. This futuristic society highly esteems and nurtures the organic unity of the living and the non-living, the human and the non-human, as an end in itself. This is particularly evident in two instances. Firstly, in the title of the aforementioned children's magazine *Dete u prirodi* [*A Child in Nature*]. Moreover, children's right to organise in ways that imitate political organising within working-class institutions, such as unions, goes hand in hand with 'social upbringing', which shocked Mala Zora most. As one of the comrades she met in a new environment explains:

> *We are not brought up by special educators, nor are we taught about morals in classroom lessons by teachers, as they used to be called in the old times, a hundred years ago, before workers' order existed. We are raised by lambs, goats, birds, bees – all of Nature. Upbringing as it is today was once only dreamed of in the old days by a few children's friends, such as Jean Jacques Rousseau and Pestalozzi, but it really only happens today when comrades who are mothers decide for themselves how to bring up their own children.* (Little Zora, 2024, 169)

The episodic structure of this short novel allows readers to grasp crucial didactic and ideological points quickly – Mala Zora wakes up to discover a whole new world, symbolically represented by the school of inverted norms. It is self-evident that the school functions as a site of representation, since it is

a place where people learn to act in a socially acceptable manner. The narrator's positioning highlights a stark contrast between the mortifying past, which is indeed Zora's everyday life, and the more joyful childhood of the kids she meets in the future. Unlike the school of the past, this schooling system takes a more holistic approach to upbringing and an utmost willingness to examine and recognise children's needs, rather than a strict set of rules to discipline children into submission. The fundamental difference between the capitalist present and the socialist future lies in the relationship to corporal punishment and to space. While the capitalist world relies on corporal discipline, physical hierarchies, and restrictions, the new working-class society embraces free movement, abolishing hierarchies between women and men, teachers and pupils, and humans and the rest of the biosphere.

However, the situation is not entirely black and white. Vladisavljević's utopia allows free exploration as a key learning method. This utopian society nonetheless includes some mechanisms of surveillance and control. Adult comrades monitor children via radio stations even when they are out of sight, while children's vehicles operate along predetermined routes. This remains a major contradiction in the novel, which, however, does not mention any similar mechanism that would apply to the adults as well. Here, it is worth noting that at the end of the story, we learn that the police do not allow the workers' procession to pass through the city; instead, the participants are forced to take a side road. This scene shows that social hierarchy and repression directly determine who has access to cultural and natural resources. Moreover, Mala Zora is utterly surprised by the spontaneity and freedom of the new school, which becomes painfully evident when contrasted with the spaces and places to which she and her real-life peers were confined. As an illustration, during what turns out to be a history class in the future, Zora and her new classmates watch moving pictures about elementary schools at the beginning of the twentieth century, when one of the slides shows the following description: "A little further on you can see a shack with a sign 'Primary School.' The tavern building is new and much nicer than the school" (Little Zora, 2024, 164).

As a contrast to the devastated educational infrastructure, surrounded by an inn and drunken people, the school of the future appears as a harmonious unity of nature and civilisation conceptualised without mutually exclusive binarism. Vladisavljević's *A Walk Through the Future* unmistakably inherits a Morrisian contempt for the technocratic, scientistic style of management, later termed Taylorism in labour theory (Braverman, 1974), and explicitly articulates the notion of the human being as an integral part of the biosphere rather than its superior or, let alone, master. In this regard, *A Walk Through the Future* persistently stages what a process of unlearning *industrial mythology* would look like at the level of everyday organisation and experience. When such a need arises, the educators allow the children to change their schedule and conduct a hygiene lesson instead of maths. This is how one of the 'comrade educators' addresses the pupils:

> *Children, instead of a calculation class we have just had a class about cleanliness and health or, as it is called, hygiene. We held this class in this great hall, with one side open and looking out into the woods. As we talked about how to take care of our health, the birds chirped and flew from blossoming branch to blossoming branch which bend down as though they want to enter the hall. In the woods, sheep and goats and little lambs and kid goats are jumping cheerfully across the grass and through the bushes, and their bells seem to be calling you there as well.* (Little Zora, 2024, 163)

The goal of this narrative sequence is to demonstrate what school education would look like if liberated from serving industry and social hierarchies as its primary purpose.[2] When Zora is confused by the absence of benches in the classroom, her companion explains:

> *The adult comrade who teaches us told us that in the old days there used to be, but they noticed that when children sat on such benches, they only looked attentive but didn't think about what they were being told. They sat numbly on the benches, did not move and thought little, and did not think about what they were being taught, but only listened and memorised things by heart like parrots, without understanding anything. That is why we decided to throw the benches out of the school classroom and now, as you can see, some children are standing, some are sitting on chairs, some on the floor, in whichever group suits them best.* (Little Zora, 2024, 157)

2 Vladisavljević's utopia corresponds not only with ecological but with pedagogical theories of the 1970s as well. This parallel further evokes Paulo Freire's *Pedagogy of the Oppressed*, first published in 1968, in which the educational process plays a pivotal role in mediating between the dependent position of the oppressed in the present and their liberation in the future (Freire, 1990). Stanley Aronowitz explains Freire's position as follows: "The oppressed are situated within an economic and social structure and tied to it not only by their labour but also by the conditions of their psychological being. The task of his pedagogy is to encourage the emergence of a specific kind of discourse that presupposes a project for the formation of subjectivities that is increasingly separate from that of structure" (Aronowitz, 2015, 121).

Obviously, liberation starts with treating human bodies with dignity and respect. However, such an educational approach would be incompatible with industrial settings that require future workers to adjust their biorhythms to the needs of capital. I borrowed the term industrial mythology from Rudi Supek (1989), a Yugoslav social scientist and the only person from Yugoslavia who attended the above-mentioned 1972 United Nations Conference on the Human Environment. At that time, climate change, overpopulation, pollution, and CO_2 emissions were officially identified as global challenges with the potential to annihilate humankind and civilisation. One year later – and three years after L. R. Brown published *World Without Borders* – Supek released his study *Ova jedina zemlja* [*This Only Earth*] in 1973. Its subtitle, "Are we heading toward catastrophe or toward a Third Revolution?", clearly reflects the author's position, which implies that, following the two industrial revolutions, a further ecological revolution is required to enable the genuine and sustainable development of society. After two industrial revolutions, which enabled the rapid growth of the world's population, it became necessary to unlearn the fascination with industrial development (and the profits it generates), which persisted even in the left-wing circles. Supek explicitly challenged a frequent socialist and trade-unionist 'industry creates workplaces' argument as a fundamental inability to think beyond the capitalist framework in the long run. He openly poses the question, "What use is life to me if I were to live on the 536th floor of a skyscraper, if I were to breathe oxygen and drink water from some devices located on lower or higher floors of this enormous building?" (Supek, 1989, 23). This illustration clearly corresponds to his theoretical argument as well: two industrial revolutions unfolded under the aegis of growth for the sake of growth and profit. The third, essentially an ecological revolution, would have to impose limits on this expansion. Supek also firmly believes that "the ruthless exploitation of nature is merely a consequence of the ruthless exploitation of humans" (Supek, 1989, 45).

It appears that Vladisavljević's literary utopia gave imaginative and poetic form to this insight half a century earlier. Although capitalism is driven by an obsession with perpetual progress, it simultaneously destroys the environment, thereby intensifying society's temporal responsibility toward future generations in a profoundly negative way. The present generation cannot, even in theory, encounter those whose lives will be significantly worsened by escalating environmental degradation. It was precisely the ecological theories of the 1970s that (re)introduced awareness of both the social, spatial, and temporal dimensions of the ecological crisis. Or, in Andre Gorz's words, "the socialism of economic growth presents a distorted image not of our future, but of our past" (Gorz, 1982, 35). This notion prompts us to reread the history of emancipation in a way that includes those voices that were more farsighted than the mainstream left. *A Walk Through the Future* is, thus, a fundamental part of that legacy, which, unfortunately, remained invisible and under-researched for a long time.

CONCLUSION

This essay begins with a subtle polemic against posthumanist theories, because they diminish the significance of the human subject in the pursuit of environmental and climate justice. It concludes by linking early socialist utopias with ecological theories of the 1970s. Third space, liminality, and the theories of play developed by Vygotsky and Caillois enable us to access deeper symbolic layers of the short novel *A Walk Through the Future*. When read together, these theories open new possibilities for interpreting Vladisavljević's vision of an educational system that fosters solidarity and equality among people. Without third space and play as settings and practices through which humans express their innate resourcefulness, desire for freedom and unpredictability, it does not seem achievable to liberate oneself from a capitalist worldview that privileges linear growth, efficiency, and the constant disciplining of bodies in space. Without such a transformation, no ecological policy could be effective in the long run. Third space and play, as understood by the authors discussed here, guide us toward those aspects of humanity that strive for harmony with nature rather than domination over it. Such an interpretation points to the conclusion that a return to the human(ist) subject, rather than a bold rejection of its significance, is the path toward new views of environmental and social justice as inseparable from each other. This also explains why, unlike ecomodernist projections, texts such as Vladisavljević's can offer us some hope. Whereas posthumanist and ecomodernist theories more or less implicitly antagonise the individual subject and its environment, Vladisavljević's novel, like the ecological theories of the 1970s, demonstrates how the process of reshaping the individual subject can be dialectical. In this way, it provides material for reflecting on the constitution of a radically democratic collective subject, one that would not rely on the negation of history, as critiques of the Anthropocene often do, but rather on the incorporation and reinterpretation of all previous emancipatory experiences and visions.

RAZISKOVANJE TRETJEGA PROSTORA: INTERPRETACIJA IGRE V OTROŠKEM ROMANU *SPREHOD SKOZI PRIHODNOST* SKOZI VIGOTSKEGA IN CAILLOISA

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POVZETEK

Skozi teorijo igre, kot sta jo razvijala Lev Vigotski (1896–1934) in Roger Caillois (1913–1978), avtorica v članku preučuje otroški roman Šetnja kroz budućnost (»Sprehod skozi prihodnost«) – socialistično utopijo iz obdobja 1924–1925, ki jo pripisujejo socialdemokratu, zdravniku in pedagogu delavstva Dragutinu Vladisavljeviću. Pri tem razvija tezo, da osrednjo vlogo znotraj pedagoške in protoekološke domišljije romana zavzemata igra in tretji prostor. Študija sledi pripovedi o Mali Zori, deklici, ki sanja o prihodnji delavski družbi, kjer izobraževanje ne bo potekalo v togih in discipline polnih šolskih učilnicah, ampak v skupnostnih prostorih in igrivih naravnih okoljih. Te prostore, v katerih se odvije sanjski prehod Male Zore v protikapitalistično družbo, avtorica označi za liminalne ter jih sledeč Rayu Oldenburgu (2001) preučuje kot tako imenovane tretje prostore, ki se nahajajo onkraj prostorov doma kot dela, s čimer omogočajo družbenost, svobodo in kolektivno veselje. Opirajoč se na Vigotskega, članek prikaže, kako v romanu prav igra spodbuja čustveno samoregulacijo, ustvarjalnost in družbeno sodelovanje. S Cailloisovo taksonomijo igre, zlasti z ilinx kot užitkom dezorientacije, članek osvetli v romanu uprizorjene ekstatične, skupnostne igre z živalmi v naravi. Skozi dialog z omenjenimi teorijami prikaže vlogo in razumevanje igre v »Sprehodu skozi prihodnost« kot družbeno institucijo, ki goji solidarnost, spontanost in prakso deliberativne demokracije. V navezavi na ekološki socializem Williama Morrisa (1834–1896) in socialistično jugoslovansko ekološko teorijo 1970-ih let, kakršno je razvijal predvsem Rudi Supek (1989), ki je poudarjal omejitev rasti, kolektivno odgovornost ter enotnost med ljudmi in preostalo biosfero, avtorica v zaključku umesti roman v razvoj okoljevarstvenega mišljenja.

Ključne besede: teorija igre, tretji prostor, liminalnost, Lev Vigotski, Roger Caillois, utopična literatura, otroška literatura, ekološke podobe

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URBAN SPACE AND THIRD PLACES IN DRAGAN LUKIĆ'S POETRY AND PROSE

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ABSTRACT

This paper considers the urban space as depicted in Dragan Lukić's poetry and prose, with a particular focus on third places for children. Lukić introduced a new sensibility into Yugoslav children's poetry after World War II, building on the avant-garde heritage of the 1930s and creating accessible texts for contemporary children. His poetry and prose integrated the new loci of urban third places, construing them as zones for play and children's autonomy, while highlighting the importance of the community for children's development.

Keywords: Dragan Lukić, Serbian children's literature, Yugoslav children's literature, third places for children, urban space

SPAZIO URBANO E TERZI LUOGHI NELLA POESIA E NELLA PROSA DI DRAGAN LUKIĆ

SINTESI

Questo articolo prende in esame lo spazio urbano così come rappresentato nella poesia e nella prosa di Dragan Lukić, con particolare attenzione ai terzi luoghi per l'infanzia. Lukić introdusse una nuova sensibilità nella poesia per l'infanzia jugoslava dopo la Seconda Guerra Mondiale, sviluppando l'eredità delle avanguardie degli anni '30 e creando testi accessibili ai bambini del suo tempo. Nelle sue opere poetiche e narrative egli integrò i nuovi luoghi urbani riconducibili ai terzi luoghi, configurandoli come spazi di gioco e di autonomia infantile, sottolineando al contempo l'importanza della comunità per lo sviluppo dei bambini.

Parole chiave: Dragan Lukić, letteratura per l'infanzia serba, letteratura per l'infanzia jugoslava, terzi luoghi per bambini, spazio urbano

INTRODUCTION

A chair behind a closed door – war in the street.
A chair in front of an open door – this house is open.
Open windows and doors – no boundary between the house and the world.[1]
Pogađalica [Guessing-game] (1973)[2]

The children's poetry of Dragan Lukić (1928–2006) has rarely been studied in depth, with infrequent exceptions such as Radomir Životić's (2018)[3] monograph, and we may safely say that his prose opus has not been closely studied at all. Broadly speaking, his short stories and novels have been treated as secondary to his voluminous corpus of poetry. Until relatively recently, the criticism of his poetry was also largely confined to general judgments, with occasional detailed analyses (cf. Bojanić Ćirković, 2025; Panić Maraš, 2025).

On the other hand, if we look for an author who represents the era of Yugoslav 'reconstruction and construction', we can hardly find a more typical children's poet than Lukić. Almost from the very beginning, Lukić is a poet of modern urban spaces. It is no coincidence that one of the most frequently republished selections of his poetry is called *Nebom grada* [Across the City Sky][4] (1978).

This paper will focus on the urban child's third places as described in Dragan Lukić's poetry and prose, specifically the forms of third places detectable in narratives set in Belgrade, and covering the turbulent historical period from the late 1930s to the 1960s, while Belgrade transitioned from the capital of the Kingdom of Yugoslavia to the capital of FNRY and later SFRY.[5] In order to do that, we will have to rely on a hybrid methodological framework that includes both the literary-historical method and the concept of third places as developed by the urban sociologist Ray Oldenburg (1999), as well as historical and architectural-historical studies dealing with Yugoslav cultural history and the architecture of Belgrade specifically. We posit that Lukić's opus presents a large body of texts featuring third places for children, as defined in the seminal sociological study *The Great Good Place*: "the core settings of informal public life […] a generic designation for a great variety of public places that host the regular, voluntary, informal, and happily anticipated gatherings of individuals beyond the realms of home and work" (Oldenburg, 1999, 16). Oldenburg also describes third places as "inclusively sociable, offering both the basis of community and the celebration of it" (Oldenburg, 1999, 14). When juxtaposing this with Jenny Bavidge's (2006, 328) conclusion that "children's literature['s] […] real interest for children's geographers must lie in what it tells us about the discourses, genres and projections by which the city is imagined for children", it seems clear that an examination of Lukić's texts will show us both how the broader socialist context determined the idealized image of the city and child's life in Lukić's work, and the clash between that image and the reality, which also emerged in his poems and short stories. An overview of Lukić's work should offer an exhaustive list of third places, where the urbanists' plans intersect with the *Lebenswelt* (lifeworld, the shared experience and cultural background) of city children.

HISTORICAL CONTEXT: 'RENOVATION AND CONSTRUCTION' – THE EMERGENCE OF MODERN CITYSCAPES AFTER WORLD WAR II

Lukić began writing after the Second World War, during a time when Yugoslavia, destroyed by wartime bombings, was being rebuilt. Radical social shifts were accompanied by major urban changes; the migration of the rural population to the urban environment increased the urgent need for new housing, organized in accordance with the demands of modern mid-century urban life. As Ivana Dobrivojević Tomić (2012, 121) has stated within her broader research of the rural and urban living in post-war Serbia, the living conditions were very hard for many urban dwellers, leading to a state of "constant housing misery".

Contemporary architects turned to a style nowadays known as Socialist Modernism (and its evolvement Socialist Brutalism), in a valiant attempt to create economical modern housing and living space for the citizens of the new society. Many authors have written about the architectural characteristics of that period – large residential buildings for numerous households and the abandonment of older small-scale housing models (for an in-depth discussion cf. Stierli & Kulić, 2018). Together with the mass migration from rural to urban environments such as Novi Beograd (New Belgrade), a typical example of a Belgrade district built entirely in the style of Socialist Brutalism,

1 "Stolica iza zatvorenih vrata – rat na ulici. / Stolica ispred otvorenih vrata – kuća se sasvim otvorila. / Otvoreni prozori i vrata – granice između kuće i sveta nema" (Lukić, 2024, 294).

2 It is important to note that all subsequent dates of first publication refer to first publication as part of a poetry or short story collection. Many of these works were first published earlier, in children's periodicals, but the lack of a complete bibliography has rendered it extremely difficult to establish the dates of first publication proper.

3 It should be noted that Životić's monograph on Lukić's poetry was first published in 1975, as a reworked version of his master's thesis. It is both a testimony to Lukić's importance and the sole book-length work dedicated to his opus.

4 Unless otherwise noted, all translations of titles and quotes are mine.

5 FNRY – Federal People's Republic of Yugoslavia (1945–1963), and SFRY – Socialist Federal Republic of Yugoslavia (1963–1991).

this often led to a deep disorientation of new residents and alienation from their new surroundings (for a short overview of contemporary criticisms regarding life in the apartment towers of Novi Beograd cf. Le Normand, 2008, 147–150). On the other hand, people adapted, developing coping strategies, re-coding and appropriating segments of their new environment in order to satisfy their social and emotional needs more fully. Among the many changes of this period, the one we are most interested in this context is the gradual transition from one model of the third place to another: in Belgrade, the collective life and children's freedom within the loose neighbourhood communities, although nearly infinite from today's point of view, were actually shifting from the framework of one urban model to another. As we shall see, Lukić's protagonists continuously negotiate the use of the new third places and new forms of outdoor activities.

EMERGENCE OF A NEW YUGOSLAV CHILDREN'S LITERATURE

Cultural production transformed along with the socio-economical changes (that included, as we shall see, significant changes in urban planning and housing). As Jovan Ljuštanović (2009) demonstrated in his influential study on the development of modern children's poetry in Serbia, *Brisanje lava* [Erasing the Lion], after the initial wave of Socialist Realism, Serbian children's authors embraced the legacy of Surrealism, creating a modern, playful and less ideologically charged form of children's poetry. To varying degrees, the same process was at work in all parts of Yugoslavia. In Serbian poetry for children, however, the informal but undisputed programmatic and poetic leader of the new movement was Dušan Radović (1922–1984), who wrote for children and adults alike, edited various magazines (*Pioniri* 1951–1952, *Poletarac* 1973–1975), and worked as an editor of children's programmes at the state-owned broadcaster Radio Beograd and later Radio-Televizija Beograd. Dragan Lukić soon became one of Radović's most reliable and creative younger followers and associates.

Born in Belgrade in 1928, he graduated at the University of Belgrade in 1954 and at first worked as a professor of Serbian language and literature at the Belgrade Pedagogical School. Lukić's first poems appeared in high-school periodicals in the late 1940s, and from the early 1950s onwards, he published stories and poems in various children's periodicals and joint collections. Over that decade, he established himself as one of the leading Yugoslav and Serbian children's poets, writing across multiple media and genres (radio, theatre, television). In later years, he turned to writing autobiographical and autofictional narratives. He lived and worked in Belgrade until his death in 2006.

Paradoxically, literary theorists and historians were sometimes dismissive of Lukić because of the great popularity of his poetry, its accessibility, and the fact that Yugoslav children of the socialist era grew up with Lukić's poems and stories not only as part of the compulsory school reading, but also as part of popular culture (children's music, TV shows, etc.). What also worked against him was his productivity – Lukić wrote on demand, quickly and assiduously, even on a day-to-day basis, for newspapers, radio and television. Nevertheless, his effort to address his contemporary children audience directly and to establish a good rapport with them resulted in a lyrical opus that offers a carefully observed, sensitive depiction of mid-twentieth century childhood that is both idyllic and urban.

BELGRADE CHILDHOOD AROUND 1940

The vision of the city that Lukić provides in his poetry and prose is significant today for striking a precarious balance between realism and socialist idyll, depicting both home and school as idealized forms of first and second place. With rare exceptions, Lukić does not generally problematize the world in which his heroes live, work, and study (Ljuštanović, 2009, 173). Lukić's representation of the third places, however, i.e. the spaces where children play, socialize, and spend their free time, still contains a measure of realism and authenticity, and he often describes these spaces as clearly demarcated and recognizable, tied to a specific socio-historical context. Lukić's protagonists play outside the home – but over time, the nature of the home and its surroundings shifts implicitly. We can distinguish two very different types of urban buildings appearing in the background of Lukić's texts: the pre-war tenements and their post-war remnants, and in sharp contrast with them, the new high-rise buildings.

The first type is most typically embodied by the form of housing known as *partajas* or *avlijske zgrade* (courtyard buildings). In her authoritative study on the housing of the poor in interwar Belgrade, Zlata Vuksanović-Macura (2018, 186) describes them in detail, as "elongated courtyards of a rectangular or trapezoidal shape, 10–12 meters wide and about 25–45 meters deep" with apartments (usually low-rise buildings) lined up along the sides, with a common water fountain in the middle and common toilets and sheds at the bottom of the yard; all apartments had entrances from the courtyard. The *partajas* were intended for poor working families or individuals, and this was reflected in their size (one or two rooms) and an average ceiling height of 1,5 to 2 metres (Vuksanović-Macura, 2018, 186–187). Such accommodations were usually situated on the

city outskirts, but the rapid development of Belgrade often turned them into inner-city slums.

Naturally, lacking privacy and personal space, the tenants of a single *partaja* were by necessity quite familiar with each other, and in good weather many activities such as food preparation, socialising etc. were performed in the yard. This included, obviously, children's games. The children, however, were usually not strictly supervised, and the play spilled over and outside the courtyards: into the liminal space of the streets and parks, and the interstitial spaces or "urban voids" left between urbanized and structured parts of the city. As Sousa Matos (2014, 66) notes discussing the potential uses of interstitial spaces, "this is where their children go in search of free spaces for socialising".

In Lukić's poems and stories, the nature of this life before and immediately after the war is clearly reflected: mothers send children outside to fetch water in *Joca je oprao beton* [Joca washed the concrete] (1965) (Lukić, 2024, 349); neighbourhood children join a single child's game instantly in *Ivin voz* [Iva's Train] (1963) (Lukić, 2024, 278); and children often play with damaged or improvised toys that signal poverty, like headless dolls in *Lutka bez glave* [Doll with No Head] (1965) (Lukić, 2024, 340), or a football made of rags in *Krpenjača* [Rag Ball] (1965) (Lukić, 2024, 352).[6]

But for an extended analysis, we can turn to a series of texts that are often omitted from consideration[7] when discussing Lukić's opus: a series of autofictional children's novels on growing up in Belgrade during the 1940s, published between 1972 and 1985, and written from the viewpoint of a slightly fictionalized Lukić himself. Our discussion of third places for children and young adults will be limited to the first three titles in the sequence. *Tri gusketara* [The Three Gooseketeers] (1977), covers roughly 1937 and 1938; *Bomba u beloj kafi* [A Bombshell in the Morning Coffee] (1972), describes the World War II period between the April war and the liberation of Belgrade (1941–1944); and *Cvetkovci* [The Boys of Cvetko's Marketplace] (1981), focuses on the immediate post-liberation period (1944–1945). In his later years, Lukić himself stated that his aim was to create a faithful depiction of the place and time:

> *In these five books, I have provided an authentic geography of the eastern part of Belgrade, from the Pančevo Bridge, across Zvezdara to Autokomanda* […] *By writing down my memories of this city from 1937 to 1948, I think I have created a kind of historical archive of the capital with the names of its streets, descriptions of buildings, listing cinema repertoires and memories of a generation that practically lived in three states – the Kingdom of Yugoslavia, Nedić's state*[8] *and Socialist Yugoslavia.* (Kosanović, 1999, 8)

Tri gusketara [The Three Gooseketeers] is situated in Pašino brdo (Pasha's Hill), a neighbourhood on the outskirts of pre-war Belgrade (cf. Figure 1). That area represented a typical example of the settlements analysed by Vuksanović-Macura (2018) – small family houses, often built by the inhabitants themselves, along an unpaved street, with garden plots, chicken coops and pig pens. The residents are generally working-class – from craftsmen and factory workers to itinerant musicians and policemen. Lukić delineates the boundaries of the suburban community very clearly, centring it around the primary school named after the poet Vojislav Ilić and a large brickyard. The school is explicitly stated to be the locus of 'another life' for children, closely resembling Oldenburg's definition of second space: "The musketeers didn't just live with geese on the green meadow and they had friends beyond their street and 'enemies' beyond Mali Mokri Lug. They were pupils of the Vojislav Ilić elementary school and lived another life there" (Lukić, 1991a, 60).

The Belgrade suburb of Pašino brdo is described lovingly, with strong Arcadian overtones, and the children' protagonists (aged 9 to 10 years old) are presented as nearly completely autonomous within that sphere, with the boundaries between home and street almost non-existent. The local boys meet daily under one of the few street lamps, using its circle of light as a shared space where they can talk and read together until late into the night (Lukić, 1991a, 47). Other meeting places include an empty field between their street and their school, a typical "urban void" as described by Sousa Matos (2014), as well as various meadows and wild groves in the area where children play and daydream while taking their geese out to graze. Beyond the boundaries of Pašino brdo, the situation is different. To the south lies Trošarina, the former excise check point and the boundary of the city proper and further on the village of Mali Mokri Lug (Lukić, 1991a, 45), which the children view as a fairy-tale space where their geese might turn into princesses. The single other part of Belgrade they visit outside Pašino brdo is Topčider, a popular picnic spot for families and school trips. Although these places are within easy reach, the children see them as remote, mysterious and alluring.

6 The titles of Lukić's works are provided in original and in translation. As for the quotations from his texts, prose fragments are quoted in translations only, while excerpts from poems are provided in the original as well.

7 For a detailed analysis of the autofictional aspects of this sequence of novels cf. Tropin (2026).

8 "Nedić's state" refers to Serbia under occupation in World War II.

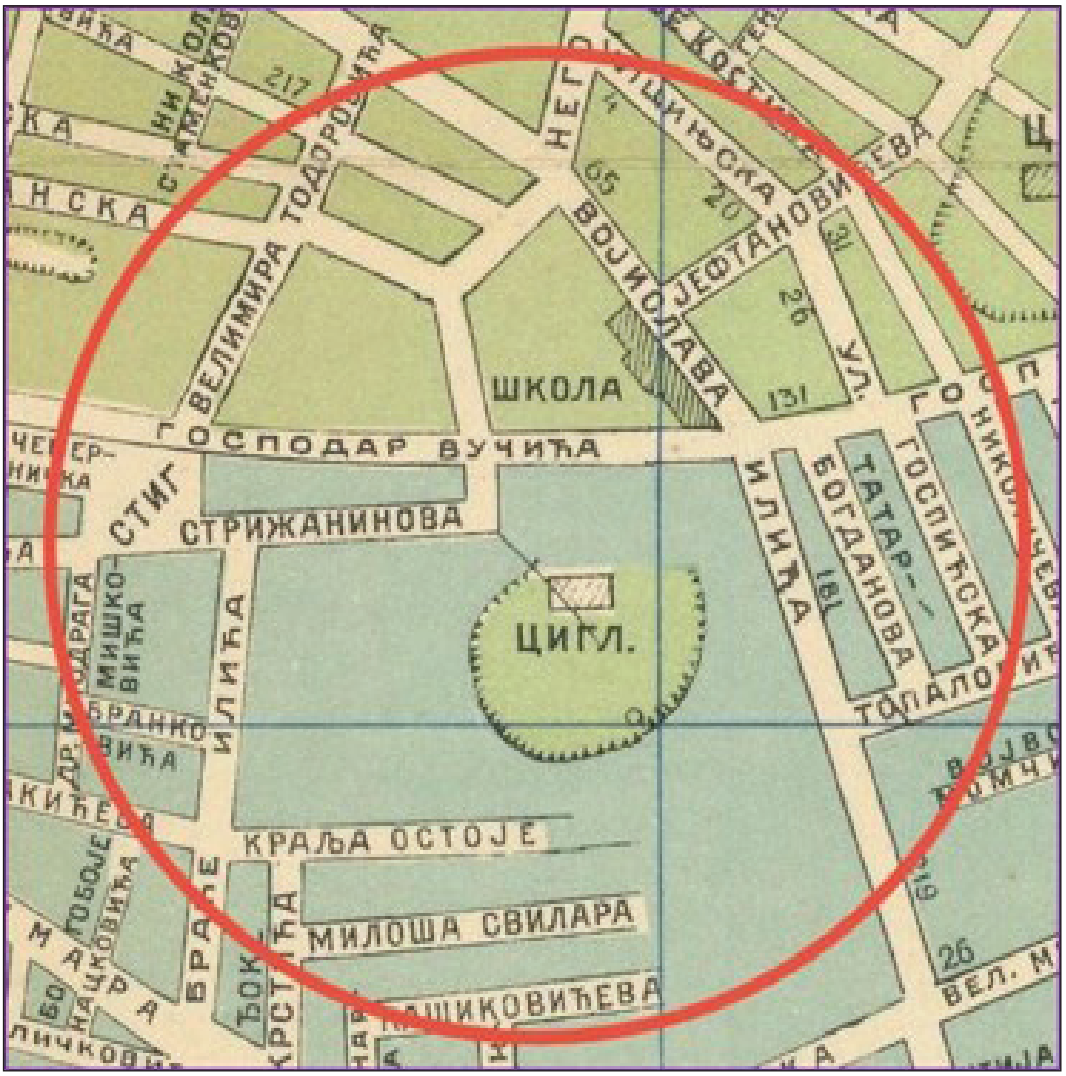


Figure 1: Map of Belgrade in 1940, detail (Source: RAREMAPS, 2026).

The second part of the sequence, *Bomba u beloj kafi* [A Bombshell in the Morning Coffee] (1972) (Lukić, 1991b), uses the same setting, but the tenor of this novel is quite different and much darker. It is also much more tightly plotted than any other of Lukić's Belgrade novels and, naturally, the shift in the protagonist's spatial experience is dramatic.

Bomba… [A Bombshell …] opens with the description of the German bombing of Belgrade in 1941. The first chapter contains an almost obsessively detailed listing of the neighbours' houses, their names and occupations, as well as their ethnicity – many of them are Romani, a fact that will later gain tragic significance. In an instant, the streets and open fields of Pašino brdo transform into places of danger, and the protagonists' family, together with their neighbours, escape to the nearest villages in a mass centrifugal exodus. Although they return home after the first few days of war and find their district unscathed by bombs, everything has changed: there are no places of safety any more and no freedom of movement. The former communal spaces are endangered or gone, as the German army is using the fields around the abandoned brickyard as training grounds and SS troops are often patrolling along the streets or raiding houses.

During the war, courtyards emerge as new, localised third places, where children can play in relative safety. "That's why parents kept their children at home, in rooms and yards. And what else would children do in their rooms and yards, when they forget about the war, but invent games?" (Lukić, 1991b, 42). These games are described in great detail: the boys replace their lost football pitch with a miniature simulation in the protagonist's yard, using buttons to represent players and a gaming die as the football (Lukić, 1991b,

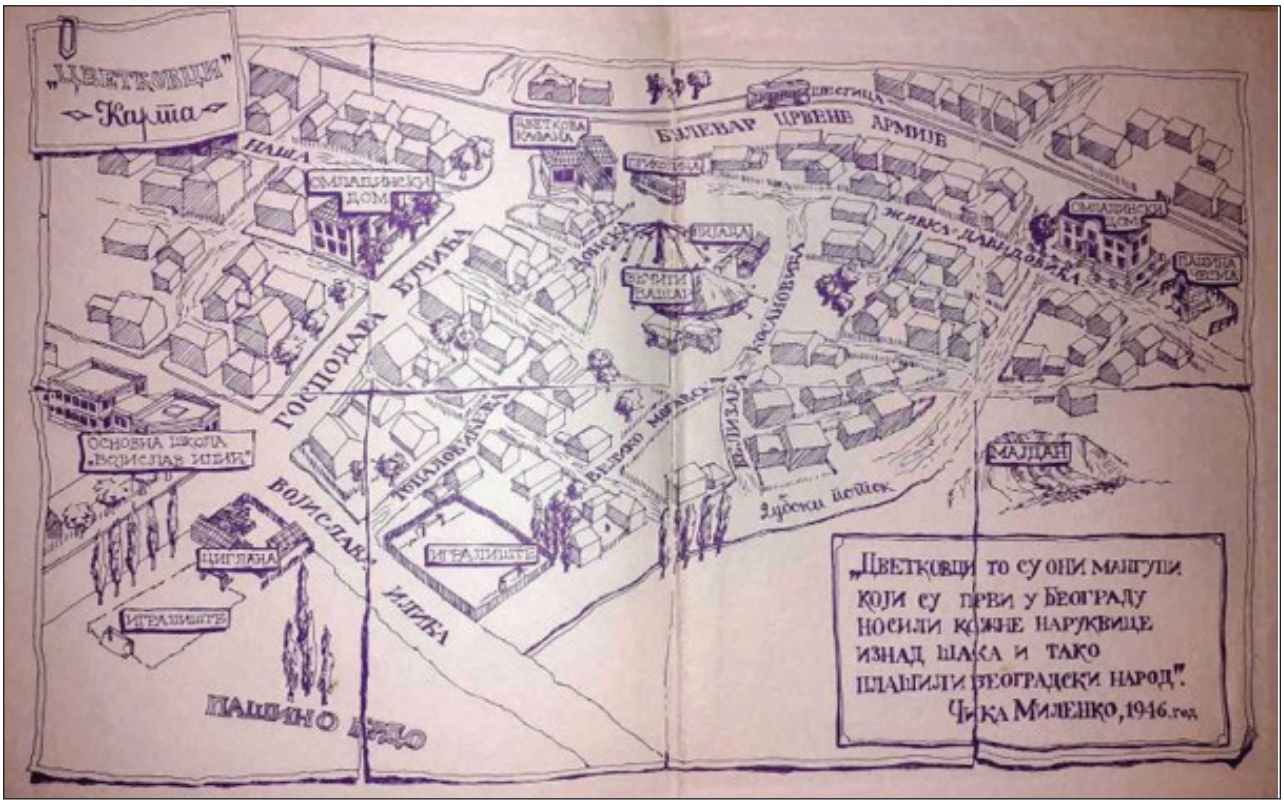


Figure 2: Frontpapers for the first edition of Cvetkovci, drawing by Rajko Kovačević, 1981 (Source: Lukić, 1981).

42–46). The construction of toy airplanes, tanks and cannons merits an even longer chapter, including a meticulous description of the procurement of materials (often by theft) and the manufacturing process (Lukić, 1991b, 59–71). The children's play and the intricacy of their games constantly intersect with the harsh reality of war – limited freedom of movement, hunger and cold – a dynamic that culminates in the boys' decision to use their toys for kindling, symbolically ending their childhood.

It is important to note that this watershed event is bookended by two episodes that describe children venturing into streets beyond their neighbourhood. The first episode narrates the rescue of two of their Romani friends from the Germans: the boys dress up as a group of *vertepaši* (a folk custom linked to Orthodox Christmas, similar to *koledari* or Christmas carolling), and escort their disguised Romani friends to another part of the town and into relative safety. The other episode (and the single collective excursion downtown described in this novel) occurs soon after the toy burning, when the boys decide to accompany the neighbourhood girls on a walk. Although set before the end of the war, the entire episode determines the tone of the next novel: the protagonists are on the cusp of adolescence, discovering both the city beyond the limits of Pašino brdo and the possibility of sentimental attachment (Lukić, 1991b, 89–94). The breaking out from the constraints of war will change both the boys and the city around them.

"GEOGRAPHY AND MAFIA" – *CVETKOVCI*

This novel is the last in the sequence set entirely in Belgrade. It is also doubtlessly the most successful in depicting the immediate post-war period, the reshaping of society in accordance with the socialist model and, at the same time, the protagonist's adolescent exploration of the changing city.

The beginning represents a narrative throwback to the period before the war, with a nostalgic description of the Lukićs' home that focuses on the 'Ottoman empire' (the affectionally nicknamed ottoman in the living room). From that safe space of childhood, the spatial focus zooms out to encompass the street where they live, then the entire Pašino brdo, and finally other parts of Belgrade. Simultaneously, the narrative switches to the time after the war.

Dragan and his brother Jovica are learning how to navigate other parts of town, establishing a rivalry with the informal street gang called *Cvetkovci* [Cvetko's boys], a pack of apprenticed

car mechanics and blacksmiths (Lukić, 1991c, 46). *Cvetkovci* rule their neighbourhood by sheer physical strength and intimidation.

The fact that the first edition includes a map of that part of Belgrade (cf. Figure 2) is very deliberate. The short chapter "Geografija i mafija" ["Geography and mafia"] includes a comprehensive description of the area, naming all the streets, listing all important landmarks – from schools to restaurants to factories – and, most importantly, it explains the gang's pride and sense of identity. Their territory has carefully and precisely defined borders, but they also appropriate the tram line Nr. 6 and any interesting locations along its route – in fact, any and all third places open to adolescents in the late 1940s. "The Cvetko's boys claimed the right to Cvetko's market, to the fairground, to the tram No. 6, to all dance halls, to all cinemas, to all football fields, to all boxing clubs, to all Belgrade riverside beaches, to all of Belgrade. They claimed that right and fought for that right" (Lukić, 1991c, 46).

Before long, a larger conflict emerges between the gang on one side and the apprentice tram drivers and the SKOJ[9] members on the other. Lukić sketches the struggle between the opposite groups while minimizing its ideological background and softening the potentially troubling aspects of gang life. In *Cvetkovci*, and even more in the two final Belgrade novels, Lukić aims to present a detailed and largely verifiable, yet idealised and nostalgic picture of a Belgrade adolescence in the late 1940s. The basic sentiment is not far from the semi-ironic formulation, "They never had it better?" selected as the title of an exhibition devoted to modernization of everyday life in Socialist Yugoslavia (Panić et al., 2014).

However, the depiction of a socialist childhood in Lukić's poetry and prose was contemporaneous to the way of life he was describing, and therefore both the imagery and the fundamental sentiment underlying his early works are quite different.

COMMUNAL LIVING IN HIGH-RISE BUILDINGS

The era of 'reconstruction and construction' also meant the emergence of the new brutalist architecture, which in some places represented the construction of entire new neighbourhoods (Novi Beograd). In his early, expressive poetry, which often experiments with novel graphic forms, Lukić shapes the image of a modern city. One of the most successful examples is the *Bajka o soliteru* [Fairy-Tale of the High-Rise] (1963), in which it anthropomorphizes the high-rise as a living, sentient, extremely tall being. We have to quote the opening in the original, in order to reproduce the characteristic graphic form:

S S
O O
L L
I I
T T
E E
R R
Kakvo čudno ime! (Lukić, 2024, 298)[10]

Other poems describing modern Belgrade range from *Šest balkona* [*Six Balconies*], 1962, (Lukić, 1979, 106) to *Dok se Beograd sprema da sanja* [As Belgrade Prepares for Sleep] (1961). *Šest balkona* present a dynamic picture of an apartment building's façade, with the titular balconies appearing as repetitions of a single image and establishing a collective identity of the building: they are likened to "six naval crow's nests" and "six pulled-out drawers", and they display "one boy each" in the morning, and grandmothers later in the day, imperceptibly linking their age with the time of day (Lukić, 1979, 106).[11] While this poem is not explicitly set in Belgrade, by contrast, *Dok se Beograd sprema da sanja* is not merely an extended fantasy of living buildings talking a walk on their night out, it is also very precise in regard to the locations, the building and even neon signs:

"Terazije street goes for a walk / dressed as a great lady / with a necklace of silver neon / and quietly, so as not to cause a stir in town, / she pins on the blue brooch of Chromos' neon sign / and puts on her shoes with concrete heels" (Lukić, 2024, 297).[12] The "blue brooch", was, in fact, a well-known feature of the Igumanov Palace, situated on Terazije Street – the first animated neon sign in Belgrade, depicting the Chromos' logo designed by Milan Vulpe in 1954.

Life in a modern, vibrant city had its drawbacks. Tenants of new buildings had to get used to a new way of life in multi-storey buildings and develop new forms of community and common life. This was especially true for children, who were now often left alone, without the loose community network

9 SKOJ or Savez komunističke omladine Jugoslavije [League of Communist Youth of Yugoslavia] was the most important youth organisation in the postwar years.

10 "High-rise / High-rise /What an odd name!"

11 "Na našoj zgradi ima / šest okačenih balkona / ko šest mornarskih korpi […] Na našoj zgradi ima šest okačenih balkona / ko šest izvučenih fioka" (Lukić, 1979, 106).

12 "Tada ulica Terazije pođe u šetnju / obučena kao velike dame / sa ogrlicom od srebrnog neona / i tiho da ne načini u gradu pometnju / zakači plavi broš hromosove reklame / i obuje cipele sa štiklom od betona" (Lukić, 2024, 297).

present in the suburbs. One of Lukić's later stories, *Devojčica na repu reda* [The Girl at the End of the Queue] (1977), concerns a five-year-old girl who leaves her solitary confinement in the high-rise family apartment and escapes to the park she can see through her window, in order to look for company. The short story subtly criticises the system in which kindergartens are inaccessible to all children, while their parents are required to work all day and claims that the modern comfort of urban living is not an adequate substitute:

> *It is not easy to live in high-rise buildings. It is neither easy nor comfortable. The rooms are freshly painted and there is always hot water in the bathroom and there are many windows in the rooms and the parquet is not very hard, and you can go out onto a small balcony. But it is not easy for the little girl Jasna, whose parents go to work and leave Jasna alone in a huge skyscraper, alone, without a brother, without a sister, without a grandmother and without a grandfather, without an aunt and without an uncle, without a housekeeper and without a neighbour... And without a dog, and without a cat.* (Lukić, 1977, np.)

The society depicted in this picture-book has moved away from the happy, close-knit, conflict-free environment Lukić portrayed in his poems of the 1950s and which Ljuštanović (2009, 174) described as "creating a new family idyll", as well as the hybrid urban-rural space of Pašino brdo in the 1930s. Lukić published two versions of the story, and in the longer 1977 version, he explicitly resolves the situation with the little girl enrolling in a nearby kindergarten. Here, the motif of the playground and park also appears as a place intended for children and clearly separated from the living space. However, the third places where children and adults meet on common ground shift from courtyards and streets to the staircases and corridors of the new apartment complexes.

PARKS AND PLAYGROUNDS

In Lukić's poetry and prose, city streets and public spaces as safe play spaces are much more common than parks and playgrounds proper. The children that Lukić depicts in his early short stories, written in the 1950s, occasionally blur the line between inside and outside, between house and street. The extremely short story *Merenje* [Weighing] (1965), is indicative in this regard. Jasna runs out of the house to weigh herself on a public scale and takes off her shoes before stepping on it, so as not to dirty it; for her, the rules of conduct are the same for the street weighing-scale and for entering someone else's living space. The city district is described in the first sentence: "On the street where multi-storey buildings are stacked like large boxes, a small scale for measuring passers-by stands on a corner" (Lukić, 2024, 337). This contrast between multi-storey buildings as "large boxes" and the "small scale" operated by an individual is not explicitly activated, but it is present as important context for the image of a child that views the street scale as intimately familiar and related to home. That experience of intimacy and connection is even more emphasized in another short story, *Jasna i professor matematike* [Jasna and the Mathematics Professor] (1965), (Lukić, 2024, 343). Here, Jasna brings her little dog to weigh it on the street scale; since neither she nor the scale operator can make the dog stand still, passers-by spontaneously gather, make suggestions, and in the end the mathematics professor solves the problem by a simple subtraction operation. For today's readers, one of the most noticeable differences between the depiction of street life in Lukić's early work and our everyday life is precisely this ease of communication with strangers and specifically the feeling of safety within the community. This holds even when the conversation demonstrates an essential misunderstanding between children and adults, as in the story *Lutka bez glave* [Doll with No Head] (1965) (Lukić, 2024, 340), in which the little girl does not hesitate to argue with an unfamiliar adult.

A strong signal of familiarity is the fact that the unnamed adult characters in these stories are mostly addressed as *čika* and *teta*. Although the terms in question mean respectively "uncle" and "aunt", in the modern context they have become informal names for adults used by young children. Lukić's adult characters are usually not addressed as *drugovi*, socialist comrades: *čika* and *teta* connote intimacy and a kinship context. The short story *Čika* (1965), (Lukić, 1979, 94) focuses precisely on the forms of address: the narrator remarks that children address him alternately as *ti* (informal "you", an equal) when he is bareheaded, *drug* ("comrade") when he's wearing a beret, and *čika* ("uncle") if he's wearing a hat – and the last form is coupled with a warning to be careful on the slippery sidewalk.

TRAMS AND TROLLEYBUSES: MOBILE THIRD PLACES

Perhaps the most distinctive variant of the third place that we find in Lukić's opus are trams and trolleybuses. These public transit vehicles are among the most common themes of Lukić's urban poetry (from his early collection of poetry, *Moj trolejbus* [My trolleybus] (1962), to one of the last ones, *Troletramvajbus* [Trolleytrambus] (2002). The trolleybus and the tram, viewed as symbols, represent focal points for

various thematic aspects of children's poetry during the socialist era: they are symbols of technological progress, but at the same time of social, collective work, visualized as fun and attractive, and above all an indispensable part of urban childhood.[13] Poems depicting realistic, everyday travel by public transport and its unavoidable conflicts, such as *Mali grof u tramvaju* [The Little Count on the Tram] (1962), (Lukić, 2024, 257–258), or *Dokle ti trolejbusi* [How Long Will the Trolley] (1977) (Lukić, 2024, 264) though relatively rare, are present.

As Jovan Ljuštanović (2009, 172–176) has shown, Lukić takes an important pedagogical socialist impulse from the pre-war poetry of Aleksandar Vučo, especially his classic poem *Moj otac tramvaj vozi* [My Father Drives the Tram]. For Lukić's lyrical self, as well as for his child protagonists, the trolleybus is a mobile space for play and imagination. The poem *Moj trolejbus* [My Trolleybus] (1962), could be viewed as programmatic: the poet's imaginary trolleybus is to represent "a children's car – it goes around all the time"[14] and would go from one pastry shop to another. The poem *Za Mesec* [To the Moon] (1962), similarly offers a vision of the first trolleybus that will travel to the Moon: the driver will be a scientist, and the passengers "children and poets".[15]

Other poems and stories are closer to everyday life. *Poslednja stanica* [The Last Stop] (1962), describes an anthropomorphised, tired trolleybus, resting at the final stop before returning to work. As Ljuštanović (2009, 176) perceptively notes, "The last stop is near the subject's house and he often looks at the trolleybus. It seems that this is about urban intimacy that emerges from necessity, from the physical proximity of certain objects, things and places". Urban intimacy is, indeed, a good description of the relationships that Lukić's children protagonists develop with their surroundings, imbuing them with an animist energy. The eponymous protagonists of the short story *Trolejbus i lopta* [The Trolleybus and the Ball] (1965) (Lukić, 1979, 60–61), hover on the verge between animated and unanimated beings: as children play football in an empty field near the street, in a typical third place, a trolleybus drives by, "fat from his many passengers, red from running" (Lukić, 1979, 61), the ball rushes under its wheels, and only the driver's quick reaction saves it. Lukić ends the story both with a realistic, friendly interaction between the driver and the boys and the image of the front wheel "kissing his girlfriend, the ball".

Children's fascination with technology and vehicles is translated into children's play, but also into vacant time spent in the street while 'hanging around'.[16] In the short story *Vožnja po gradu* [A Ride Around the City] (1965), the boy protagonist Joca finds a screw and hopes that the owner of the screw will come along and give him a ride. He imagines a sequence of various vehicles (bus, truck, car, etc.), but in the end it turns out that the screw belongs to a more modest means of transportation, more suitable to Joca's age – a scooter. The initial situation already realistically sets the framework for Joca's 'entertainment': "Today Joca has no money for the cinema, he is not interested in football, so he walks around the city and looks at vehicles. It doesn't cost him anything, and he is interested in bicycles, cars, trucks and trolleybuses" (Lukić, 2024, 348–349). One of Lukić's most famous poems, *Ivin voz* [Iva's Train] (1963), also connects children's play, the street and vehicles, in its image of children running down the street simulating a train composition.

We can bring this segment to a close with *Pesma za robnu kuću* [A Poem for a Department Store] (1977) (Lukić, 2024, 302), a less-known work from Lukić's mature period that transforms the public-owned department store into a space for play. The little girl protagonist does not ask her father to buy her anything, but rather to ride the escalator with her, emphasizing that later she will be doing it on her own: "I don't need either you or mum".[17] It would be easy to connect this poem with the advertising campaigns that accompanied the opening of the Department Stores Belgrade chain in the mid-1960s and the broader cultural context – the success of department stores reflected the rise of consumerism in Yugoslav society. As Ana Zorić and Aleksandra Đorđević (2021) have shown in their paper (based partially on the analysis of extant advertising material), the entire architecture, positioning and internal spatial organization of the new department store buildings were determined both by consumerist culture and by socialist ideology. Yet, in Lukić's poem

13 An interesting interpretative possibility has been opened by Ivana Damnjanović (2023, 9), who offers a short overview of the development of the Belgrade public transit system viewed through the lens of sociotechnological imaginaries: "The concept of sociotechnical imaginaries was introduced by Jasanoff and Kimi, with the explicit intention of facilitating research on the "relationship of science and technology to political power". This concept would also prove remarkably useful in a future examination of literary representations of technology.

14 "Ova su kola za decu – / Idu stalno u krug. // Stanice naše bi bile / poslastičarnice sve" (Lukić, 2024, 260).

15 "U prvi trolejbus za mesec / deca i pesnici će sesti. […] Voziće ga naučnik, jedan / prijatelj tajanstvenih čuda" (Lukić, 2024, 259).

16 For an extended discussion of various leisure activities children can perform in the streets cf. Murray and Cortés-Morales (2019, 119–123).

17 "Vodi me, tata, u kuću robnu, / da napravimo vožnju probnu. […] A posle probe ići ću sama, / niste mi potrebni ni ti, ni mama" (Lukić, 2024, 302).

the child's attention is not focused on objects such as toys or sweets, but to the adventure of independent travel: the escalator, a modern means of transport, belongs to the same type of mobile third space as the tramway or the trolleybus. Simultaneously, the entire space of the department store is reinvented and re-coded as a safe third place for children.

CONCLUSION

In a way, Lukić's long career accompanied the development and disintegration of the SFRY. As we have seen, his children protagonists move through a rapidly changing urban environment, adapting and reinventing both their surroundings and themselves with exuberant joy. From the early short stories and poems that describe both postwar poverty and the emergence of modern cityscapes, to the autobiographical novels depicting Lukić's own childhood, the urban third places Lukić's child characters discover and exploit in their games are a testament both to the radical social changes of the twentieth century and the boundless creativity of childhood. The third places of Lukić's childhood included courtyards, urban voids and rural meadows, but after World War II they were superseded by third places created in the urban spaces of high-rise apartment towers, in parks and playgrounds, and even in such counterintuitive places as trolleybuses or department stores. By introducing these unlikely third places into Yugoslav children's literature, Lukić also created a distinct version of socialist sociotechnological imaginaries, intended for a children's audience and suffused with the spirit of child's play. Since that aspect of his work has not been sufficiently examined, this paper should be regarded as a preliminary examination for further research regarding both the representations of urban spaces in Serbian and Yugoslav literature and the opus of Dragan Lukić.

URBANI IN TRETJI PROSTORI V POEZIJI IN PROZI DRAGANA LUKIĆA

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*Članek obravnava urbani prostor, kot ga prikazuje poezija in proza povojnega pesnika, književnika in urednika Dragana Lukića (1928–2006), s posebnim poudarkom na tako imenovanih tretjih prostorih (*third place*; Oldenburg, 1999) za otroke. Lukić je v srbsko in jugoslovansko otroško poezijo po drugi svetovni vojni vnesel novo občutljivost, pri čemer je gradil na avantgardni dediščini tridesetih let in ustvarjal dostopna besedila za takratne otroke. Z uporabo večdisciplinarnega okvira na presečišču literarne zgodovine in analize, sociologije urbanega prostora, arhitekturne in kulturne zgodovine članek preučuje Lukićeve otroške protagoniste v družbenih spremembah, katere so se odražale tudi v prostoru. Kot predstavnik socialistične moderne je Lukić upodabljal urbane tretje prostore. Njegove kratke zgodbe in pesmi opisujejo tako povojno revščino kot tudi nove mestne pokrajine socialističnega modernizma. Medtem, ko so pred- in medvojni tretji prostori Lukićevega otroštva vključevali dvorišča, mestne praznine in zapuščene travnike, so jih po drugi svetovni vojni nadomestili tretji prostori novih stanovanjskih blokov, parkov in igrišč, pa tudi trolejbusov ali veleblagovnic. S takšnimi, novimi tretjimi prostori otroštva Lukić soustvarja posebno, socialistično (jugoslovansko) različico socialističnih družbeno-prostorskih in tehnoloških predstav, namenjenih mlajšemu občinstvu. V njegovih delih, ki jih Lukić postavi v njegovo sodobnost, je tretji prostor prostor igre, svobode, hkrati pa tudi prostor, v katerem se vzpostavlja in gradi zavest o odgovornosti odnosa med posameznikom in skupnostjo.*

Ključne besede: Dragan Lukić, srbska otroška književnost, jugoslovanska otroška književnost, tretja mesta za otroke, urbani prostor

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THE EVOLUTION OF CHILD *FLÂNEUR:* STREET SMART KIDS AND THE CITY IN CROATIAN 20TH CENTURY CHILDREN'S LITERATURE

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ABSTRACT

The paper interprets children's novels by the Croatian children's literature classic Ivan Kušan, written between the 1950s and 1980s, which explore the relationship between the child and the city. Based on the concept of the flâneur, it is examined to what extent Kušan's child characters can be read as flâneurs, and it is concluded that the pragmatics and organization of the plot in the form of a quest shape child characters focused on physical rather than cognitive action, and thus they do not fit into the concept of the contemplative flâneur. Instead, Kušan's child characters are interpreted as street smarts and their relationship with the city is read within the framework of walking as a process by which space (the city) is transformed into a place.

Keywords: Ivan Kušan, Croatian children's literature, walking, *flâneur*, child *flâneur*

L'EVOLUZIONE DEL BAMBINO *FLÂNEUR*: I BAMBINI STREET SMART E LA CITTÀ NELLA LETTERATURA PER L'INFANZIA CROATA DEL XX SECOLO

SINTESI

L'articolo analizza i romanzi per ragazzi del maestro della letteratura per l'infanzia croata Ivan Kušan, scritti tra gli anni '50 e '80, che esplorano il rapporto tra il bambino e la città. Basandosi sul concetto di flâneur, si valuta fino a che punto i personaggi infantili di Kušan possano essere interpretati come flâneur. Si conclude che la pragmaticità e l'organizzazione della trama sottoforma di ricerca modellano personaggi infantili incentrati sull'azione fisica più che cognitiva, che quindi non rientrano nel concetto di flâneur contemplativo. I bambini di Kušan sono interpretati come street smart *e il loro rapporto con la città viene analizzato attraverso la pratica del camminare, intesa come un processo nel quale lo spazio (la città) viene trasformato in luogo.*

Parole chiave: Ivan Kušan, letteratura per ragazzi croata, camminare, *flâneur*, bambino *flâneur*

INTRODUCTION[1]

The second half of the 20th century in Croatian children's literature – as in other Yugoslav children's literatures – was marked by a dialectic of innovative and normative poetic tendencies, which to some extent also reflected the social changes taking place in Yugoslavia during the period of early socialism. In the context of the topic of children's relations with the city, the most important social change is, of course, the growing urbanization of the population: after World War II, in the period until the beginning of the 1950s, the population of Zagreb, for example, increased by more than 100,000, numbering more than 350 000 inhabitants in 1953 (Žerjavić, 1993), and the situation was similar in other urban areas. It is therefore not surprising that among the most striking features of Croatian children's literature of that time is the spatial turn that imposes the city as the central space of children's narrative prose, which historians of Croatian children's literature (Crnković & Težak, 2002; Hranjec, 2006) see as a distinct sign of the new and innovative. The urban child becomes the protagonist of children's literature and its implicit reader, and urban spaces mark the topology of twentieth-century childhood. Authors who publish children's poetry and prose from 1950s to 1990s almost invariably incorporate the imagology[2] of the city into the experiential framework of the implicit reader, gradually forming the image of the urban children for who the relationship with the city represents a significant part of their identity.

In this paper, I examine children's use of urban space in Croatian children's prose from the second half of the 20th century, analyzing the relationship between the child and the city, as well as the author's conceptualization of the physical and mental (urban) spaces of childhood. Using the children's novels of Ivan Kušan (1933–2012), a children's literary classic of 20th-century Croatian literature, I will interpret the topic of the city in children's literature of that period. I am particularly interested in the motif of wandering around the city, of unsupervised children's walking, and the associated imagery of freedom or fear: is walking around the city in 20th-century children's literature a frightening or liberating experience? Kušan's novels are particularly suitable for analysis in this sense, since they all place children's characters in an urban space and give that space a significant role in the development of the plot. Moreover, roaming around the city associates with the figure of the *flâneur*, a creative wanderer who, by walking through the city, absorbs impressions and allows the city to transform him. This metaphorical figure has recently become interesting in the context of children's literature theory, in which the issue of children's independence is linked to the freedom of the *flâneur*. Kušan's children's novels open up interesting assumptions about children's ''use'' of the city and their unsupervised movement through the city, and therefore I will also address potential *flâneur* perspective of his novels in my interpretation, bearing in mind the complexity of children's relationship to space, which is regulated by the spatial, cultural and social transformation of children's social environment during the 20th century. In this sense, it is inevitable to question the adequacy of the metaphor of the *flâneur* in the context of children's literature in the late 20th century. The example of Kušan's children's novels shows that its reach has been exhausted and I see it as uncorresponding in the context of Croatian children's literature in that period.

Croatian children's literature during the 20th century affirmed the topic of the child in the city, starting in the 1930s with the novels of Mato Lovrak (1899–1974), Josip Pavičić (1895–1963), Zora Ruklić (1897–1982) and Mirko Jelenčić (pseudonym of Želimir Gumhalter, 1914–1947). The image of the city in children's literature during the 1930s is somewhat close to the presentations of the city in non-children's Croatian literature of the time, with an emphasized social component and in a dialectical range from a hostile portrayal – such as Mato Lovrak who in his novel *Enemy number 1* from 1938 presents the city as children's enemy number 1 – through an emphasized social-naturalistic

1 This paper was created as part of the institutional research project *Innovations in Reading and Teaching Literature: Reading through Film, Image and Emotion* (IUČIP), funded by Source 581, Recovery and Resilience Mechanism (NextGenerationEU).

2 The term imagology in the humanities is used, as interpreted by Davor Dukić in a propaedeutic manual on imagology *Kako vidimo strane zemlje* (2009), as the name for studying literary ideas about foreign countries and peoples, as well as one's own country and people (Dukić, 2009, 5), where the name of the discipline, as Dukić admits, has a ''much wider etymologically implied scope of meaning'', i.e. it could also mean the science of imaginaries (Dukić, 2009, 5). Zrinka Blažević, however, only partially accepting the content and interpretational emphases of traditional imagology, suggests transdisciplinary understanding, offering a more comprehensive definition of preconceptions as ''interfering configurations of mental images, textual and non-textual representations and forms of practice, which are constituted within a certain socio-historical context'' (Blažević, 2014, 130). I use the term image in the research of textual representations and practices as structures that are both productive and organizing, and which do not refer, as in traditionally understood imagology, exclusively to hetero-images and self-images of foreign countries, but to mental images that constitute the opinion about oneself and the world in general. In my research images are distinguished as fundamental discursive units – ambiguous, ambivalent structures that establish thinking shortcuts, i.e. perpetuate stereotypical thinking about complex phenomena.

portrayal in Mirko Jelenčić's novel *Kids* (1935) to a significantly more positive presentation in Josip Pavičić and Zora Ruklić who see the city (also) in the context of children's emotional space. However, until the first children's novels by Ivan Kušan, the topography of the modern city was not adequately reflected in Croatian children's literature.

CHILDREN AND THE CITY: THE HISTORY OF LOVE

Although it did not appear in Croatian children's literature until the 1930s, and even then only cautiously, children's walking around the city – independently, in the company of peers or accompanied by an adult – is not a new historical phenomenon: the imaginary history of children's walking around the city would begin with the first records as early as the Middle Ages, as reported by Barbara Hanawalt (1993) in her study of childhood in medieval London.

Children's involuntary and unwanted life on the streets and the consequent walking, wandering and ''cruising'' through city streets have persisted from the Middle Ages until modern times, as seems to be the case from (sporadic) historiographical insights into spatially and temporally distant historical articulations of childhood. The growth of cities in the late 18th and especially the 19th centuries, explains the historian of walking Joseph Amato, ''produces'' new types of walkers:

> *Cities fostered new breeds of walkers. The disciplined pedestrian, the speeding commuter, the idling window shopper, the elusive flâneur, and the organized marching groups were foremost among them. Nineteenth-century London and Paris perhaps best reveal, of all Western cities, the metamorphosis of the urban walking environment and the genesis of the gallery of contemporary urban walkers.* (Amato, 2004, 153)

The child is not a negligible part of this gallery: as Timothy J. Gilfoyle (2013, 400) states in an article about American urban child vagrants and delinquents in the 19th century, numerous abandoned children spent most, if not all, of their lives on city streets.

In Croatian cities during the same period, the situation was similar, although the numbers were certainly less dramatic: as Štefka Batinić (2013) states in her study of orphans at the turn of the 19th and 20th centuries, children during that period were often left on the streets, caught begging, wandering, selling or running away from home. In 1911, Croatian pedagogue Stjepan Širola testified to a very similar situation to that described by Gilfoyle:

> *Anyone who has even looked around the streets of larger cities, and the streets of our white Zagreb are enough for him, has noticed a whole host of children, often ragged, naked and barefoot, wandering and fooling around the city without aim or purpose. These are little vagrants for whom the street is a school of all those evils, which will later – when they grow up – bring them into conflict with existing social institutions, with the law, and finally into prison. These are the unfortunate neglected children, the streetwalkers, the biggest and most angry wound of our cities.* (Širola, 1911, as quoted in Batinić, 2013, 28. [My translation])

However, the child and the city still have a complex, albeit only indirectly articulated, common history, which is not only marked by pathological phenomena such as child homelessness, vagrancy, begging or crime. Amato emphasizes this connection with a lovely sketch of the special way children ''adopt'' urban space: ''Old and young did not move the same. Children played, chased and darted, lolled and went arm and arm, and moved at slowing speeds as they put themselves on display and flirted'' (Amato, 2004, 164).

Croatian historical experiences of children's relationship with the city are relatively wide-ranging, from children's unsupervised, homeless wandering around the city and surviving on the social fringes, which Širola emphasizes, to the civic custom of structured walks that developed during the 19th century and persisted until the mid-20th century, and which included children from bourgeois families who, by walking with their parents or nannies, learned the rules of good civic behavior and in that context did not have the opportunity to explore the city independently. Only after the mid-20th century, with the rapid development of cities and the growth of the urban population, the modernization of urban housing and transport, and the changes taking place in urban families in the new, socialist social order, did children gradually gain opportunities to explore the city independently, with the key change in that period relating to the employment of both parents and therefore extended daily periods of children's independence. This independence, however, was under attack by pedagogical authority conceptualized in the negative image of the so-called street upbringing, which includes notions of negative peer influence and the influence of older age groups, of the city street as a criminogenic factor, and of adults' fear of not having control over a child's free time (Duda 2015). However, as Igor Duda (2015) shows in his study of childhood in the 20th century, the street gradually took shape in the 20th century

as a social space in which the child learns the process of self-articulation outside the reach of family and educational authority.

KUŠAN'S URBAN SETTINGS AND DIALECTIC OF SPACE AND PLACE

Ivan Kušan, a classic of Croatian children's literature from the second half of the 20th century, published his first children's novel in Zagreb in 1956, introducing the emblematic child character of the boy Koko, who remains the main character of the author's six children's novels. Already in his first, and then in subsequent children's novels, he accepts and develops the influences of so-called Western novels, emphasizing the action, adventure and justice as constructive narrative elements. His protagonists – elementary school-age boys – are faced with a puzzle in each novel that they are trying to solve, moving more or less independently through urban and suburban spaces and establishing a strong sense of urban identity. As an author with a distinct spatial imagination, Kušan uses the urban topography of Zagreb (in four novels) and Paris (in one novel) as an important narratological device, organizing the plot layout within specific spatial coordinates of both Zagreb and Paris, thus shaping the city as a plot. To solve the puzzle, the boys must "solve" the city.

The literary history of Croatian children's literature agrees that Kušan's children's novels produce a modernist paradigm in Croatian children's literature of the mid-20th century. The key features of this paradigm are rhetorical autonomy with a deflection from the linguistic standard, a relaxed attitude towards storytelling, and benevolent irony. Furthermore, it seems reasonable to establish that an important element of the reception success of Kušan's children's novels is the motif of boyish empowerment and circumvention of authority. On the other hand, organizing the narrative around a group of boys in the first novel and then boyish couples in subsequent novels has the effect of normalizing and even normatizing the inelastic gender paradigm that dominated the literary space of Croatian children's literature until the end of the 20th century. In the critical reflection on Kušan's children's novels, the following stand out: originality, new approach, authenticity, persuasiveness, likable and mischievous children's characters, and urbanity as a specific characteristic that stands out from the previous rurality of Croatian children's literature personified in the work of Mato Lovrak.

Kušan, on the other hand, places seven of his children's novels written from the 1950s to the 1980s (*Uzbuna na Zelenom vrhu*, 1956; *Koko i duhovi*, 1958; *Domaća zadaća*, 1960; *Zagonetni dječak*, 1963; *Lažeš, Melita*, 1965; *Koko u Parizu*, 1972 and *Ljubav ili smrt*, 1987)[3] in an urban setting, starting with the suburban settlement in which the action of his first novel *Uzbuna na Zelenom vrhu* (*The Mystery of Green Hill*, 1956) takes place and continuing to the metropolis which is the setting of the novel *Koko u Parizu* (*The Mystery of the Stolen Painting)*, published in 1972. In this sense, Ivan Kušan's novelistic oeuvre is suitable for analyzing children's relationships with the city. It is not unimportant that in all of his children's novels, this author engages his children's characters outside the political constraints that were an important means of regulating the field of Croatian children's literature until the mid-1950s – the heroes of his children's novels do not see their social environment as marked by political interpretation at all.

Already in his first children's novel (*The Mystery of Green Hill*, 1956) and then in the sequels of the narrative saga about the boy Ratko Milić Koko (*Koko and the Ghosts*, 1958; *Zagonetni dječak* [*The Mysterious Boy*, my translation of the title], 1963; *The Mystery of the Stolen Painting*, 1972), Kušan makes poetic decisions by which he adapts typical and representative patterns of children's adventure storytelling to his narrative. This primarily refers to the gathering of thematic nodes around a secret and the quest to unravel the secret and solve the task, then to the introduction of a group of boys with an atypical, hierarchical group dynamic, and the spatial motivation of the plot by limiting the space of events and paying special narrative attention to the dialectic of space and place. In using the terms space and place, I rely on the interpretations of Michel de Certeau (1988), who emphasizes space as somewhat ambiguous, while place is more concrete and ''practiced'' (which in children's literature could mean practiced through play), and on the interpretation of Yi-Fu Tuan (2001), who distinguishes space from place by seeing the former as abstract and undifferentiated and attributing to the latter characteristics of familiarity and security.

Spatiality in children's literature, as Maria Sachiko Cecire et al. (2015) show, forms an important structural framework for storytelling insofar as the ontological demands of children's literature are established in intrinsic negotiations about the contact and separation of adults from non-adults in order to maintain the illusion of the child within

3 Kušan's children's novels have been translated into a number of languages, and three are available in English translation: novels *Uzbuna na Zelenom vrhu,* translated as *The Mystery of Green Hill*; *Koko i duhovi* translated as *Koko and the Ghosts* and *Koko u Parizu*, translated as *The Mystery of the Stolen Painting*.

a relationship marked by a disproportion of power and influence. In Kušan's first children's novel, the events take place in a suburban, isolated settlement with only a few houses, which allows the children's characters to independently manage the space. Adult characters in such a spatial definition can be moved to the edge of the events, and even completely thrown off that edge, and the dynamics of the children's group are generated by the spatial and through it emotional distance of the parental generation from their offspring and the children's compensation for this distance in the peer environment. We find a corresponding spatial organization, but with the development of the author's condition more carefully developed, in all of Kušan's children's novels. In the novel *Koko i duhovi* (*Koko and the Ghosts*), for example, one can apply Johan Huizinga's (1992) interpretation of play as constituted by abstract shelter, separation from reality, and the creation of separate places – fenced, forbidden, isolated, with their own rules. The boys' search for a mystery, and then for its solution, is based on shelter, mysterious places, secret underground tunnels, buried hideouts, deserted islands, almost as a textbook example of Huizinga's interpretation. Huizinga's theory of the metaphorical doubling of the space of play in ''temporary worlds'' nested in real spaces is even more impressively manifested in the parallelism of children's and non-children's spaces in this novel, where the topology of the children's world is located in the domain of the superfluous, discarded, uninteresting to adults – in an unused scrap metal warehouse, but right next to a familiar home, on a deserted island in the middle of a city park, in a secret underground corridor in one's own basement. This attractive spatial dialectic of the familiar/unfamiliar and the foreign/mysterious in the novel is very skillfully complicated into a whole series of binary oppositions whose persistence is destabilized and even abolished by the end of the novel. This is particularly evident in the problematization of the useful versus the useless, whereby usefulness is usually, and even conventionally (in children's literature), grouped on the adult side and uselessness is attributed to the childish, which Kušan mimics by placing the children's game in a useless, neglected warehouse in the immediate vicinity of adults, but to which adults have no access. However, by the end of the novel, such an expected semantic distribution is destroyed and the children's investigation leads to the resolution of a very real mystery: boys discover a supposedly deceased man hiding in an underground hideout,[4] and they expose the criminal activities of two adult villains, who sent threatening letters to Koko's family, intimidated them, tried to poison them with gas, and organized the kidnapping of a girl, Koko's sister Marica. Furthermore, the boy's relationship with the city is emphasized by the structure of gradation: the boy's search for answers and the solution to the dangerous riddle leads them from the first spatial circle in which they are perfectly at ease – their own street, an abandoned warehouse next to the house, the streets leading to the school, to the second spatial circle that is somewhat wider, but still familiar enough – the nearby square, the city park, the cinema, and all the way to the most distant, unknown and threatening city spaces in which the title character Koko wanders in search of his kidnapped sister. This spatial arrangement, which reflects the dialectic of safety (near the house) and danger that grows the further the child characters move away from home, does not signal, as it might seem, the conventional fear of adults from children's independent wanderings through the city, since the child successfully navigates unfamiliar parts of the city (with a little help from his pet dog) and solves the difficult task of rescuing his kidnapped sister.

In his subsequent novels, Kušan will avoid such topographical semantics and will not mark more distant spaces as more dangerous, but will use his child characters to free more and more of the city space from the strict supervision of adults. Perhaps the most representative in this sense is the novel *Domaća zadaća* [*Homework*, my translation of the title], in which the child characters use the city space almost without any restrictions, and children's walking through the city is marked by a wide range of moods and emotions, starting from anger, rage and frustration, through fear and nervousness, and ending with more pleasantly intoned walks associated with the motifs of children's romance. In this novel, the author very directly undermines both the narrative and real power of the adult characters, thereby freeing the children's autonomous spaces and allowing the child characters to make contingent use of the city. It is interesting to note that among the consequences of such a relationship between a child and the city is also peer violence: in a heightened conflict between different children's groups, one of the boy characters – who is also the main villain in the novel – will suffer punishment prepared for him by his child opponents, which consists of kidnapping and locking him in a box in order to frighten him and punish him, but the box and the boy inside it unexpectedly end up in a city cleaning truck, which causes panic among the boys who put the culprit in the box.

4 Berislav Majhut (2022) also attributes a political dimension to this motif, believing that the character of a rich miser hiding underground immediately after World War II (the events in the novel are dated to 1946) can also be interpreted as a sympathizer of the failed Ustasha regime hiding from the new socialist government.

This motif seems significant to me in the context of the relationship between a child and the city, pointing to the dialectic of children's freedom and danger: unsupervised wandering around the city and ''conquering'' city spaces also entails responsibility. Fortunately, the boy is rescued from the box in time and none of the children's characters will experience any lasting negative experiences in interacting with the city. On the contrary, this novel materializes Yi-Fu Tuan's metaphor about the transformation of abstract space into more emotionally charged place: '''[s]pace' is more abstract than place. What begins as undifferentiated space becomes place as we get to know it better and endow it with meaning'' (Tuan, 2001, 6). The city that the boys get to know by ''acting'' in it from space becomes a place marked, among other things, by emotion.

This process is even more pronounced in the metafictional novel *Koko u Parizu* (*The Mystery of the Stolen Painting*). Two boys go to Paris to visit relatives, one of whom has already been to Paris and in the process of preparing for the trip scares his younger friend with fantastic and exaggerated stories about the dangers of the big city: kidnappings, murders, thefts, robberies. The boys do find themselves in danger in Paris, and the younger and more inexperienced of them is kidnapped by two young men who demand a high ransom for him. The adventure develops into a kind of slapstick comedy in which several groups of children rush through the city in a stylized, dizzying chasing in search of each other, and the central motif is the painting Mona Lisa, or rather its copy, which becomes the ransom for the kidnapped boy. The stylized event in the unstylized space (which is determined by the topography of the real city) is ultimately resolved as a dream of one of the boys, but this metafictional intervention is only the final act in the process of taming and domesticating the metropolis, which from the initial frightening and dangerous, through children's wandering and getting to know it, gradually becomes a familiar and beautiful, and even safe city.

In the novel *Lažeš, Melita* [*You are lying, Melita*; my translation of the title], however, the motif of the city is firmly connected to the problem of children's perception and incorporated into an interesting dialectic of the pedagogical and ethical that is realized in the problem apostrophized in the title: children's lying, or making up. The protagonist Melita constantly makes up things and events what her worried parents see as a pedagogical problem and call lying. When the mother has to leave home urgently for few days to care for her sick aunt, Melita's father and brother use this time without mother's regulation to ''cure'' or discipline the girl's tendency to make up stories, using pedagogically and also to a common sense dubious methods: by making her every ''lie'' come true with the help of a wide network of adult friends and acquaintances. However, in the end, the child's lying is opposed by the ethically much more serious offense of adult lying, since almost all the adult characters in the novel have blatantly lied, including the father who takes sick leave even though he is completely healthy and the mother's supposedly sick aunt who invented the illness in order to get the mother to visit her. The author's argument is clear that the boundary between lying and making up stories, or between what is permitted and what is not permitted, is the boundary of adulthood. This is also reflected in the relationship to (urban) space, which opens up to the child and the adult in different ways, favoring a personal perspective over the conventional relationship to space. A good example of this is the metaphor of art, or rather the conversation that a girl has with a painter acquaintance who is trying to teach her to accept and nurture her own perception of the world in which her numerous and imaginative inventions are possible and real, and the imagology of the city, which changes and adapts to the child's view, is also adjusted to this perspective. The girl, who is cheerful and lively at the beginning of the novel, also sees the city as a happy and bright place, but as the story develops in which her foolish lies begin to come true, the city also changes and becomes gloomy and confused. In this sense, the novel's acumen is completely compatible with the thesis of David Harvey who maintains that the city is created through the imagination: it is imagined before it becomes material and representations are the product of the imagination (Harvey, 2003, as quoted in Murray, 2015, 34).

FLÂNEUR OR STREET SMARTS: CONTEMPLATING AND AGENCY

All of Kušan's children's novels are novels about children and the city, and in this context the theme of walking through the city comes to the fore: children's independence in the city intersects with the motif of walking as the most common and ordinary way of children's urban mobility. The motif of walking through the city is contained in one of the most vital cultural images of modernity: in the figure of the *flâneur*. The *flâneur* is a city walker, a man of the masses, who wanders aimlessly through the streets of a nineteenth-century city, constantly searching for new sensations, which he finds on the city streets. He is an idle, well-off man, who in his *flâneuring* develops highly perceptive, artistic affinities and at the same time affirms the commodification aspect of the modern city by looking at shop windows and wandering through shopping arcades. The *flâneur* is a figure of the multitude, he uses the refuge of anonymity in the newly growing cities

and symbolizes the appropriation of public space. His imagological outlines were most extensively articulated by Walter Benjamin in his monumental but unfinished work on the Parisian arcades in the 19th century (published posthumously in 1982 under the title *Das Passagen-Werk*). In Benjamin's interpretation, the ontology of the *flâneur* is inextricably linked to the child, which refers not only to the child-*flâneur* that Benjamin constructed in his writings on his childhood in Berlin, but also to the identification of the child and the *flâneur* in Charles Baudelaire's *Le Peintre de la vie moderne* (*The Painter of Modern Life*, 1863), on the basis of which Benjamin develops his concept of the *flâneur*. Baudelaire likens the *flâneur's* cognitive and admiring wanderings through the city to a child's discovery of the world, a child who absorbs everyday impressions without inhibitions. It is precisely this characteristic of flaneurism that Eric Tribunella (2010), who was the first to address children's wandering around the city in American children's literature and proposed the concept of the child *flâneur*, relies on. Tribunella (2010) singles out the element of cognition as a key characteristic of children's flaneurism: for children's characters in the novels he interprets,[5] walking around the city represents a cognitive activity. A child's independent wandering around the city is a kind of a liminal event in a child's life, and children's flaneuring, as Tribunella shows, is contained in the effect of reciprocity by which the child and the city reflect each other and in which there is no place for adults. In the novels that Tribunella interprets, children's direct experiences of the city exclude adult figures, who function as marginally present children's mentors or advisors, thus freeing the children's experience of the city as an exceptional, extraordinary experience that abolishes the usual family order and bypasses or temporarily suspends parental authority. In Olga Bukhina's paper (2019), children's strolling is intertwined with observation, even voyeurism, in a similar way to Tribunella's interpretation: children's strolling is a contingency of independent exploration, walking, and cognition. On the contrary, Ada Bieber (2021), in her article on the child *flâneur* in East German film around the mid-20th century, reads children's strolling primarily in the context of the politicization of a child who, walking through the large East German cities of that period, primarily Berlin, is exposed to a series of political messages, including propaganda, in line with the general political image of socialist society in the 20th century. All these interpretations of the child *flâneur* coincide in the motif of the (independent) child's strolling through the city as a liminal experience from which the child emerges changed.

Given that all of Kušan's children's novels use the motif of a child's strolling through the city, it is interesting to consider whether it represents the child's liminal experience: are Kušan's child characters actualy *flâneurs*? In all of Kušan's children's novels, children's use of the city is pragmatic and active, and is similarly connected to the motif of boyish empowerment and circumvention of adult authority, as is the case in the novels interpreted by Tribunella. In conceptualizing space in all of his children's novels, Kušan directly negotiates the relationship between adults and non-adults, not only in organizing spatial coordinates, but also in using, occupying, and appropriating space in realistic children's novels (*Uzbuna na Zelenom vrhu* / *The Mystery of Green Hill*, *Koko i duhovi* / *Koko and the Ghosts*, *Domaća zadaća* [*Homework*, my translation of the title], *Zagonetni dječak* [*The Mysterious Boy*, my translation of the title]), in which children are assigned marginal, neglected, and even dangerous spaces that, through children's actions, become central spaces of the plot, while in children's novels with a metafictional structure, the author's conceptualization refers to the metaphor of space – the metaphor of the metropolis as a space of excitement and danger in *Koko u Parizu* (*The Mystery of the Stolen Painting*) and the metaphor of the love circle in which the lovers move in *Ljubav ili smrt* [*Love or Death*, my translation of the title]. The agency of the children's characters, however, is focused on physical, not cognitive action. They move through the streets to complete a task entrusted to them, discover new information, achieve their goals, and ultimately solve the central enigma of the novel. Kušan's novels are about action, not contemplation, and there is no aimless wandering in them. Walking through the city serves the plot, not the transformation of the child's character. In short, walking is pragmatic and ordinary, and its flânerie aspect is restrained, and even abolished. The practicality, activity and detective motivation of Kušan's children's characters distance them from the liminality and cognition of the *flâneur* child and bring them closer to the image of the streetsmart child, the child in a group whose agency is social and collective, the child who constructs and manages his own urban landscapes. In short: although Kušan's children's characters occasionally get lost and wander, turning into the wrong streets and following the wrong tracks, the relationship between the child and the city in his children's literature is nurtured by tasks,

5 These are Elizabeth Enright's *The Saturdays* (1941), Louise Fitzhugh's *Harriet the Spy* (1964), E. L. Konigsburg's *From the Mixed-up Files of Mrs. Basil E. Frankveiler* (1967), and Virginia Hamilton's *The Planet of Junior Brown* (1971). All of the novels are set in New York.

quests and adventures, thus leaving a contemplative and aimless *flâneur* behind. In this sense, Kušan's children's novels from the mid-20th century produce a new type of children's cultural imagination and imagology, privileging street-smarts as the protagonists of children's culture of the time. This typological change in Croatian children's literature is not only found in Kušan: in the novels of his contemporaries Milivoj Matošec (who shapes his child protagonists with a somewhat more contemplative, but still dominantly active motivation), Nada Iveljić, Zvonimir Milčec, Hrvoje Hitrec or Zlatko Krilić, who each of them writes about city children and form their experiential horizon in interaction with the city, they prefer an active, engaged child whose autonomy is manifested primarily in mastering (city) space. However, Kušan's oeuvre is perhaps the most significant in this sense, not only because of his pioneering status, but also because of the radical transformation of semantic paradigms within the field of children's literature. Through his direct questioning and even challenging of the normativity of adulthood in children's literature, Kušan transforms its traditional pedagogical stability, negotiating and challenging the authority of adults, which fully corresponds to the anti-authoritarian European children's literatures of the 1960s. In this process, among his most important imagological tools is the motif of the city, whose complex topographical grid and characteristic landscape of urban everyday life produce a children's cultural experience. As I have shown, Kušan does not present the city to his child characters, as a liminal, forbidden space, but as a living organism that, together with the child's action, contributes to the solution of the puzzles. The author is particularly successful in using ideas of useful and useless in interaction with the city: walking or wandering through the city, which the pragmatic world of adults may see as a useless waste of time, becomes a key puzzle-solving tool in Kušan's interpretation, articulating street-smarts as a late 20th-century children's hero.

RAZVOJ OTROKA *FLÂNEURJA*: IZNAJDLJIVI OTROCI Z ULICE IN MESTO V HRVAŠKI OTROŠKI KNJIŽEVNOSTI 20. STOLETJA

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POVZETEK

V drugi polovici 20. stoletja se je v hrvaški otroški književnosti zgodil svojevrsten prostorski preobrat, v katerem se je mesto oblikovalo kot osrednji prostor otroške pripovedne proze. Mestni otrok je postal protagonist otroškega literarnega polja in hkrati njegov implicitni bralec, za katerega je odnos do mesta postal pomemben del njegove identitete. Članek preučuje otroško rabo mestnega prostora v hrvaški otroški prozi druge polovice 20. stoletja. Analizira odnos med otrokom in mestom ter konceptualizacijo fizičnega in mentalnega (urbanega) prostora otroštva v otroških romanih Ivana Kušana. Kušan, klasik hrvaške otroške književnosti druge polovice 20. stoletja, je v obdobju od petdesetih do osemdesetih let 20. stoletja napisal sedem otroških romanov, kateri so postavljeni v urbano okolje. V vseh so tematska vozlišča zbrana okoli skrivnosti in njihovih razkritij. V vseh so protagonisti organizirani v fantovske skupine z nehierarhično skupinsko dinamiko in v vseh je zgodba poudarjeno prostorsko motivirana. Prostorska organizacija romana se kaže v strukturiranju različnih prostorov za odrasle in otroke, v dialektiki koristnega in nekoristnega v podeljevanju prostorskih značilnosti ter v intenzivni interakciji otrok z mestom, kjer se otroški liki gibljejo prosto in brez nadzora odraslih. Skratka, Kušanovi otroški liki so proučeni v povezavi z metaforo flâneurja glede na teorijo Erica Tribunelle o otroku flâneurju, ki potepanje po mestu dojema kot transformativno, kognitivno in s tem liminalno izkušnjo. Kušanovi otroški romani pa potrjujejo akcijo in fizično delovanje, poudarjajo iskanje in otroško odločenost, da raziščejo skrivnost, s čimer se oddaljujejo od kontemplativne, kognitivne in liminalne narave pohajkovalca.

Ključne besede: Ivan Kušan, hrvaška otroška književnost, hoja, *flâneur*, otroški *flâneur*

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SLOVENSKA RECEPCIJA ROMANA *KOČA STRICA TOMA*

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IZVLEČEK

Namen pričujočega članka je opredeliti recepcijo romana Koča strica Toma *v slovenskem kulturnem prostoru od izida prvih priredb leta 1853 pa do trenutnega desetletja. Na podlagi pregleda 942 zapisov o tem literarnem delu ugotavljamo, kako so se tekom let spreminjale interpretacije besedila. Medtem ko zgodnji zapisi izpostavljajo protisuženjsko sporočilo romana, so poznejše ocene osredotočene na njegovo estetsko vrednost in na to, v kolikšni meri je ostal relevanten kot družbenokritično delo. Recepcija* Koče strica Toma *je bila še posebej živahna v zgodnjem socialističnem obdobju, medtem ko je proti koncu 20. stoletja opaziti postopno upadanje kritiškega zanimanja za to literarno delo.*

Ključne besede: Harriet Beecher Stowe, *Koča strica Toma*, recepcija, ameriška književnost, literarno prevajanje, rasizem

LA RICEZIONE DEL ROMANZO *LA CAPANNA DELLO ZIO TOM* IN SLOVENIA

SINTESI

L'obiettivo di questo articolo è di determinare quale fu la ricezione del romanzo La capanna dello zio Tom nella sfera culturale slovena, dalla pubblicazione dei primi adattamenti nel 1853 al decennio attuale. Grazie all'esame di 942 scritti relativi all'opera letteraria, è stata analizzata l'evoluzione delle interpretazioni del testo nel corso degli anni. Mentre le prime analisi ne sottolineavano il messaggio antischiavista, i commenti più recenti sono centrati sul valore estetico dell'opera e sulla misura in cui è ancora rilevante come testo di critica sociale. La ricezione de La capanna dello zio Tom fu particolarmente viva durante l'inizio del periodo socialista, mentre si osservò un declino graduale dell'interesse dei critici per l'opera verso la fine del XX secolo.

Parole chiave: Harriet Beecher Stowe, *La capanna dello zio Tom*, ricezione, letteratura americana, traduzione letteraria, razzismo

UVOD

Roman izpod peresa Harriet Beecher Stowe z izvirnim naslovom *Uncle Tom's Cabin; or, Life Among the Lowly*, ki je v knjižni obliki izšel leta 1852, je kmalu postal največja literarna uspešnica v Združenih državah Amerike v 19. stoletju in je imel nezanemarljiv vpliv na tamkajšnjo javno razpravo o suženjstvu. Predvsem v severnih zveznih državah je bilo to književno delo sprva deležno pozitivnih odzivov, v poznejših obdobjih pa so mu mnogi začeli očitati, da izraža določena rasistična nagnjenja. Tudi kanonizirana literarna besedila tekom let namreč nemalokrat postanejo sporna (Karolides et al., 2011); kot ugotavlja utemeljitelj recepcijske estetike Hans Robert Jauss (1970), se iz generacije v generacijo spreminja *horizont pričakovanja*, in bralstvo posledično aktivno oblikuje *zgodovinsko življenje* določenega literarnega besedila – vsaka naslednja generacija na novo ovrednoti njegovo estetsko vrednost.

Koča strica Toma je nezanemarljivo priljubljenost dosegla tudi izven ZDA, denimo v nekaterih drugih kulturah, ki sicer niso vse imele neposrednih izkušenj s suženjstvom, vendar so se soočale z različnimi drugimi oblikami zatiranja (Karcher, 2004, 203). V pričujočem prispevku se bomo ukvarjali z odzivi na ta roman v slovenskem etničnem prostoru. Prve tri priredbe so posredne, saj so bile napravljene iz nemščine, medtem ko sta poznejši dve priredbi nastali neposredno na podlagi angleškega izvirnika. Prvi dve priredbi sta izšli že leta 1853, tj. v letu po knjižnem izidu izvirnika, in predstavljata začetek slovenskega prevajanja ameriške mladinske literature (Mazi-Leskovar, 2011, 70).[1] Priredbo z naslovom *Stric Tomaž ali življenje zamorcov v Ameriki*, ki je bila objavljena v Celovcu, je poslovenil Janez Božič, za priredbo z naslovom *Stric Tomova koča ali Življenje zamorcov v robnih deržavah svobodne séverne Amerike*, ki je izšla v Ljubljani, pa je zaslužen Franc Malavašič; slednje besedilo je bilo nato leta 1888 objavljeno še v jezikovno posodobljeni različici. Priredbo, ki je izšla leta 1918 in je bila nato leta 1932 ponatisnjena, je prevedel Silvester Košutnik, medtem ko je bila nova priredba Olge Grahor objavljena leta 1934. *Kočo strica Toma* iz leta 1954 je prevedla Olga Grahor, priredila pa jo je Kristina Brenk. Slednja priredba je doslej doživela kar deset ponatisov (1959, 1965, 1968, 1972, 1973, 1977, 1978, 1981, 1985, 1993), na podlagi česar je mogoče trditi, da je ta knjiga več desetletij spadala med klasična dela prevodne mladinske literature v slovenskem kulturnem prostoru in je bila eno izmed referenčnih literarnih besedil za obravnavanje problematike rasizma.

Predpostavljamo lahko, da je bilo zgodovinsko življenje *Koče strica Toma* v slovenskem etničnem prostoru precej raznoliko, saj se je od izida prvih priredb zvrstilo več političnih sistemov, spreminjala se je slovenska percepcija izvirne kulture, nenazadnje pa tudi odnos do rasizma. Mogoče je pričakovati, da so se slovenski odzivi občutno razlikovali od tistih v izvirni kulturi, med drugim zaradi tega, ker slovenski narod skozi zgodovino ni imel veliko neposrednih stikov z Afroameričani oz. temnopoltimi nasploh. Poleg tega se je množično slovensko izseljevanje v ZDA pričelo šele nekaj desetletij po odpravi suženjstva (Drnovšek, 2013, 74), torej so bile tudi izkušnje slovenskih izseljencev oz. zdomcev s *Kočo strica Toma* v obdobju, ko je bila ta na vrhuncu priljubljenosti in je imela največji vpliv na bralstvo, precej omejene.

Preden bomo na podlagi diskurzivne analize obravnavali slovensko recepcijo romana, bomo na kratko predstavili odzive na *Kočo strica Toma* v Združenih državah, s čimer bomo vzpostavili referenčni okvir. Korpus za empirični del raziskave je bil sestavljen s pomočjo navedb v kartoteki avtorjev, ki je dostopna na Inštitutu za slovensko literaturo in literarne vede ZRC SAZU, portala Digitalna knjižnica Slovenije, iskalnika Google ter informacijskega sistema COBISS. V okviru raziskave je bilo pregledanih 942 zapisov v slovenskem periodičnem tisku in na spletu, v katerih je *Koča strica Toma* obravnavana oz. omenjena.[2]

ZGODOVINSKI PREGLED RECEPCIJE *KOČE STRICA TOMA* V IZVIRNI KULTURI

V 175-letni zgodovini od prvotne objave v periodičnem tisku je *Koča strica Toma* v ZDA doživela številne vzpone in padce tako v priljubljenosti med širšim bralstvom kot tudi v kritiškem vrednotenju (Parfait, 2007, 1, 4). Sprva je zgodba v letih 1851 in 1852 v nadaljevanjih izhajala v abolicionistični reviji *National Era*, takoj po izidu v knjižni obliki pa je postala velika založniška uspešnica z več kot 300.000 prodanimi izvodi v ZDA zgolj v prvem letu (Bloom, 2008, 7, 14–15), za kar je bil deloma zaslužen tudi založnik John P. Jewett z izjemnim smislom za trženje (Parfait, 2007, 59–60, 69, 196; Frick, 2012, 4).

V severnih zveznih državah je *Koča strica Toma* na pozitiven odziv naletela zlasti med abolicionisti, ki so odobravali vpliv tega romana na javno mnenje – prikaz brutalnosti suženjstva se je namreč dotaknil številnih ljudi (Weinstein, 2004a, 3; Pryse,

1 Primerjava teh dveh priredb je razkrila, da sta nastali na podlagi istega nemškega besedila, ki pa ga kljub prizadevanjem ni bilo mogoče identificirati.

2 14 izmed 82 člankov, ki so obravnavani v empiričnem delu te razprave, je avtor vključil že v širše zastavljen članek o recepciji prevodov v luči ideologije rasizma (cf. Trupej, 2015).

2004, 134; Crane, 2004, 158–160; Walters, 2004, 176, 184–185, 188; Bloom, 2008, 15). Široko občinstvo je zgodba dosegla tudi zaradi številnih dramatizacij romana (Frick, 2012, 29–106). Nekateri so sicer izpostavili pomanjkljivosti v pripovedni tehniki (Parfait, 2007, 30), *Koči strica Toma* so očitali sentimentalnost (Frick, 2012, 10–12) ali pa trdili, da sužnjelastniški sistem prikazuje v pretirano negativni luči (Gossett, 2008, 54; Crane, 2004, 156). Že ob izvirnem izidu so predvsem nekateri abolicionisti in vplivni predstavniki afroameriške skupnosti roman kritizirali tudi zaradi stereotipne karakterizacije afroameriških pripovednih oseb in/ali zagovarjanja vrnitve Afroameričanov v Afriko namesto njihove polnopravne integracije v ameriško družbo (Levine, 2008, 57–58; Weinstein, 2004a, 3–4; Robbins, 2007, 20–21, 40–42, 105–107; Ammons, 2008, 62).

V južnih zveznih državah je bila recepcija *Koče strica Toma* izrazito negativna. V odzivih so bili predvsem pogosti očitki, da je Harriet Beecher Stowe suženjstvo prikazala na izkrivljen način (Weinstein, 2004a, 3; 2004b, 39–57; Jordan-Lake, 2005, xv–xvi; Parfait, 2007, 94–96; Robbins, 2007, 100–101; Frick, 2012, 5). *Koča strica Toma* je posledično spodbudila tudi nastanek številnih književnih del (t. i. anti-Tom literature), v katerih je bil sužnjelastniški sistem upodobljen kot povsem benigna oz. celó dobrohotna institucija (Brown, 2004, 78; Jordan-Lake, 2005, 1–125; Robbins, 2007, 101–104; Bloom, 2008, 16).

Po začetnem komercialnem uspehu *Koče strica Toma* so prodajne številke sicer kmalu občutno upadle, toda tudi v naslednjih desetletjih zanimanje za roman med bralstvom ni povsem zamrlo, literarna srenja pa ga je prištevala med najtehtnejša ameriška književna dela (Parfait, 2007, 6, 100–104, 120–122, 127–128, 134, 136, 138). Proti koncu 19. stoletja je bilo to besedilo zopet prodajna uspešnica – leta 1892 je bilo npr. prodanih kar 180.000 izvodov knjige (Parfait, 2007, 144). Tudi na prelomu stoletja in v prvih desetletjih 20. stoletja je bila *Koča strica Toma* še vedno priljubljena med širšim bralstvom in je uživala razmeroma visok status v literarnem kanonu (Parfait, 2007, 150, 153, 162, 175). Literarni teoretiki so denimo razpravljali o vlogi tega besedila pri oblikovanju kolektivnega spomina ameriške družbe na sužnjelastniško obdobje (Parfait, 2007, 151–152, 156–160; cf. Gossett, 2008, 54–55).

Okvirno od 30. do 60. let prejšnjega stoletja je bila *Koča strica Toma* deležna manj zanimanja, kar je med drugim razvidno iz dejstva, da je v tem obdobju v ZDA izšlo občutno manj novih izdaj kakor v prejšnjih desetletjih (Parfait, 2007, 177). Poleg tega je iz kritiških zapisov očitno, da je to književno delo v omenjenem obdobju zavzemalo zgolj še obrobno mesto v ameriškem literarnem sistemu – priznavali so mu predvsem zgodovinsko pomembnost (Robbins, 2007, 117; Parfait, 2007, 177–184). Tudi afroameriški intelektualci so prevpraševali vrednost romana; medtem ko so nekateri, npr. Langston Hughes (Parfait, 2007, 179, 182), izpostavili njegovo pomembno vlogo pri spodbujanju abolicionističnega razpoloženja v družbi, so drugi, npr. James Baldwin, pisateljici očitali določene rasistične tendence (Warren, 2004, 223–225; Parfait, 2007, 182–183; Robbins, 2007, 112, 119–120; Bloom, 2008, 17–18). Deloma je negativne odzive na roman v tistem obdobju sicer mogoče pripisati nekaterim gledališkim in filmskim različicam *Koče strica Toma*, ki so temeljile na minstrelskih predstavah[3] in so v marsikaterem oziru utrjevale negativne stereotipe o Afroameričanih oz. izkrivljale pisateljičino izvirno protisuženjsko sporočilo (Weinstein, 2004a, 4; Parfait, 2007, 183; Bloom, 2008, 16; Frick, 2012, 18; cf. Asim, 2007, 72–74).

Intenzivirano afroameriško gibanje za državljanske pravice sredi 20. stoletja je privedlo tudi do še pogostejših polemik o *Koči strica Toma* v afroameriških intelektualnih krogih; nekateri so romanu sicer priznavali vpliv na zgodovinsko dogajanje, toda bolj pogosto so bili do njega kritični zaradi utrjevanja stereotipov o temnopoltih (Gossett, 2008, 55–56; Warren, 2004, 226). V tem obdobju se je tudi izraz »stric Tom« začel pogosteje uporabljati kot žaljivka, s katero je afroameriška skupnost označevala nekoga iz lastnih vrst, ki je bil preveč servilen do belcev (Parfait, 2007, 190; cf. Newman, 2004, 114–116; Otter, 2004, 17; Weinstein, 2004a, 3; Robbins, 2007, 112; Bloom, 2008, 18–19).

Od 60. let prejšnjega stoletja dalje je povečano zanimanje za *Kočo strica Toma* opaziti v strokovnih oz. akademskih krogih, denimo v okviru feminističnih in postkolonialnih ved, ki so ponudile nekatere nove poglede na to književno delo (Weinstein, 2004a, 4–8; Pryse, 2004, 144; Warren, 2004, 220–221, 226–227; Parfait, 2007, 184–195; Robbins, 2007, vii, 117–121; Bloom, 2008, 18–19). V zadnjih nekaj desetletjih literarni teoretiki nadaljujejo s pretresanjem različnih vidikov romana – tako progresivnih kot tudi potencialno problematičnih[4] (Karcher, 2004, 211; Otter, 2004, 19–20; Thompson, 2014, 61–63; West, 2014, 43; Parfait, 2007, 195–201; Robbins, 2007, 35–39, 43–57, 121–123; Ammons, 2008, 61–64). Torej lahko zaključimo, da *Koča strica Toma* v izvirni kulturi ostaja relevantna tudi v 21. stoletju.

3 Pri tej obliki gledaliških predstav v 19. stoletju so temnopolte like igrali belci; obraze so imeli pobarvane s črno barvo in temnopolte so upodabljali na stereotipen način.

4 Pogosto je denimo izpostavljeno, da je Harriet Beecher Stowe kot bolj karakterno kompleksne prikazala tiste afroameriške pripovedne osebe, ki so mešanega porekla, tj. imajo tudi bele prednike (Pryse, 2004, 134; Walters, 2004, 181; cf. Parfait, 2007, 83–84; Robbins, 2007, 43–44; Frick, 2012, 12).



Slika 1: Harriet Beecher Stowe, 1872 (Vir: Wikimedia Commons).

SLOVENSKA RECEPCIJA

Obdobje habsburškega cesarstva

Prvi dve slovenski priredbi romana sta bili nekaj pozornosti deležni tako ob izidu kot tudi v poznejših desetletjih. Kratek prispevek o Božičevi priredbi je bil denimo objavljen v tedniku *Slovenska bčela*, manj kot teden dni pozneje pa je bilo isto besedilo priobčeno še v publikaciji *Šolski prijatel*; v anonimnem zapisu je med drugim navedeno, da je izšla »dolgo pričakovana in že skorej v vse evropejske jezike prestavljena povest o prenesrečnem življenji vbogih zamorcov v svobodnih deželah Amerike. Milo se človeku stori, slišati, kaj ti revčiki terpeti morajo« (N. N., 1853a, 184; 1853b, 190). V *Oglasniku*, prilogi časnika *Kmetijske in rokodelske novice*, je bil objavljen oglasni zapis o izidu Malavašičeve priredbe, ki je označena kot izjemno uspešno »delo časa, ktero govori od robstva ali sužnosti v strinjenih amerikanskih deržavah, in jasno dokazuje, da je zoper človeštvo, da je torej čas, to nečloveško napravo odpraviti« (N. N., 1853c, 38). V katoliškem časopisu *Zgodnja Danica* je Josip Levičnik pri pregledu dogodkov na Slovenskem poročal, da je izšla Božičeva priredba romana, in jo z naslednjimi besedami priporočil bralstvu: »Gotovo bo sleherniga mikalo zvediti žalostni stan vsakterih sužnjev, kako jih kupujejo in prodajajo, lovijo in grozovitno mučijo, in kako ti reveži nar hujši terpljenje voljno prenašajo« (Levičnik, 1853, 123). Več kot dve desetletji pozneje so v stanovskem glasilu *Učiteljski tovariš* v rubriko s priporočili knjig za šolske knjižnice vključili tudi Božičevo priredbo. Čeprav je bilo leta 1865 suženjstvo v ZDA odpravljeno, je knjiga predstavljena na naslednji način:

> *Ker nam je do tega, da se naša mladina soznani tudi z inostranimi prebivalci in še posebno, da dobode pojem o onej krutej sužnosti ali robovanju, v katerem še dandenes živi toliko nesrečnih ljudi v zedinjenih državah severne Amerike; a v tej knjigi je z živimi barvami naslikano pomilovanja vredno stanje sužnih zamorcev v vseh razlikah njihovega življenja, njih ljubezen in udanost do svojih; potem tudi, kako je kupujejo in prodajajo, lovijo in grozovito terpinčijo.* (N. N., 1876, 138)

Tudi v naslednjih desetletjih je v slovenskem periodičnem tisku zaslediti nekaj omembe vrednih zapisov o *Koči strica Toma*. V *Ljubljanskem listu* je bila denimo omenjena v negativnem kontekstu – Harriet Beecher Stowe je bila očitana pretirana sentimentalnost (N. N., 1885, 1). Izdaja posodobljene različice Malavašičeve priredbe ni ostala povsem prezrta; o njej so poročali v reviji *Dom in svet*, kjer je navedeno, da je roman primeren predvsem za mladino, ki naj bi se iz njega naučila »milosrčnosti do bližnjega« (N. N., 1888, 46). V reviji *Ljubljanski zvon* pa je bila objavljena recenzija, v kateri se Anton Trstenjak (1889, 754–761) ne opredeli glede vsebine, temveč novo izdajo obravnava izključno z jezikoslovnega vidika – zaradi številnih pomanjkljivosti jo oceni kot neustrezno. V konservativnem časniku *Slovenec* je bilo v kratkem prispevku navedeno, da naj bi *Koča strica Toma* pripomogla k osvoboditvi sužnjev v Braziliji (N. N., 1890, 4), medtem ko je bila v liberalnem časniku *Slovenski narod* izražena skeptičnost glede umetniške vrednosti romana: »Dasi ni povest nikak umotvor, se je vender toli priljubila srednjemu in nižjemu občinstvu, da je izšlo doslej že 121 izdaj v več kakor 300.000 iztisih« (N. N., 1897, 3). Posodobljena Ma-

lavašičeva priredba je bila v reviji *Slovenski učitelj* vključena v katalog priporočenih knjig za učence ljudskih šol; v tej katoliško usmerjeni publikaciji protagonista opišejo kot »plemenitega človeka, ki je ljub Bogu in poštenim ljudem vsled čednosti, katere si utrjuje izpolnjujoč krščanske zapovedi: v verigah je uklenjen, a volje njegove nihče ne more ukleniti« (N. N., 1907, 62). Na koncu anonimnega zapisa je sicer pripomnjeno, da je zgodba nekoliko preveč zapletena za otroke in da je iz pripovedi razvidno, da pisateljica ni bila katoličanka (N. N., 1907, 62).

Obdobje med obema vojnama

Košutnikova priredba, ki je izšla v letu, ko je razpadla Avstro-Ogrska, nato pa je bila leta 1932 ponatisnjena, je ostala kritiško neopažena. Prvi omembe vreden zapis o *Koči strica Toma* v tem obdobju zasledimo šele ob 75. obletnici izida izvirnika; v časniku *Jutro* je predstavljeno, kako uspešen in vpliven je bil ta roman v ZDA (N. N., 1927, 6). Leto za tem je bil v časniku *Mariborski večernik »Jutra«* priobčen razmeroma obširen članek o knjigi; začne se s trditvijo, da je to delo »otvorilo težak a zmagoviti boj proti strašni krivici – proti suženjstvu milijonskega zamorskega plemena« (N. N., 1928, 4). Nadalje je navedeno, da je bil roman do nedavnega sodobnemu širšemu občinstvu dokaj nepoznan, vendar je istoimenski film zopet vzbudil zanimanje zanj. Sledi oris ozadja nastajanja romana in njegovega uspeha oz. vpliva na družbo, nato pa se prispevek zaključi z naslednjimi besedami: »Suženjske verige so padle, samo nazadnjaštvo še vzdržuje nekaj predsodkov proti zamorcem in ko se tudi potomci nesrečnega sužnja strica Toma udejstvujejo z velikimi uspehi na polju umetnosti in znanosti, je do konca človeštva zagotovljen časten spomin pisateljici in dobrotnici Beechev-Stowe [sic]« (N. N., 1928, 4). Naslednje leto je bil tako v *Jutru* kot v *Mariborskem večerniku »Jutra«* objavljen domala identičen prispevek o zgoraj omenjenem filmu iz leta 1927; njegova literarna predloga je označena kot »zgodovinsko kulturni dokument na žalostnejšega [sic] poglavja človeške družbe« (N. N., 1929a, 2; 1929b, 5).

Ob izidu priredbe Olge Grahor je v anonimnem zapisu v *Jutru* navedeno, da je pisateljica z opisom drastičnega položaja temnopoltih v južnih zveznih državah pripomogla k odpravi suženjskega sistema v ZDA in da njen roman zato velja za edino klasično književno delo o suženjstvu. Nadalje je v članku izraženo odobravanje nad tem, da so bila izbrana poglavja dosledno prevedena ter da je knjiga opremljena z avtoričinim življenjepisom in pregledom zadevnega zgodovinskega obdobja (N. N., 1934a, 4). Izjemno pozitivna ocena romana je bila podana tudi v časniku *Trgovski list*:

> *Ta lepa knjižica marljive založbe tiskarne Merkur zasluži posebno pozornost vsakogar, ki se zanima za zgodovino Amerike in še posebej za veliki problem suženjstva, ki je pomenilo še do našega stoletja veliko zapreko v gospodarskem razvoju sveta. Roman »Koča strica Toma« je postal slaven prav zaradi tega, ker je edina velika in realistična povest iz bojev proti suženjstvu. Pisateljica Beecher-Stowe prikazuje življenje zamorcev in značilna razmerja med njimi in belimi gospodarji, dotika se političnega spora med jugom in severom, opisuje vplive krščanstva in vplive napredujoče civilizacije, ki je nujno terjala odpravo suženjstva. Vendar so različni ljudje še živeli od suženjstva in je bilo to še dalje dobičkarska trgovina. Značaji oseb ob starem Tomu se prepletajo v živih barvah in usodah. Nekateri prizori so mojstrsko naslikani, tako posebno trgovina s sužnji, beg v Kanado in delo na farmi. Borbenost tega dela je še danes sveža in aktualna.* (N. N., 1934b, 6)

Vera Dostalova (1935, 186) je v reviji *Ženski svet* pri pregledu na novo izdanih književnih del, ki so primerna za šolsko mladino, navedla tudi novo priredbo *Koče strica Toma*, ki jo je označila za mladinsko povest. Zaradi slednje trditve je Olga Grahor uredništvu poslala dopis s prošnjo za popravek, ki je bil objavljen v naslednji številki revije:

> *»Koča strica Toma«,* [sic] *ni mladinska povest, kakor piše vaša poročevalka, temveč je socialna slika življenja sužnjev v Združenih državah v sredini prošlega stoletja. Namen knjige je bil, da bi zbudila zanimanje ameriških mož in žena za to vprašanje in jih navdušila za odpravo suženjstva, s tem da opozarja ne le na zlorabe suženjstva, temveč predvsem na zlo, ki je bistvo suženjskega sistema. Vse to sem se trudila dokazati že v svojem uvodu (v katerem se ne bavim toliko z delom pisateljice kakor z zgodovino suženjstva in borbe proti njemu v Združenih državah), razen tega mora to biti jasno vsakemu, ki je prebral pisateljičin lastni uvod knjige, ki sem ga nalašč zato sprejela v izbor, da bi izpodbila pri nas tako razširjeno napačno mnenje, da je »Koča strica Toma« mladinsko delo. Ta oznaka je popolnoma nepravilna in ni pravična socialno in etično važnemu, pogumnemu delu velike žene.* (Grahor, 1935, 215)

Pomemben vpliv, ki ga je *Koča strica Toma* imela na družbo, je omenjen tudi v posameznih drugih zapisih iz tega obdobja (N. N., 1930, 18; 1941, 2; Kalan, 1933, 216), v katerih pa stališča glede estetske kakovosti tega literarnega dela sicer niso izražena.

Socialistično obdobje

Po drugi svetovni vojni je bila *Koča strica Toma* precejšnje pozornosti deležna že nekaj let pred izidom nove priredbe tega romana. Vasja Ocvirk je v prispevku z naslovom »Ameriška književnost in črnci« v *Gledališkem listu SNG Drama* npr. zapisal naslednje:

> *Pred več kot sto leti je izšla znamenita knjiga ameriške pisateljice Beecher Stowe »Koča strica Toma«. Ta ep o črnem proletariatu v ZDA si je kmalu pridobil svetovni sloves. Pisateljica, strastna abolicionistka, si je želela s tem romanom pridobiti ljudi za boj proti suženjstvu s tem, da jim pokaže suženjstvo tako živo in dramatično, da se bodo bralci ozrli okrog sebe in ga opazili tudi v svoji neposredni bližini. To ji je tudi delno uspelo, saj je roman, ki je bil preveden na* [sic] *23 jezikov, zelo vplival na abolicionistično gibanje.* (Ocvirk, 1948, 89)

Podobno pozitivno je roman ovrednotil tudi Bogomil Fatur, ki je v literarni reviji *Novi svet* zapisal, da je bila Beecher Stowe:

> *prva pisateljica Amerike, ki je odkrila črnski element in obtožila moderno suženjstvo. Koča strica Toma (Uncle Tom's Cabin), delo, ki ga vsakdo pozna, je po pravici doseglo internacionalno veljavo, zakaj bil je to prvi učinkoviti napad na sramotne rasne razmere v južnih predelih Združenih držav. Čeprav je osnovni ton te knjige poučen in sentimentalen, saj ima vrhunec v prizoru, ko črnega trpina Toma do smrti izbičajo, njenega zmagovitega pomena to dejstvo ne more zasenčiti.* (Fatur, 1951, 648)

Tudi ob stoti obletnici izida izvirnika je bilo v slovenski periodiki objavljenih več omembe vrednih zapisov. V *Slovenskem poročevalcu* denimo zasledimo članek o zgodovini ameriškega sužnjelastniškega sistema in o nehumanem ravnanju s sužnji, ki je pisateljico naposled spodbudilo k pisanju *Koče strica Toma*; glede vpliva te knjige je navedeno, da »je vzburkala val ogorčenja po vsem svetu in prav gotovo je pripomogla k odpravi suženjstva črncev več kot pa vsa zasedanja voditeljev raznih dežel« (N. N., 1952a, 3). V *Delavski enotnosti* je bila objavljena serija člankov o položaju Afroameričanov za časa suženjstva; prvi izmed njih uvodoma opiše nastanek *Koče strica Toma* ter njen komercialni uspeh oz. vpliv. Odstavek o tem romanu se zaključi z naslednjimi besedami: »Milijoni ljudi po vsem svetu so sočustvovali z ubogimi Zamorci [sic] in stiskali pesti zoper lastnike sužnjev. Pretresljivo slikanje trpljenja teh sužnjev je postalo plamteča obtožba zoper ustanovo suženjstva sploh. Šibka žena je s svojim peresom podnetila veliko bitko v boju za človečanstvo in pravičnost« (Winkler, 1952, 5). V *Vestniku* so omenili pomembno vlogo *Koče strica Toma* v boju proti suženjstvu oz. rasni diskriminaciji ter se zavzeli za to, da bi to delo čim prej zopet izšlo tudi v slovenščini (N. N., 1952b, 2). Kratek prispevek v štirinajstdnevniku *Naši razgledi* je prav tako osredotočen na vpliv, ki ga je ta roman imel na ameriško družbo (N. N., 1952c, 23). V celovškem časniku *Slovenski vestnik* je Anton Ziljan priobčil dokaj obširen članek o zadevnem književnem delu, v katerem je opisal ozadje njegovega nastanka in objave v izvirni kulturi, na kratko podal fabulo in navedel vse dotlej objavljene slovenske priredbe. Opredelil se je tudi glede estetske vrednosti zgodbe:

> *Roman sam na sebi ni velika umetnina. Je pomemben bolj kot v poezijo skrita borbena tendenčna knjiga svetovne literature zoper suženjstvo, ki je takrat še vedno obstajalo v južnih državah Amerike*[.] […] *Knjiga je bila najpomembnejši literarni napad na suženjstvo v južnih državah. V podrobnostih pretiran, brez velike umetniške vrednosti, neresničen na številnih mestih, neumetniška gradnja, tudi ne jezikovna umetnina, vseeno je bil vpliv knjige po njej propagiranega humanizma ogromen.* […] *Danes je literarno zanimanje za knjigo skoraj ugaslo, četudi je ob izidu knjige tako razburkala javno mnenje v Ameriki.* (Ziljan, 1952, 6)

Koča strica Toma je bila precejšnje pozornosti deležna leta 1954, ko je bila objavljena nova priredba. Še pred izidom je bil roman omenjen v tržaškem tedniku *Demokracija* – v članku o položaju Afroameričanov skozi zgodovino je ovrednoten z naslednjimi besedami: »Zgodba je gotovo pretirana in tendenciozna. V njej prevladujejo skrajnosti, vendar prihaja do izraza etično načelo pravičnosti in krik proti narodnostni nestrpnosti« (N. N., 1954a, 3). V *Primorskem dnevniku* pa denimo zasledimo mnenje, da je zgodba še vedno relevantna, zaradi česar je izraženo odobravanje nad objavo nove priredbe. Na kratko je orisan tudi položaj Afroameričanov sredi 19. stoletja, ki je avtorico napeljal k pisanju romana (N. N., 1954b, 4). V recenziji v *Slovenskem poročevalcu* je vsebina zgodbe umeščena v zgodovinski kontekst, pojasnjeno je ozadje nastajanja romana, pa tudi njegov pomen v boju proti zatiranju Afroameričanov. Naposled so izražene naslednje sklepne misli:

> *Ta pomembna knjiga je nastala iz globokega razumevanja črnskega trpljenja, njihovega hrepenenja po dobroti in svobodi in iz brezmejnega odpora do nečloveškega ravnanja s črnci, v katerih gleda pisateljica Beecher-Stowe ljudi, ki imajo enake pravice do življenja kot vsak belec. Čeprav je knjiga napisana ponekod dokaj naivno, sentimentalno in je v njej čutiti še precej romantičnosti posebno v načinu pripovedovanja, pa se bralec*

vsekakor močno zaveda, da je vse to podoba krute resničnosti, podoba resnične družbe. (J. J., 1954, 6)

Tudi v recenziji, ki je bila objavljena v literarni reviji *Knjiga*, je navedeno, da gre za sentimentalen roman, v katerem so nekatere pripovedne osebe idealizirane, vendar je zgodba »napisana z globoko občuteno, strastno željo po pravičnosti, ki ni mogla ostati brez učinka« (N. N., 1954c, 424).[5] V naslednji številki *Knjige* pa zasledimo določeno mero etnocentrizma, saj naj bi roman prikazoval »slik[o] grozot, ki so jih morali pretrpeti sicer primitivni, vendar nadarjeni, sposobni in po naravi dobri črnci« (Širok, 1954, 462). V nadaljevanju prispevka zasledimo trditev, da je pisateljica s *Kočo strica Toma* obtožila tako cerkvene oblasti kot tudi širšo družbo ter da je z njim pomembno vplivala na javno mnenje; Širok pripomni tudi, Afroameričani še vedno niso enakopravni (Širok, 1954, 462–463). Meta Sever – ki pisateljici sicer ne pripisuje izjemnega pisateljskega talenta, temveč bolj ceni njeno človečnost – v recenziji v reviji *Naša žena* prav tako opozori na sodobno neenakopravnost temnopoltih v ZDA in med drugim zapiše, da je Beecher Stowe »pokazala človeštvu, da so črnci tudi ljudje, ljudje, ki jih od ostalega človeštva ne loči nič drugega kakor barva« (Sever, 1954, 242). V časniku *Ljudska pravica* pa lahko preberemo, da roman temelji na resničnih dogodkih – čeprav je pisan v sentimentalnem slogu tistega časa – in da je imel pomembno vlogo pri preobrazbi družbe. Podana je naslednja sklepna misel: »Knjiga je napisana s strastno željo po pravičnosti in človečnosti do zatiranih in zaradi vseh teh prvin, ki jih vsebuje to delo, ni to samo klasično delo ameriške književnosti, temveč občečloveški dokument, ki bi ga moral poznati vsak« (P. B., 1954, 5).

Tudi tekom približno desetletja po izidu nove priredbe je bil zadevni roman razmeroma pogosto obravnavan oz. omenjen v slovenskem periodičnem tisku. Prispevek v reviji *Tovariš*, ki na kratko predstavi zgodovino suženjstva in nastajanje *Koče strica Toma*, se denimo zaključi z naslednjo izjavo: »V tem klasičnem delu ameriške književnosti je toliko upora proti izkoriščanju človeka po človeku, da je še danes ohranil svojo pomembnost kot dokument boja za pravice človeka onstran Atlantskega oceana« (Č. Š., 1955, 10). Nekaj mesecev pozneje je bil v isti reviji objavljen portret Harriet Beecher Stowe, v katerem so poleg njene življenjske zgodbe dokaj podrobno opisane družbene razmere, ki so pisateljico navdihnile k pisanju, glede njenega najpomembnejšega romana in njegovega vpliva pa je podano naslednje mnenje:

Knjiga je bila sicer pisana v slogu sentimentalnih romanov, vendar predstavlja prvi realistični roman v ameriški književnosti. Pisateljica ni bežala pred resničnostjo, temveč se je otresla vseh predsodkov in odločila za boj proti madežu človeštva. […] *Pisateljica je z vso globoko občutenostjo, s strastno željo po pravičnosti opisala tragiko črnih sužnjev. Taka knjiga ni mogla ostati brez odmeva. Imela je velikanski vpliv, saj so bile v nji opisane vse krvave zgodbe s trgov črnskih sužnjev.* […] *Pisateljica je spoznala tudi zatiranje delavskih množic v Evropi in napovedovala socialno revolucijo. Odločno se je uprla slehernemu izkoriščanju človeka po človeku. V tem je njena knjiga še danes občečloveški dokument.* (N. N., 1955b, 326)

V *Celjskem tedniku* je bila *Koča strica Toma* navedena med najbolj branimi knjigami vseh časov, v zvezi s tem literarnim delom pa zasledimo tudi trditev, da »[p]esniškoslovniška vrednost tega romana ni ravno na vrhuncu, toda roman je pisan z občutkom« (P. M., 1955, 16). V *Delavski enotnosti* je v recenziji zbirke *Otroci strica Toma* izpod peresa Richarda Wrighta uvodoma omenjena *Koča strica Toma*, glede katere lahko med drugim preberemo naslednje: »Ta z ljubeznijo in takrat tudi s pogumom pisana knjiga je prodrla zelo hitro po vsem svetu in povsod dvignila ogorčenje nad strahotami in nečloveškimi krivicami, ki jih je prikazala. Bila je to prva in dolgo edina knjiga, ki ji je bilo jedro in cilj črnski problem Amerike« (N. N., 1956, 7). O zadevnem romanu je bilo govora tudi v prispevku o zgodovini Ku Klux Klana v reviji *Tovariš* – izraženo mnenje je precej omalovažujoče: »V severni državi Massachusetts je začela neka skromna pastorjeva hčerka Harriet Beecher-Stowe pisati po Rousseaujevem receptu o črncih, čeprav še nikoli ni videla zamorca. Iz tega je nastal roman *Koča strica Toma*, ki je prav tako pretresljiv, kakor je nepristen« (N. N., 1957, 387). Stanka Godnič (1959, 5) je ob novi izdaji povojne priredbe *Koče strica Toma* v *Delu* zapisala, da gre sicer za sentimentalen, a kljub temu pomemben roman, ki je ameriško javnost opozoril na grozote suženjstva, pripomnila pa je tudi, da so temnopolti marsikje po svetu še vedno v neenakopravnem položaju. O tej novi izdaji je poročal tudi tednik *Slovenski Jadran*, v katerem lahko preberemo, da je priredba:

ohranila zgodbo v originalnem pisateljičinem načinu pripovedovanja, prav tako pa njeno osnovno misel in hotenje: ljudje vseh barv in narodnosti so enakovredni in morajo biti polnovredni člani človeške skupnosti. Zgodba se dogaja v ZDA v 19. stoletju, ko je vladal še zakon o suženjstvu. Vemo, da je pozneje državljanska vojna med Severom in Jugom prinesla črnim sužnjem svobodo, toda zdi se, da korenine sramotnih suženjskih odnosov še niso povsem izumrle, sicer ne bi vedno znova slišali o rasni diskriminaciji, ko temnopoltim ljudem odrekajo enake pravice in uveljavitev po

5 V nekoliko skrajšani obliki je bil ta članek v isti reviji objavljen še enkrat (N. N., 1955a, 403–405).

osebnih sposobnostih, kot jih imajo belci. Zato toplo in človekoljubno napisana knjiga »Koča strica Toma« še danes ni izgubila aktualnosti in ni zgolj napeto in privlačno zgodovinsko branje. (N. N., 1959, 5)

V *Naših razgledih* je Mirko Jurak *Kočo strica Toma* obravnaval s prevodoslovnega vidika: v članku na kratko ovrednoti vse slovenske različice romana, pri čemer denimo izpostavi, da ima v prvih dveh priredbah krščanski vidik zgodbe pomembno vlogo. Košutnikovo priredbo opiše kot manj dinamično, medtem ko pozitivno ovrednoti prevaljsko delo Olge Grahor; priredbo iz leta 1954 oceni kot najboljšo. O umetniški vrednosti obravnavanega dela pa poda naslednjo oceno:

Literarni kritiki so seveda našli v romanu več kamnov spotike, ki delu manjšajo umetniško vrednost. Očitali so pisateljici preveliko tendencioznost, ki naj bi povzročila, da je bila pisateljica le preveč kronist raznih dogodkov, ne da jih [sic] *umetniško predelala. Res je, da v nekaterih likih lahko zasledimo precej črno-belo slikanje človeških značajev (Legree, Marie, Tom), jezik nekaterih oseb je izumetničen (mala Ema* [sic]*), zgodba je sentimentalna. Toda te slabosti je premagala pisateljica z velikim čutom za humanizem, ki se odraža v vsem delu, in z optimizmom, ki da* [sic] *bralca močno prevzameta in ga plemenitita. Te pozitivne lastnosti povzdignejo pretresljive zgodbe zatiranih črncev na višino, ki ima globoko etično osnovo. Z njo pa se odpirajo romanu poti do širokega kroga bralcev, roman je postal klasično delo mladinske literature in zato bi ga le-tej še posebej priporočili.* (Jurak, 1960, 118)

V recenziji, ki je bila objavljena v reviji *Mlada pota*, je izraženo dokaj kritično mnenje glede avtoričinih pisateljskih sposobnosti; roman je označen kot sentimentalen in romantičen ter brez velike estetske vrednosti (R. R., 1960, 102–103). Recenzent oz. recenzentka kljub temu ocenjuje, da gre za tehtno delo, in na kratko predstavi vlogo, ki jo je *Koča strica Toma* imela pri boju zoper suženjstvo. Glede slovenske priredbe pa zapiše naslednje:

V neokrnjenem obsegu je roman nekajkrat obsežnejši, vendar se je izkazalo, da si z vsem tistim, kar otežuje fabulo, ni mogoče kaj prida pomagati. Ker je zanimiv mnogo bolj po svojem zgodovinskem pomenu kot zaradi estetskih vrednot, je prav, da ga posredujemo predvsem v zgoščenem fabulativnem prikazu. To je slovenska izdaja storila: nakazala je vse značilnosti izvirnika, dala slutiti njegov življenjski pomen v konkretnih okoliščinah ameriške stvarnosti pred državljansko vojno, skušala ohraniti čustveni ton pripovedi in starinski jezik, pa vendarle sežetost opisov, pisateljičino obračanje k bralcem, njene esejistične vložke in kar je še podobnih značilnosti. (R. R., 1960, 103)

Istega leta je bil v reviji *Obzornik* objavljen prevod obsežnega članka, v katerem M. L. Rizzatti (1961, 244–249) obravnava tako zgodovinsko ozadje boja proti suženjstvu v ZDA in pisateljičin proces pisanja romana kot tudi kritiške odzive nanj in njegov vpliv na razvoj dogodkov, ki so privedli do državljanske vojne. Avtorica med drugim ponudi razlago, zakaj je to delo naletelo na odmev med širšimi množicami po svetu: »Ljudje, ki niso prav ničesar vedeli o vprašanju črnskega suženjstva, so sprejeli strica Toma kot človeka iz svojih vrst, brali so v zgodbi o njegovem težkem življenju kot o svojih težavah, svojem trpljenju in svojih upih. Zatirani črnec je postal simbol zatiranega človeka ne glede na barvo kože, narodnost in domovino« (Rizzatti, 1961, 248). Ob 150. obletnici pisateljičinega rojstva so jo na podoben način predstavili tudi v obširnem prispevku v *Književnem glasniku Mohorjeve družbe*, kjer je *Koča strica Toma* uvrščena »med knjige, ki so imele za napredek in razvoj človečanskih pravic v ameriški zgodovini največji pomen« (J. D., 1961, 34). Ko je Rapa Šuklje v *Naši sodobnosti* obravnavala ustvarjanje Richarda Wrighta, je njegovo zbirko *Otroci strica Toma* primerjala s *Kočo strica Toma*; za slednji roman je navedla, da »prikazuje strahote črnega suženjstva v podobi pobožnega, bogu vdanega črnca. Čas takih ponižnih, pobožnih črncev je minil« (Šuklje, 1961, 354). S slednjo trditvijo izrazi kritiko Tomove pasivnosti – neznačilno za slovenske kritike *Koče strica Toma*. Dušica Vukomanović je v *Tedenski tribuni* objavila portret Harriet Beecher Stowe, v katerem je opisala dogodke v njenem življenju, ki so jo spodbudili k pisanju *Koče strica Toma*. Predstavila je tudi odzive na ta roman in njegov vpliv na družbeno dogajanje, zapis pa je zaključila z naslednjimi besedami:

Danes, sto deset let po prvi izdaji »Koče strica Toma« beremo knjigo Harriet Beecher Stowe z občutkom, da je delo še vedno aktualno in potrebno, da je abecednik, ob katerem bi se človeštvo lahko učilo nekaterih preprostih resnic o človeku. V zgodovinah ameriške književnosti najdemo ime pisateljice »Koče strica Toma« med drugovrstnimi pisatelji. Če gledamo delo brez luči njegovega velikega pomena v socialni zgodovini Amerike, mu to mesto vsekakor pripada. Toda plemenite žene, ki je »izzvala vojno«, ne moremo uvrstiti med drugovrstne osebnosti ameriške zgodovine, kajti njeno mesto je med najboljšimi. (Vukomanović, 1962, 14)

Ko je Branko Belan v *Delu* poročal o 4. mednarodnem filmskem festivalu v Moskvi, je omenil tudi nemški film *Koča strica Toma* [*Onkel Toms Hütte*], ki

ga je označil kot reakcionarno delo, in pripomnil, da so literarno predlogo za ta film »progresivni črnci razglasili kot žalitev svoje rase, ker propagira 'ljubezen' med gospodarjem-belcem in služabnikom-črncem« (Belan, 1965, 6).

V četrt stoletja po koncu druge svetovne vojne je v slovenski periodiki zaslediti številne nadaljnje krajše omembe *Koče strica Toma*; v nekaterih zapisih je roman označen kot sentimentalen (Kyovsky, 1953, 89; Kralj, 1954, 938; D. Ž., 1955, 4; Glazer, 1967, 12; Kermavner, 1970, 54), medtem ko je v drugih izpostavljen predvsem vpliv te knjige na družbo (Mendelson, 1948, 4; Ogrin, 1951, 2; Sever, 1956, 210; N. N., 1961, 14; 1963, 10).

V zadnjih dveh desetletjih socialističnega sistema je *Koča strica Toma* v slovenski periodiki prisotna bolj sporadično in omembe vrednih zapisov o njej ni veliko. V enem od nadaljevanj o zgodovini rasizma do Afroameričanov v *Delu* je bilo denimo omenjeno, da je *Koča strica Toma* prispevala k intenziviranju protisuženjskega razpoloženja v severnih državah (N. N., 1979, 6). Tudi ko je 80. letih prejšnjega stoletja v *Delu* nekajkrat obeležena obletnica rojstva H. B. Stowe, je med drugim omenjeno, da so njeni sodobniki *Kočo strica Toma* ovrednotili pozitivno, sodobni kritiški odzivi pa ji niso več tako naklonjeni, saj ji med drugim očitajo rasizem oz. stereotipno prikazovanje Afroameričanov (N. N., 1982, 6; 1984, 12; 1989, 15).

Obdobje samostojne Slovenije

Z ozirom na to, da je v več kot treh desetletjih od slovenske osamosvojitve doslej izšla zgolj ena izdaja *Koče strica Toma*, ne preseneča, da je prisotnost tega romana v sodobni slovenski periodiki večinoma omejena zgolj na krajše omembe; številni avtorji in avtorice navajajo vpliv te knjige na družbeno dogajanje (Grdina, 1992, 71; N. N., 1992, 10; Stanonik, 1996, 123–124; Mazi-Leskovar, 1997a, 45–46; 1997b, 117; Brozina, 1998, 126; Hedžet Tóth, 2012, 21). Sonja Merljak je v *Delu* denimo zapisala, da je *Koča strica Toma* »predrugačila odnos ljudi do črnskega prebivalstva ZDA« (Merljak, 1996, 11).

Darja Mazi-Leskovar (1998) je v znanstveni reviji *Acta Neophilologica* objavila članek o slovenskih priredbah *Koče strica Toma*, nato pa je izsledke predstavila še v reviji *Meta* (Mazi-Leskovar, 2003, 254–260) ter jih vključila v znanstveno monografijo z naslovom *Mladinska proza na tej in oni strani Atlantika* (Mazi-Leskovar, 2011, 71–75, 88–91, 107). Veliko pozornosti je posvetila spremnim besedam: Malavašič in Božič sta denimo v priredbah iz leta 1853 potegnila vzporednice med položajem sužnjev v ZDA in položajem slovenske služinčadi, v spremni besedi k priredbi iz leta 1934 je več pozornosti posvečene orisu zgodovinskih okoliščin v izvirni kulturi, medtem ko v spremni besedi k priredbi iz socialističnega obdobja zasledimo trditev, da naj bi Beecher Stowe prepoznala izkoriščanje delavskega sloja v Evropi in napovedala družbeno revolucijo. Pri primerjavi samih besedil pa je Mazi-Leskovar med drugim predstavila strukturo poglavij v posamezni priredbi in strategijo za prevajanje lastnih imen, pri priredbi iz leta 1954 pa je izpostavila tudi izpuščanje krščanskih elementov. Raziskovalka v omenjenih treh razpravah vsebini oz. umetniški vrednosti samega izvirnika sicer ni posvetila veliko pozornosti, v reviji *Otrok in knjiga* pa je izrazila naslednje mnenje glede literarne vrednosti romana:

> *Pripoved Koča strica Toma je postala največkrat prevedeno ameriško delo 19. stoletja predvsem zato, ker zmore nagovarjati bralce različnih kultur in starosti. Danes se delo zaradi te svoje nadčasovne odlike uvršča med najbolj brano mladinsko prozo v svetovnem merilu. Mlade še vedno pritegne zgodba, ki s svojo karakterizacijo v bralcu spodbuja empatijo do vseh, ki morajo trpeti krivico. Zaradi vzbujanja takih človekoljubnih občutenj in utrjevanja zavesti o pomenu svobode, spoštovanja in kritičnega odnosa do družbe ostaja knjiga aktualna v vseh okoljih, kjer naj bi se mlade vzgajalo v duhu strpnosti in spoštovanja.* (Mazi-Leskovar, 2010, 24)

S slovenskimi priredbami *Koče strica Toma* se je raziskovalno ukvarjala tudi Nike Kocijančič Pokorn (2012, 113–116), ki v znanstveni monografiji z naslovom *Post-socialist Translation Practices: Ideological Struggle in Children's Literature* navaja, da je za priredbo, ki je izšla v socialističnem obdobju, značilno izločanje prvin krščanstva. Janko Trupej pa je – poleg že omenjene raziskave, ki je zajemala tudi nekatere slovenske odzive na *Kočo strica Toma* (Trupej, 2015, 215–218) – v *Primerjalni književnosti* objavil članek o strategijah za prevajanje rasističnega diskurza v slovenskih literarnih prevodih. Ugotovil je, da rasizem v nobeni od priredb *Koče strica Toma*, ki so nastale do socialističnega obdobja, ni bil omiljen, medtem ko so bili v priredbi iz leta 1954 številni rasistični elementi v precejšnji meri (samo)cenzurirani (Trupej, 2014, 94–96).

V zadnjih desetih letih je bil roman deležen tudi nekaterih negativnih omemb; Sebastijan Kopušar (2015, 16) je v *Delu* denimo zapisal, da je *Koča strica Toma* deležna »precejšnjega literarnega posmeha«, medtem ko je Tine Golež (2019) na spletnem portalu *Časnik.si* pripomnil, da gre za »literarno sicer ne najboljši roman 19. stoletja.« Po drugi strani je Ingrid Mager (2020) na spletnem portalu časnika *Dnevnik* ta roman uvrstila med literarne klasike. V *Delu* je bila *Koča strica Toma* obravnavana v članku o mladinskih delih, ki se jim pogosto očita rasizem; med drugim je navedeno, da je roman utrdil nekatere stereotipe o temnopoltih ter da je naslovni lik tudi sam postal stereotip (S. B., 2022, 23).

ZAKLJUČEK

Dinamika recepcije romana *Koča strica Toma* v slovenskem literarnem sistemu se je skozi zgodovino precej spreminjala. V odzivih na prvi dve priredbi iz leta 1853 je bila poudarjena predvsem moralna vrednost tega književnega dela, češ da slovenskemu bralstvu ponazarja nečloveškost suženjstva. V desetletjih po odpravi sužnjelastniškega sistema v ZDA je bila *Koča strica Toma* prav tako nekajkrat priporočena v branje mladini, ki naj bi se iz zgodbe učila sočutja do bližnjega. V nekaterih zapisih so bile sicer izpostavljene tudi pomanjkljivosti romana, denimo njegova pretirana sentimentalnost in zanemarljiva estetska vrednost.

Tretja slovenska priredba iz leta 1918 je ostala kritiško spregledana, je bila pa *Koča strica Toma* nekaj pozornosti deležna ob 75. obletnici izida izvirnika, ko je bila v posameznih člankih izpostavljena pomembna vloga tega romana v boju proti suženjstvu. Priredba Olge Grahor iz leta 1934 je naletela na pozitiven odziv; v kritiških zapisih je bilo med drugim izraženo stališče, da zgodba ostaja aktualna tudi za sodobno bralstvo. Ko so v reviji *Ženski svet* roman označili kot mladinsko literaturo, pa je Grahorjeva v dopisu tej reviji izrazila svoje nestrinjanje; zagovarjala je pomembnost romana in zatrdila, da gre za družbenokritično delo, ki naj bi širše množice prepričalo v nesprejemljivost suženjstva oz. jih spodbudilo k njegovi odpravi.

V slovenskem periodičnem tisku se je o *Koči strica Toma* pogosto pisalo vse od začetka socialističnega obdobja. V povojnih zapisih je bilo izpostavljeno predvsem, da je to literarno delo s svojim moralnim sporočilom pomembno vplivalo na javno mnenje v ZDA in pripomoglo k odpravi suženjstva. Tudi ko je leta 1954 izšla nova priredba, je bila recepcija dokaj živahna; avtorice in avtorji recenzij so orisali zgodovinski pomen *Koče strica Toma* in poudarjali sodobno relevantnost romana – pri bralstvu naj bi spodbujal diskusije o družbeni pravičnosti. Nekateri so sicer tudi v tem obdobju pripomnili, da z estetskega vidika ne gre za vrhunsko literarno delo. Več kot desetletje po izidu te priredbe so bile omembe oz. razprave o *Koči strica Toma* še vedno precej pogoste, pri čemer se izražene vrednostne sodbe niso bistveno razlikovale od poprejšnjih. Čeprav so tudi v zadnjih dveh desetletjih socialističnega sistema izhajali ponatisi, pa je v slovenskem periodičnem tisku zaslediti bistveno manj omembe vrednih zapisov o romanu, kar bi utegnilo nakazovati premik v družbenem vrednostnem sistemu oz. postopno oddaljevanje od vrednot Gibanja neuvrščenih – zlasti v 80. letih prejšnjega stoletja, tj. desetletju pred razpadom SFRJ.

V obdobju samostojne Slovenije je recepcija *Koče strica Toma* pretežno omejena na krajše omembe. Roman je v večini člankov označen kot vplivno literarno delo, ki je pripomoglo k spremembi odnosa javnosti do suženjstva, v posameznih zapisih pa so izpostavljene tudi estetske pomanjkljivosti zgodbe in to, da se romanu očita utrjevanje stereotipov o temnopoltih. V tem obdobju je bila *Koča strica Toma* nekaj pozornosti deležna tudi s prevodoslovnega vidika.

Slovensko *zgodovinsko življenje* obravnavanega romana je bilo v vseh obdobjih občutno manj kontroverzno kot v ZDA, precejšnje razlike pa je zaslediti tudi glede intenzivnosti recepcije. V prvih desetletjih 20. stoletja, ko je imela *Koča strica Toma* v izvirni kulturi razmeroma visok status, ji npr. v slovenskem periodičnem tisku ni bilo namenjene prav veliko pozornosti. Obratno pa se je v slovenskem etničnem prostoru o tem romanu pogosto pisalo konec 40. let in v 50. letih prejšnjega stoletja, torej v obdobju, ko je imel v ZDA zgolj obroben status v literarnem kanonu. Ko se je zanimanje za *Kočo strica Toma* v izvirni kulturi začelo znova povečevati, pa se je v Sloveniji o njej pisalo čedalje manj – podobno velja tudi za sodobno slovensko recepcijo tega romana.

Razloge za občutne razlike med odzivi in intenzivnostjo recepcije *Koče strica Toma* v različnih obdobjih slovenske zgodovine lahko iščemo predvsem v družbeno-politični situaciji. Za socialistično obdobje je bil – vsaj na deklarativni ravni – značilen naklonjen odnos do temnopoltih, kar je med drugim razvidno iz publicističnih zapisov (Trupej, 2014, 91–92), zato ne preseneča, da je bila tudi recepcija zadevnega antirasističnega romana v tistem obdobju veliko bolj živahna kakor dotlej. Status *Koče strica Toma* je do neke mere prav tako razviden iz števila izdaj v nekem obdobju: medtem ko so v skoraj stoletju od prvotnega izida romana do konca druge svetovne vojne različne slovenske priredbe doživele šest izdaj, se je v socialističnem obdobju od sredine 50. let do sredine 80. let zvrstilo kar deset izdaj. Kot namreč navaja Drago Bajt, se v skladu z dominantnimi ideologijami v določenem obdobju oblikuje tudi »kulturna politika, ki vsiljuje določeno vrsto del ali prevajanje idejno vzorne nacionalne književnosti oz. politično zaželenih del ali komercialne literature« (Bajt, 1997, 43). Lawrence Venuti (1998, 67) pa ugotavlja, da se pri prevajanju izločajo prvine, ki ne služijo domačim interesom, niso skladne z normami v ciljni kulturi in bi bralstvo v ciljni kulturi utegnile zmotiti kot tuje. To je veljalo tudi za slovenske priredbe *Koče strica Toma*: pred vzpostavitvijo socialističnega sistema je krščanska vera imela pomembno vlogo v družbi, negativen odnos do temnopoltih in njihov stereotipen prikaz pa ni bil družbeno nesprejemljiv, zato so bile te prvine romana v priredbah ohranjene. Po drugi svetovni vojni pa so socialistične oblasti začele poudarjati druge vrednote, kar se je odražalo tudi v prevajalskih strategijah. Slovenske priredbe *Koče strice Toma*, ki so jih kritiki ocenjevali, so bile torej vedno ustvarjene v skladu s trenutnim *horizontom pričakovanja*.

THE SLOVENIAN RECEPTION OF *UNCLE TOM'S CABIN*

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SUMMARY

The responses to Harriet Beecher Stowe's Uncle Tom's Cabin *in Slovenia have evolved significantly over the years. The first two adaptations, both published in 1853, were initially praised for highlighting the inhumanity of slavery. Even after the slave system was abolished in the United States of America, the novel was sporadically recommended as appropriate reading for young people, although the text's rather limited aesthetic value was pointed out in some articles. The third Slovenian adaptation (1918) was overlooked in the press, whereas Olga Grahor's 1934 adaptation received largely favourable responses.* Uncle Tom's Cabin *was frequently discussed in Slovenian periodicals from the beginning of the socialist era; it was generally praised for its role in the abolition of slavery and for encouraging discussions about social issues even in present times, although in several articles its literary deficiencies were also mentioned. Interest in the novel persisted in the 1960s, but during the last two decades of the Slovenian socialist period, it was no longer discussed in depth and was only mentioned sporadically. In independent Slovenia, the responses to* Uncle Tom's Cabin *have so far been limited to brief mentions – most authors of the articles recognized the novel's historical significance, but only a few acknowledged some of its more problematic aspects. The analysis showed that throughout history, the Slovenian reception of* Uncle Tom's Cabin *has been significantly less intense and controversial than the responses to it in the source culture – the only exception being the late 1940s and the 1950s, when the novel was marginalized in the U.S. literary canon but enjoyed high status in the Slovenian literary system.*

Keywords: Harriet Beecher Stowe, *Uncle Tom's Cabin*, reception, American literature, literary translation, racism

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MLADINA PROTI POZABI: VZPOSTAVLJANJE KULTURE SPOMINJANJA IN DIALOGA MED MLADIMI SLOVENKAMI IN SLOVENCI V AVSTRIJI IN ITALIJI

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IZVLEČEK

Članek na podlagi podatkov, pridobljenih iz medijskih objav, spletnih strani (srednjih šol, kulturnih in izobraževalnih pobud, programov in projektov), lastnih poizvedovanj in znanstvenih razprav omogoča teoretsko podkrepljen vpogled v vzpostavljanje kulture spominjanja in dialoga med mladimi Slovenkami in Slovenci v Avstriji in Italiji. Osredotoča se na obdobje zadnjih dveh desetletij. Ugotavlja, da se zavest o umiranju prič časa, ki bi lahko spregovorile o svojih pogosto zelo travmatičnih izkušnjah (zlasti) v času fašizma in nacizma, izpričuje v nuji po pričevanju in beleženju spominov »zadnjih pričevalk/cev« (v dejavnost so vključeni zlasti dijaki višjih srednjih šol). Kaže pa se tudi v umetniških in civilnodružbenih angažmajih »postmemorijske generacije« in mladih v širšem smislu ter v vzpostavljanju digitalnih »spominskih krajin« in pedagoških čezmejno in dialoško usmerjenih projektov.

Ključne besede: mladi Slovenci/ke v Avstriji, mladi Slovenci/ke v Italiji, postmemorijska generacija, kultura spominjanja, dialog

I GIOVANI CONTRO L'OBLIO: CREARE UNA CULTURA DELLA MEMORIA E DEL DIALOGO TRA I GIOVANI SLOVENI IN AUSTRIA E IN ITALIA

SINTESI

L'articolo si basa su dati ricavati da pubblicazioni mediatiche, siti web (scuole medie, iniziative culturali ed educative, programmi e progetti), di indagini personali e ricerche scientifice, offre una visione teoricamente fondata sulla creazione di una cultura della memoria e del dialogo tra i giovani sloveni in Austria e in Italia. Si concentra sull'ultimo ventennio. Constata che la consapevolezza della scomparsa dei testimoni del tempo, che potrebbero raccontare le loro esperienze spesso molto traumatiche (sopratutto) durante il fascismo e il nazismo, si manifesta nella necessità di testimoniare e registrare i ricordi degli »ultimi testimoni« (nell'attività sono coinvolti soprattutto gli studenti delle scuole superiori). Si manifesta inoltre negli impegni artistici e nella società civile della »generazione post-memoriale« e, più in generale, dei giovani, nonché nella creazione di »paesaggi della memoria« digitali e di progetti pedagogici orientati al dialogo e alla collaborazione transfrontaliera.

Parole chiave: giovani sloveni in Austria, giovani sloveni in Italia, cultura della memoria, dialogo, generazione della postmemoria

UVOD[1]

Prispevek se začne z vpogledom v pomen spominskih proslav in projektov za pripadnike in pripadnice slovenskih narodnih skupnosti v Avstriji in Italiji. Ponazarja, da je ta pomen tesno povezan z emotivnim in kognitivnim odnosom do polpreteklih izkušenj v času fašizma in nacizma in da so njegovi ključni naslovniki mladi, še posebno, ker živih prič skoraj ni več. Posebno pozornost posveča nato »nuji pričevanja«, ki jo spodbuja zavest o umiranju zadnjih pričevalk/cev, ter »generaciji postmemorije« (Hirsch, 2012), to je generaciji potomk in potomcev, ki se vse bolj opazno spopada s pogosto travmatično in z odporom povezano zgodovinsko izkušnjo, ki so jo prenašali nanje prednice in predniki v kontekstu družine in širše kulture. Značilnost pripadnikov te generacije je, da to izkušnjo, ki jo zaznavajo kot pomemben del svojega sebstva, ustvarjalno poustvarjajo. Izražajo jo skozi literaturo, vizualno umetnost, film, gledališče, projekte, a tudi skozi znanstveno-raziskovalno dejavnost in na ta način, kot ponazarja prispevek, omogočajo, da ta izkušnja postane skupaj s spomini, ki se vežejo nanjo, zaznavna tudi v svojih neizrečenih, odrinjenih in transgeneracijskih vidikih. Odpirajo pa tudi vpogled v del sodobne zgodovine, ki ni le osebna in družinska, temveč tudi širša kolektivna in družbena. Očitno postaja, da se njihova dela vključuje tudi v šolske (zlasti višje srednješolske), a tudi zunajšolske izobraževalne programe in projekte, kar omogoča, da postajajo dostopna »poznejšim rodovom« tudi zunaj slovenskih manjšinskih skupnosti. Mladi so danes vse bolj razumljeni kot soustvarjalci kulture spominjanja. Osnova za to ugotovitev so podatki, ki jih je avtorica tega prispevka pridobila prek medijskih objav, spletnih strani srednjih šol (zlasti Slovenske gimnazije in Dvojezične trgovske akademije v Celovcu ter nižjih in višjih srednjih šol s slovenskim učnim jezikom v Trstu in Gorici) ter kulturnih in izobraževalnih pobud in projektov, ki jih pomembno oblikujejo ali sooblikujejo mladi Slovenci in Slovenke v Avstriji in Italiji. Podatke, ki zajemajo obdobje zadnjih dveh desetletij, je v primeru manjkajočih informacij (na primer letnic, navedb krajev, vsebinskih nejasnosti) dopolnila z lastnim poizvedovanjem. Iz njih izhaja, da mladi sodelujejo v široki paleti šolskih in drugih projektov, ki so čezmejno in dialoško usmerjeni. Vse bolj se tudi zavedajo, da občutljivost na grozote fašizma in nacizma v državah, v katerih živijo, in tudi drugod po svetu bledi in da je treba delovati »proti pozabi«.

POMEN SPOMINSKIH PROSLAV IN PROJEKTOV

»Poznejšim rodovom moramo dati živ spomin na pregon. Zato se je treba v družinah pogovarjati in zbuditi zanimanje za polpreteklo zgodovino.« To misel je izrekel Nužej Tolmajer[2] na spominski proslavi 11. julija 2022 na Ljubelju, kjer je med 2. svetovno vojno delovalo koncentracijsko taborišče, podružnica Mauthausna (Volksgruppen ORF, 2022). Proslava, ki se je odvijala na severni ali avstrijski strani ljubeljskega predora (Ljubelj/Loibl sever), je bila v znamenju 80-letnice pregona koroških Slovenk in Slovencev. Imela pa je tudi močan simbolni pomen. Tolmajer se je rodil 23. julija 1942 v taborišču Frauenaurach v Erlangnu, enemu izmed več taborišč Volksdeutsche Mittelstelle, kamor so 14. in 15. aprila 1942 pregnali okrog 200 koroških slovenskih družin oziroma 1100 oseb (Sima, 2012, 39). Tudi dijakinje in dijaki Dvojezične trgovske akademije v Celovcu so ob 80-letnici pregona pripravili spominsko slovesnost, ki je pod geslom »Mladina proti pozabi«[3] potekala v avli šole.[4] Na spominski slovesnosti je sodelovala tudi Anica Wurm-Olip, ki se je rodila 14. junija 1943 v ženski kaznilnici Aichach na Zgornjem Bavarskem, kamor so deportirali njeno mamo. Svojo življenjsko zgodbo, ki vključuje tudi »usodo« njene družine pri po domače Jerebu (Olip) na Obirskem, je zbrala v knjigi *Rojena na kraju smrti ... in preživela* (Wurm-Olip, 2019), ki je izšla v obeh koroških deželnih jezikih in iz katere je na slovesnosti brala. Tako Nužej Tolmajer kot Anica Wurm-Olip sta potomke in potomce v ožjem in širšem pomenu besede soočila s travmatično izkušnjo, ki v času, ko se je zgodila, ni mogla biti vključena v simbolno in je dolgo časa ostala zunaj zavesti: zato o njej nista mogla govoriti ali nanjo opozoriti, kot da bi bila zanju nekaj zunanjega. Nasprotno, vsak spomin na to izkušnjo je bil in je boleč, preboleč, stanje, ki se poraja iz *notranjosti* organizma.[5] »Spomin na žrtve nacizma«, tako Wurm-Olip (2019, 34), »živi v nas, v njihovih potomcih, naprej in nikoli ne bo umrl«. Ni naključje, da se je aprila 2025, ob 80. obletnici konca druge svetovne vojne, pred spomenikom umetnika Valentina Omana na železniški postaji v

1 Prispevek je nastal v okviru raziskovalnega projekta 5320-76/22 *Vzpostavljanje kulture spominjanja in dialoga med mladimi Slovenkami in Slovenci v Avstriji in Italiji*, ki ga je financiral Urad Vlade Republike Slovenije za Slovence v zamejstvu in po svetu (obdobje trajanja projekta: marec 2023 – december 2024), in raziskovalnega programa P5-0409 *Razsežnosti slovenstva med lokalnim in globalnim v začetku tretjega tisočletja*, ki ga financira Javna agencija za znanstvenoraziskovalno in inovacijsko dejavnost Republike Slovenije (ARIS).

2 Nužej Tolmajer se je rodil leta 1942 v izgnanstvu, doraščal pa je v takratni občini Radiše. Bil je dolgoletni tajnik Krščanske kulturne zveze (1965–2004) v Celovcu, od leta 2004 do svoje smrti avgusta 2025 je bil predsednik tamkajšnjega Narodopisnega inštituta Urban Jarnik.

3 Geslo je naslov istoimenskega projekta, ki ga na Dvojezični trgovski akademiji kot mentorica vodi učiteljica Mirjam Zwitter-Šlemic, ki je po izobrazbi pravnica. Skupaj z Evo Hartmann, profesorico na Pedagoški visoki šoli v Celovcu, je od leta 2025 tudi predsednica Zveze slovenskih pregnank in pregnancev na Koroškem, ki se pod njunim predsedstvom osredotoča na spominsko delo in na izvajanje ter podporo raznih spominskih, umetniških in znanstvenih projektov (Grilc, 2025).

4 Novice, 14. 4. 2022: Da spomin ne zamre, se mladina spominja, 15.

5 Rojstvo »na kraju smrti« je Anica Wurm-Olip (2025, 4) opredelila kot »stvar, ki ostane v kosteh«.

Žrelcu zbralo tisoč zlasti mladih ljudi, da bi na impresiven umetniški način posredovali in počastili spomin na vrnitev pregnanih koroških slovenskih družin, za katere se je pričela pot prav tu, na tej postaji.[6]

»Vlak spomina«, od leta 2014 »Memobus«, je ime projekta, ki ga organizira goriško združenje 47|04[7] in je namenjen dijakom italijanskih in slovenskih višjih srednjih šol v Furlaniji Julijski krajini; od leta 2024 se za dijake slovenskih šol izvaja program, ki v celoti poteka v slovenskem jeziku.[8] Vrhunec projekta, pri katerem vodilno sodeluje zgodovinar Štefan Čok,[9] je ob predhodnih interaktivnih delavnicah, v katerih so sodelovali preživeli taboriščniki, danes pa njihovi potomci, večdnevni obisk »krajev memorije« (Pierre Nora). Pot se začne v nekdanji Rižarni pri Sv. Soboti nad Trstom, ki jo je nacistični okupator leta 1943 spremenil v koncentracijsko taborišče in mu leto pozneje dodal še krematorij, v katerem so sežgali med 4000 in 5000 ljudi. Žrtve so bile po večini Slovenci in Hrvati s Tržaškega in iz Istre, osumljeni partizanstva ali sodelovanja v narodnoosvobodilnem boju, pa tudi italijanski protifašisti, Judje, Romi in homoseksualci. Rižarna je bila tudi zbirno središče za odhod v druga koncentracijska taborišča na Poljskem in v Nemčiji – iz Trsta so odpeljali približno 20.000 zapornic in zapornikov, večinoma Judov (Benedetič et al., 1978, 116–118). Memobus dijakov zato krene tudi na Poljsko, točneje v Krakov (ogled judovskega geta, Schindlerjevega muzeja) in v uničevalno taborišče Auschwitz-Birkenau, ki se tako – kot to na primeru nekdanjega koncentracijskega taborišča Ljubelj ponazarjajo Daniel Wutti et al. (2022) – spreminja v transnacionalni, od leta 2024 pa predvsem v transgeneracijski »učni prostor«, ki skozi analizo in refleksijo lahko vodi do boljšega razumevanja in sporazumevanja.

NUJA PRIČEVANJA IN »GENERACIJA POSTMEMORIJE«

Obstajajo izkušnje, ki se tako globoko in vztrajno zasidrajo v individualno in kolektivno memorijo, da jih ni mogoče izbrisati. Sem sodi izkušnja fašizma, nacizma, pregnanstva in koncentracijskih taborišč, ki s svojo grozo za žrtve pogosto simbolizira prav tisti prelom, ko simbolizacija odpove v svoji pomirjevalni in hkrati apelativni (pričevanjski) funkciji. Ta izkušnja deluje prek prebliskov, vizij, podob, vonjav, okusov, pa tudi prek neumornih refleksij, ki so tako značilne za tiste »priče časa«, ki so danes še žive in so bile v času pregona in deportacij predvsem otroci ali niti še rojeni otroci. Pisateljica Marica Bodrožić (2014, 329) je, nanašajoč se na vojno (v nekdanji Jugoslaviji), zapisala: »Nobena vojna ne neha samo zato, ker molči orožje. Vsaka vojna zapušča dediščino, temne darove, ki živijo v obrazih, zgodbah, telesih, stavkih in v domišljiji ljudi kot bolezen na preži.« To dediščino je mogoče opredeliti s pojmom *memorija*, ki se navezuje na nevrofiziološke telesne funkcije ter na nezavedne ali še ne ozaveščene vidike doživetega, pripovedovanega, slišanega, medtem ko sta pojma *spomin* in *spominjanje* tesno povezana s procesi ozaveščanja, rekonstrukcije in soočanja, vse do sistematičnega prizadevanja, da bi bila travmatična dediščina oprijemljiva in kar se da predelana.[10] Anica Wurm-Olip je travmatična dogajanja v povezavi s svojo družino, ki so jo spremljala že v materinem trebuhu in nato ob in po rojstvu, raziskovala vse svoje življenje. Hotela je poznati vse podrobnosti. Spraševala je, zbirala dokumente in si vseskozi zapisovala, kajti, kot pravi, »piše, mora pisati«, da bi predelala »pošastno«, ki ga je doživela vsa njena družina (njeni starši in njunih osem otrok, vključno z njo). To, kar se je zgodilo takrat, se ji zdi še danes nepredstavljivo. »To je tako boleče, da tega sploh ne moreš ubesediti. Zdi se mi, da se s tem še vedno spopadam, ne morem se od tega odmakniti. Je kot obroč okoli mene, ki se nikoli ne razrahlja« (Wurm-Olip, 2019, 86, 103).

Zagata neizrekljivosti se pogosto pojavi skupaj z »nujo pričevanja« (Jurić Pahor, 2008) ter zavedanjem, da memorija ve dosti več, kot človek lahko prikliče v spomin in izpove. Razpre travmatsko izkušnjo v skrajnih razmerah, ki vsakič znova zamaje njeno dosedanje osmišljanje. Psihoanalitičarka Anita Eckstaedt (1989, 469) napeljuje na ta pojav, ko pravi: »Grozot se ne pozabi. [...] Travmatski dogodek evocira proces predelave, ki nikdar ne preneha«. Evocira pa tudi tesnobo, ki se po Heideggru od strahu razlikuje po tem, da se ne veže na noben konkreten vzrok. Svet se v počutju tesnobe kaže kot brezimen v svoji nedomačnosti. Tesnobe ne prikliče nič znotraj sveta, nobeno »znotrajsvetno bivajoče«, temveč »vrženost« (rojenost) v faktičnost sveta, v danem primeru nasilnega, totalitarnega in razčlovečenega sveta, ki daje pečat razmerju do njega. Z besedami Heideggera (2005, 259): »[…] to, pred čimer je tesnobi

6 Prireditev je organizirala Zveza slovenskih pregnank in pregnancev na Koroškem (Trampusch, 2025).

7 Številki 47|04 sta skrajšani letnici. Leta 1947 je bila podpisana mirovna pogodba med Italijo in Jugoslavijo, leta 2004 pa je Slovenija vstopila v Evropsko unijo (QuarantasetteZeroQuattro, 2025).

8 Primorski dnevnik, 25. 4. 2024: Vsi bi morali vsaj enkrat obiskati »pekel«, 16–17.

9 Štefan Čok, rojen leta 1983 v Trstu, je zgodovinar in raziskovalec Odseka za zgodovino in etnografijo pri Narodni in študijski knjižnici v Trstu. Kot suplent je hkrati več let poučeval na Liceju Franceta Prešerna v Trstu. Od leta 2017 je predsednik študijskega centra Dialoghi Europei.

10 Razloček med memorijo in spominom je v slovenski znanstveni prostor vpeljala Taja Kramberger, da bi pri prevodu knjige Maurica Halbwachsa *La mémoire collective* upoštevala njegovo konceptualizacijo pojmov *mémoire* in *souvenir* (Kramberger, 2001). Na njeno ugotovitev, da slovenščina še nima dveh izrazov (v uporabi je bil in je pogosto še naprej le termin »spomin«), ki bi jih bilo treba v namene bolj elaboriranega vstopa v raziskovalno polje upoštevati, se je – pa čeprav z drugačnimi poudarki – navezovala tudi avtorica pričujoče raziskave (Jurić Pahor, 2007; 2017).

tesno, je bit-v-svetu sama«. V izkustvu tesnobe, ki ji ni tesno spričo ničesar v svetu zato, ker ji je tesno pred svetom samim, kot to v sozvočju z ugotovitvijo Anite Eckstaedt poimenuje Heidegger, iz »svetle noči niča tesnobe izraste izvorna odprtost bivajočega kot takega: da je bivajoče – in ne nič« (Heidegger, 2005, 37).

Renata Salecl (2007, 123) se sklicuje na freudovsko psihoanalizo, ko pravi, da tesnoba predstavlja eno od možnih poti, po kateri subjekt obravnava travmatične spomine. Tesnoba, tako Salecl, postavlja travmatizirani subjekt na določeno distanco, kar mu omogoči, da dogodek drugič izkusi na drugačen način, na primer v sanjah in nočnih morah. Lahko pa ga znova izkusi denimo tudi prek risb in spisov, kar povedno izhaja iz dvojezične razstave *Quando morì mio padre / Ko je umrl moj oče*, ki so jo leta 2005 pripravili Metka Gombač, Boris M. Gombač in Dario Mattiussi (2005). V središču razstave so risbe in spisi, ki so jih otroci nekaj mesecev po vrnitvi iz italijanskih koncentracijskih taborišč (Rab, Gonars, Monigo/Treviso, Visco, Renicci) leta 1944 pisali v partizanskih šolah. Učitelji so otrokom skušali pomagati pri premoščanju hude življenjske travme. Razstava vključuje tudi nekaj risb v Trstu rojenega akademskega slikarja Staneta Kumarja, ki je v koncentracijskih taboriščih na Rabu (1942) in pozneje v Gonarsu (1943) od jutra do večera opazoval otroke (upodobil je tudi novorojenčka) predvsem zato, da bi po vojni čim nazorneje opozoril na njihovo neizmerno trpljenje. Slikarjev vzgib za dokumentiranje trpljenja je bil tako silen, da je celo med odpadki izbrskal »dve kovinski plošči«, v katere je »vgraviral risbe otrok«; obe plošči je »pretihotapil domov [v Ljubljano] in jih do konca vojne skrival v kleti« (Kumar, 1980, 144–147). Razstava je bila vrsto let na ogled v številnih krajih v Italiji, Sloveniji in Avstriji. Njeni naslovniki so bili in so predvsem višješolke in višješolci. Spremlja jo katalog z istim naslovom, ki omogoča poglobitev njenih vsebin (Gombač et al., 2005). Spodbudila pa je tudi nove raziskave (Gombač & Gombač, 2013) in vplivala na projekte, med katerimi izstopa fotografsko-dokumentarna razstava s pomenljivim naslovom *Zadnji pričevalci*, ki so jo leta 2013 premierno predstavili v Muzeju novejše zgodovine Slovenije v Ljubljani, gostovala pa je tudi v Trstu.

Razstavo so postavile novinarka Saša Petejan, fotografinja Manca Juvan (s portreti sogovornikov ter posnetki osebnih predmetov, pisem in nekdanjih krajev internacije) in zgodovinarka Urška Strle.[11] V njenem ospredju so osebne zgodbe še zadnjih preživelih, ki so bili iz Ljubljanske pokrajine v italijanska fašistična taborišča odpeljani v letih 1942 in 1943, ter njihovih svojcev. Razstava je dala vedeti, da je utelešeni spomin pričevalcev, v tem primeru zlasti mlajših in mladih internirancev, enkraten in nezamenljiv, predvsem pa, da je »živ« – tudi v smislu občutenja tesnobnosti oziroma oživitve spomina na travmatične situacije ter odprtosti do drugega, da je torej »bivajoče – in ne nič«. Avtorice razstave so ta pojav opisale takole: »Razstavni prostor se je pogosto spremenil v čustveni prostor, v katerem so močni občutki zmede in osuplosti nad neznano preteklostjo prišli v ospredje; in v prostor, v katerem je prihajalo do izmenjav anekdot, informacij in globokega sočutja med preživelimi, njihovimi sorodniki in gledalci« (Varuhizlice, 2025).

Ko prič časa ne bo več, bo ugasnil tudi ta čutno-konkretni spomin na čas fašističnega in nacifašističnega preganjanja. Česar se ni več mogoče neposredno spominjati, si je mogoče predstavljati le še s pomočjo potomcev in potomk, ki se travmatičnih izkušenj prič časa lahko »spominjajo« samo še na podlagi pripovedi, zgodb, podob in vedenj, s katerimi so doraščali in odraščali, ter s pomočjo medijev: z besedili, knjigami, fotografijami, filmi, slušnimi posnetki, ipd. Marianne Hirsch (2012) govori v tem smislu o postmemorijski generaciji, t. i. *generation of postmemory*. Postmemorija po njenem opisuje odnos, ki ga ima »naslednja generacija« do individualnih, kolektivnih in kulturnih travm tistih pred njo. Travma, s katero se Hirsch težiščno ukvarja, je holokavst.

Koncept postmemorije je mogoče razširiti tudi na individualne, kolektivne in kulturne travme, ki niso neposredno vezane na izkušnjo holokavsta, na primer na pregon, taboriščno ali partizansko izkušnjo v času druge svetovne vojne ter na tretjo in celo na četrto generacijo, to je generacijo vnukov in pravnukov. Hirsch predpostavlja, da postmemorija ni identična s spominom: generacija potomcev travmatskih izkušenj prve generacije ni neposredno doživela, »spominja« se jih le posredno – prek zgodb in doživljanj predhodne ali predhodnih generacij, medosebnih odnosov z njimi, a tudi prek tabuiziranj določenih tematik in molka, ki ima v sebi močan potencial ohranjevanja in se zato kaj rad izmika pripovedni rekonstrukciji (Jurić Pahor, 2006; 2011). Te danosti in izkušnje so se na potomce prenesle s takšno afektivno močjo, da se zdi, da so sami po sebi spomini. Toda, kot poudarja Hirsch (2012, 5), povezave s preteklostjo, značilne za postmemorijo, ne posreduje priklic v spomin, temveč domišljijsko vlaganje, projekcija in ustvarjanje – poustvarjanje, ki se giblje v območju posredovane, presejane, razdrobljene preteklosti. Spominjanje se v tem smislu izkazuje kot sestavljanje mnogoterih izmuzljivih in neulovljivih delcev te preteklosti.

»ANGEL POZABE« (M. HADERLAP) IN TRANSGENERACIJSKI PRENOS TRAVM

Postmemorijo je mogoče razumeti kot strukturo transgeneracijskega prenosa travm in hkrati kot lasten, specifičen način zamišljanja. Maja Haderlap, koroška Slovenka iz Lepene pri Železni Kapli, v svojem izjemno

11 Virtualni ogled razstave je dostopen na spletni strani Varuhizlice (2025).

odmevnem romanu *Engel des Vergessens* (2011a), *Angel pozabe* (2012; slovenski prevod), v katerem je na avtobiografski način ubesedila zlasti pripovedi in spomine svoje babice (preživela je koncentracijsko taborišče Ravensbrück) in svojega očeta (z dvanajstimi leti je postal najmlajši koroški partizan in bil pred tem, čeprav še otrok, preganjan in mučen), ponazori, da je pogled v zadnji instanci usmerjen vanjo, v pripovedovalko, v to, da potrebuje izraz, ki bi opisal učinek (ne le) babičinih in očetovih travmatizacij, zapoznelost tega učinka in njegovo večplastno posredovanje, kajti: »Moj Jaz ne reče Jaz. Nastopa na svojem lastnem odru. Govori v kodiranih jezikih, skriva se v starih in novih preoblekah« (Haderlap, 2012, 138). Pripovedovalka se vztrajno uri v tem, da bi slišala »vsaj zven svojih misli, ga razločila v mnoštvu drugih tonov« in brž ko ga zazna, »potone v vrvežu glasov«. A se, prepričana, da ga je vendarle zaznala, »ne more več odtrgati od njega« (Haderlap, 2012, 138). Skozi tenkočutno izpisan odnos vnukinje in babice, hčerke in očeta, ki vključuje tudi usode sorodnikov in domačinov, omogoča vpogled v pojav, ki ni le oseben ali družinski, temveč širši kolektivni in kulturni, saj ogovarja zgodovinsko resnico ljudi, ki so doživeli in preživeli podobno travmatično izkušnjo, katere učinki odzvanjajo vse do danes.

Angel pozabe pripomore k artikulaciji strahov, travm, a tudi k izstopu iz »tišine spomina« (Hrobat Virloget, 2021), »saj sem«, kot pravi pisateljica (Haderlap, 2011b), »s svojim romanom očitno odprla nekaj, o čemer so doslej praviloma molčali ali to vsaj zelo neradi omenjali«. Najbolj intenzivne so bile reakcije na Koroškem. Ljudje, tudi povsem neznani, so pisateljico ustavljali na ulici, jo objemali, ji čestitali, se ji zahvaljevali za ta roman (Borovnik, 2017). Izjemen pomen in vrednost *Angela pozabe* potrjujejo številni ponatisi, prevodi ter literarne nagrade. Knjiga je dostopna tudi v Braillovi pisavi.

Že kmalu po izidu je bil roman *Angel pozabe* vključen v šolski načrt. Na Slovenski gimnaziji v Celovcu je imel in ima pomembno funkcijo »reparativne socializacije« (Opetnik, 2024, 164), ki se kaže tudi v tem, da profesorji dijake spodbujajo, da se aktivno, tudi prek projektov in obiskov spominskih krajev, kot so nekdanja koncentracijska taborišča Dachau, Mauthausen, Auschwitz-Birkenau[12] in Rižarna v Trstu (slednjo v okviru spoznavanja sosednjih regij in mest obiskujejo že vrsto let zadnji letniki Kugyevih razredov), ukvarjajo z nacističnim obdobjem, ter jih podpirajo pri pripravi referatov, maturitetnih nalog in predstavitvi svoje transgeneracijsko pogojene družinske zgodovine (Wutti, 2013a, 105; 2013b, 50; Opetnik, 2024, 164; SLOGAT, 2024). Podobno velja, kot nakazuje uvodno poglavje tega prispevka, tudi za Dvojezično trgovsko akademijo v Celovcu. Dijaki zadnjih razredov tako gimnazije kot tudi trgovske akademije so sodelovali pri strokovni ekskurziji *Po poteh romana Angel pozabe*, prvi v sklopu projektnega tedna *Koroški Slovenci in Slovenke* (Dijaki in dijakinje 8. b razreda, 2021), drugi prvič skupaj s Srednjo ekonomsko šolo Ljubljana – Roška v okviru programa Evropske unije Comenius, ki spodbuja mednarodno sodelovanje šol (HAK-TAK, 2013/2014), in drugič na namenski ekskurziji (Založnik, 2019).

Celostno učenje v sklopu ekskurzije vodi pisateljičin brat Zdravko Haderlap. V te in sorodne namene je na svoji domačiji, pri po domače Vinkelnu (tu se je rodila tudi Maja Haderlap), ustanovil center a-Zone, ki je namenjen zlasti šolski in zunajšolski mladini (prim. Polanšek, 2019; a-Zone, 2025). Raziskovalni pohod vključuje predstavitev domačije, ogled nekdanje lepenske osnovne šole, ki ima od leta 2012 status društva (prim. Lepener Schule/Lepenska šola, 2025), ter obisk sosednjih kmetij in Peršmanove domačije, ki danes ni samo eden najpomembnejših spominskih krajev koroških Slovenk in Slovencev, temveč tudi mednarodno priznan muzej in učni prostor s široko ponudbo tudi za šole in izobraževalne ustanove (Muzej/Museum Peršman, 2025). Odkar je avstrijska policija iz še komajda pojasnjenih razlogov 27. julija 2025 na Peršmanovi domačiji, kjer je potekal antifašistični mladinski tabor, izvedla policijsko racijo, je popularnost muzeja strmo narasla.

Posebna komisija avstrijskega notranjega ministrstva, ki je racijo preiskala, je v svojem poročilu, ki je bilo objavljeno tudi v slovenščini, prišla do zaključka, da je bila racija v mnogih pogledih nezakonita in nesorazmerna. Poročilo ugotavlja, da racija ni bila usmerjena proti slovenski narodni skupnosti, niti proti Peršmanovi domačiji kot kraju spomina, ampak proti antifašističnemu taboru, ki je bil posplošujoče dojet kot levičarska ekstremistična organizacija. Njen očitni cilj je bil pridobiti osebne podatke vseh (mladih) udeležencev tabora (BMI, 2025a; 2025b). Podobno je Eva Hartmann, podpredsednica Društva Peršman,[13] kmalu po raciji ocenila, da je ta imela namen »zastraševanja in kriminalizacije mladih, ki se angažirajo za antifašistično izobraževanje« (Vidmajer, 2025, 25). Prvič se je evropska mladina (okoli 100 oseb) zbrala na antifašističnem taboru že leto dni pred tem, med 25. in 28. julijem 2024, da bi se posvečala tematikam, kot so: razumevanje zgodovinskih in aktualnih resničnosti, čezmejno mreženje, potreba po

12 Štefan Pinter, leta 2021 upokojeni učitelj ruščine, zgodovine, psihologije in filozofije na Slovenski gimnaziji, je organiziral kar dvajset potovanj za dijakinje in dijake v nekdanje nacistično uničevalno taborišče Auschwitz-Birkenau in Krakov, mesto z bogato judovsko zgodovino. Potovanja je pripravljal in izvedel večinoma skupaj s poljskim slovenistom Emilom Tokarzem. Z gimnazijci je dvakrat sodeloval tudi pri projektu *A Letter to the stars*, leta 2008 skupaj s preživelo pričo pregona koroških Slovencev 14. in 15. aprila 1942 Miro Zorec, rojeno Wutti, na Zilji. Projekt, ki se je začel leta 2003, velja za največji in najbolj trajnosten projekt šolske zgodovine v Avstriji (Wakounig, 2021; Pinter, 2000; Kuba, 2008; Zorec, 2008).

13 Eva Hartmann je, kot v uvodu že povedano, od leta 2025 ob Mirjam Zwitter Šlemic tudi predsednica Zveze slovenskih pregnank in pregnancev na Koroškem.

konkretni strukturi v boju proti desnemu ekstremizmu in sodobnemu fašizmu, odpor.[14] Dogodek, ki je vključeval tudi branje odlomkov iz romana Maje Haderlap, je – tako kot leta 2025 – organizirala delovna skupina mladih, ki je aktivna zlasti v Klubu slovenskih študentk in študentov na Dunaju (Gabriel, 2024; Poljšak, 2024). Prvoosebna pripovedovalka v *Angelu pozabe* navaja, da je pri Peršmanovih rad posedal njen oče, ki se je vse življenje soočal s strahovi, ki sta jih v njem pustila nacizem in vojna, in sicer »v kuhinji, pri Anči [Sadovnik], ki je takrat, ko je SS postrelil vso družino [štiri odrasle in sedem otrok], preživela« (Haderlap, 2012, 78). Številne koroške Slovenke in Slovence je policijska racija 27. julija 2025 globoko pretresla, še posebno, ker je do nje prišlo v letu spominjanja: osemdeset let po koncu druge svetovne vojne in povrhu v kraju, ki evocira grozoviti zločin.

Roman *Angel pozabe* je leta 2019 postal obvezno čtivo za maturitetni esej dijakinj in dijakov zadnjih letnikov srednjih šol v Sloveniji (Šebenik & Bizilj, 2019).[15] Obsežna in izjemno dodelana metodično-didaktična navodila je za soočanje z romanom omogočil literarni zgodovinar Zoran Božič (2020). Roman Maje Haderlap so obravnavali tudi na koroških šolah zunaj območja dvojezičnega šolstva (Danglmaier et al., 2017, 121, 143). Pripovedna moč romana se zdi neusahljiva. Še leta 2025 so se z njim na primer soočali v Bralni skupini Kranj. Nekateri njeni člani so si že leta 2014 ogledali gledališko predstavo *Angel pozabe* v SNG Drama v Ljubljani in obiskali »domačijo, na kateri živi [pisateljičin] brat Zdravko« (Logar, 2025). Avtor in režiser odrske priredbe je bil Igor Pison, tržaški Slovenec, rojen leta 1982, ki je na univerzi v Trstu študiral germanistiko, v Münchnu pa se je izšolal za gledališkega in opernega režiserja. Dramaturginja je bila Eva Kraševec (2014, 14), ki je v gledališkem listu zapisala, da »uprizoritev Angela pozabe išče svoje osišče prav v tenkočutnem prenašanju avtoričinega literarnega postopka v medij gledališča.« Premiera je bila 14. marca 2014, do začetka januarja 2016 pa je bilo izpeljanih že več kot 50 ponovitev, med njimi številna gostovanja zlasti v Sloveniji in na Koroškem. SNG Drama je gostovala tudi v Mestnem gledališču v Celovcu in v Slovenskem stalnem gledališču v Trstu, kjer so bile vse ponovitve nemudoma razprodane (SSG, 2015). Dunajsko gledališče Akademietheater je odprlo svojo novo sezono v letu 2017 z lastno priredbo *Angela pozabe* za oder (ORF, 2017).

Angel pozabe je napisan iz perspektive deklice, ki je glavni lik in pripovedovalka romaneskne zgodbe, kar pomeni, da je v njej ubesedena tudi tematika transgeneracijskega prenosa travm, ki je tudi na znanstveni ravni deležna vse večje pozornosti. Izstopa pa, da se med pripadniki slovenskih manjšin v Avstriji in Italiji ukvarjajo s to tematiko skorajda izključno raziskovalke in raziskovalci, ki so se rodili, delovali ali pa delujejo na Koroškem. Razlog je v tem, da je javnost v nemškem govornem prostoru do obravnave koncentracijskih taborišč bolj odprta kot v Italiji,[16] a tudi v tem, da so na Primorskem za razliko od Koroške po drugi svetovni vojni privilegirali zmagoviti borčevski spomin, v znatno manjši meri pa tistega na deportacije, internacije in vojne travmatizacije. Štefan Čok, ki je v okviru projekta Memobus v Auschwitz-Birkenau med letoma 2015 in 2023 spremljal italijanske in slovenske dijake, od leta 2024 dalje pa zaradi odločitve, naj potovanje udeležencev slovenskih višjih šol v celoti poteka v slovenskem jeziku, le še dijake teh šol (kar odgovarja upoštevanju jezikovnih pravic slovenskih dijakov, implicira pa tudi narodnostno segregacijo kot posledico italijanske državne politike, ki vedno znova opozarja na krivde nacizma ter jugoslovanskih partizanov in OZNE [»massacro delle foibe«], na fašistične zločine pa vztrajno pozablja[17]), je ob otvoritvi razstave o protifašističnih odporniških organizacijah TIGR in Borba

14 Podobnim tematikam se je s posebnim ozirom na odpor in spomin žensk ter tematikam, kot so antisemitizem, vojna v Ukrajini in Gazi, posvečal tudi antifašistični tabor v letu 2025 (BMI, 2025a, 86–91 [priloga 4]).

15 Zanimivo je, da je samo od jeseni 2018 do spomladi 2019 center a-Zone, kjer se tematizirajo tudi vsebine romana, obiskalo okoli 800 maturantk in maturantov iz Slovenije (Polanšek, 2019).

16 Carlo Spartaco Capogreco (2004, 4) v svoji prelomni obravnavi tematike fašističnih taborišč ugotavlja, da italijanska javnost ve »le malo, ne samo o tem, kaj se je dogajalo v taboriščih, ampak tudi o tem, da so med drugo svetovno vojno sploh obstajala italijanska koncentracijska taborišča«. V Rimu živeči nemški zgodovinar Lutz Klinkhammer (2003, 331) njegove ugotovitve potrjuje, ko naslavlja vprašanje: »Katere vojne se spominja italijanska javnost, ko govori o drugi svetovni vojni? Odgovor je preprost: Gre skoraj izključno za nacionalsocialistično vojno v Evropi in obdobje nemške okupacije Italije od septembra 1943 do konca vojne.« Obetaven je bil zato projekt o italijanskih fašističnih koncentracijskih taboriščih s 50 dijaki dveh italijanskih licejev (Carducci Dante in Oberdan) in slovenskega liceja Prešeren v Trstu. Projekt, pri katerem so sodelovali združenje Documenta iz Zagreba (vodilni partner), goriško združenje 47|04 (Memobus) in fundacija Friedrich Ebert Stiftung (finančna podpora), je vodil Štefan Čok. Zaključil se je z obiskom taborišč Visco in Gonars (1. 3. 2019) ter Rab (30. 4. in 1. 5. 2019) (Pahor, 2019; Liceo Oberdan, 2025; Čok, 2025). Do nadaljevanja tega ali sorodnih projektov v naslednjih letih ni več prišlo (Čok, 2025).

17 Naj to ponazorita dva izmed značilnih odgovorov slovenskih dijakov na vprašanje, kako bi izkušnjo Memobusa 2024 hipotetično ocenili dijaki italijanskih šol, ki so v Auschwitz-Birkenau odpotovali teden dni za njimi. Anet Kastelic: »Menim, da je bila tudi italijanskim dijakom izkušnja zanimiva, vendar je (mogoče) ne cenijo tako kot mi«. Erik Farinelli: »Zdi se mi, da samo nekateri italijanski dijaki čutijo izkušnjo na podoben način [kot mi], predvsem tisti, ki prihajajo iz antifašističnih družin« (Primorski dnevnik, 25. 4. 2024: Vsi bi morali vsaj enkrat obiskati »pekel«, 16–17).

23. januarja 2024 v Evropskem parlamentu[18] dejal: »Mislim, da je ključ, ki se ga moramo danes posluževati, predvsem ključ empatije in kritičnega razmišljanja raje kot junaštva« (Čok, 2024, 9–10).

S transgeneracijskim prenosom travm v povezavi z nacistično strahovlado so se s posebnim ozirom na primer slovenske narodne skupnosti na Koroškem (delno tudi na Primorskem) ukvarjali ali še ukvarjajo: Marija Jurić Pahor (2004; 2006), ki je po izobrazbi sociologinja, študije v obliki monografij, a tudi znanstvenih razprav pa so izdali socialni psiholog Daniel Wutti (2013a; 2013b; 2015; 2022), klinična psihologinja Gitka Opetnik (2024; 2026) ter novinarka in režiserka dokumentarnih filmov Sabina Zwitter-Grilc (2022), ki je knjigi priložila tudi DVD svojega filma *Schatten der Scham* (Sence sramote). V dokumentarcu, ki je pet let po premieri v Avstriji leta 2018 doživel tudi krstno uprizoritev v angleškem prevodu v ZDA, med drugim spregovorijo tudi Peter Handke in Maja Haderlap ter potomke in potomci žrtev, delno tudi žrtve same, slovenskega, judovskega in romskega porekla. Daniel Wutti in Gitka Opetnik se s transgeneracijskim prenosom travm ukvarjata tudi kot psihoterapevta. Oba sodelujeta z društvom ASPIS v Celovcu, ki že več desetletij omogoča brezplačne psihoterapije, namenjene beguncem, migrantom in preživelim žrtvam nacizma ter njihovim potomcem in sorodnikom. Podlago za psihoterapevtsko obravnavo potomcev preživelih koroških Slovencev omogoča tudi razprava Luise Wirth (2022), doktorandke na Inštitutu Sigmunda Freuda v Frankfurtu.

KULTURA SPOMINJANJA IN DIALOGA

Pričevalk in pričevalcev, ki še danes, v visoki starosti, lahko pripovedujejo o doživetih grozotah in izkušnjah v času fašizma, nacizma in druge svetovne vojne, skoraj ni več. S časovnimi odmiki – od takrat je minilo že osemdeset do sto let – in umrlimi pričami časa pa se umika tudi komunikacijska memorija, kakor Jan Assmann (1997, 48–66) in Aleida Assmann (2006, 25–26) opredeljujeta verbalno in, kar sicer ne naglašata, nonverbalno prenašanje osebnih izkušenj. To časovno obdobje je določeno z menjavo treh do štirih generacij. Značilno zanj je ustvarjanje skupnega prostora izkušenj, spominov in pripovedi. Ko ta prostor, ki je tudi prostor bližine, tudi telesne bližine, umanjka, pride do preloma, ki ga ne določajo več biografske izkušnje. Aleida Assmann (2011, 40) govori tudi o bistveni strukturalni spremembi, za katero je značilno to, da se spomin loči od človeškega telesa in preide na materialne nosilce beleženja. Posredovanje spomina je možno le še s pomočjo medijev: z besedili in knjigami, fotografijami, filmi, videointervjuji in zvočnimi posnetki. Mogoče je govoriti tudi o prehodu v *kulturo spominjanja* (Assmann, 2006). Pojem kulture spominjanja zaobsega »vse možne oblike zavestnega spominjanja zgodovinskih dogodkov, osebnosti in procesov, pa naj bodo estetske, politične ali kognitivne narave« (Cornelißen, 2003, 555). Označuje »bolj ali manj osmišljen odnos do preteklosti in konstruktivnost odnosa do preteklih izkušenj glede na sedanjost in prihodnost« (Kuljić, 2012, 20).

Kultura spominjanja je vezana na družbene skupnosti, med katerimi so tudi nacije/države, narodne skupnosti in nadnacionalne skupnosti kot denimo Evropska unija (Evropa). Vezana pa je tudi na zgodovinsko dediščino prostora, ki je v obmejnih območjih, kot je italijansko-slovensko oziroma slovensko-italijansko območje, še posebno kompleksna. Meja namreč skozi zgodovino 20. stoletja ni bila le črta na zemljevidu, temveč stičišče (ali ločnica) različnih političnih in ideoloških sistemov, narodnosti, jezikov in kultur (Širok, 2012; Hrobat Virloget, 2023; Lampe, 2023; Lampe et al., 2026). Nadja Danglmaier et al. (2017) govorijo, nanašajoč se na Koroško, tudi o »spominskih skupnostih«, poudarjajoč, da je treba pri obravnavi zgodovine upoštevati tudi spomine manjšin in »drugih«, ki so pogosto izključeni iz prevladujočih zgodovinskih pripovedi.

Kultura spominjanja se osredotoča na vprašanje »Česa ne smemo pozabiti?« in na odgovore nanj; v tem smislu ima kultura spominjanja skupnosttvorni učinek (Assmann, 1997, 30). Tu, ali določneje na prehodu v kulturo spominjanja, se na primer začne prostorska inštalacija umetnika Ernsta Logarja, člana družine generacije vnukov, s trijezičnim naslovom *Konec spomina – koroški partizani in partizanke*. Logar je inštalacijo v okviru umetniškega društva pArtisan realiziral januarja 2008 v atriju palače Epstein, stavbe avstrijskega parlamenta. Na osmih televizijskih monitorjih, ki so stali na kuhinjskih mizah, so lahko obiskovalci spremljali umetnikove posnetke dvanajstih koroških slovenskih partizanov, devetih moških in treh žensk. Pogovore »zadnje generacije prič časa« je posnel umetnik sam. Srčika projekta, ki je na razpolago tudi kot knjiga z DVD zgoščenko (Logar, 2011), je apel javnosti, da se boj koroških partizank in partizanov prizna kot pomemben prispevek k osvoboditvi Avstrije in vzpostavitvi demokracije v drugi avstrijski republiki. Aleida Assmann (2011, 41) je ob soočanju z njegovo inštalacijo zapisala: »Zgodovinske žrtve koroško-slovenske manjšine so bile doslej prav tako izvzete iz nacionalnega narativa kot tudi iz nacionalne zgodovine upora.« Tem bolj pomenljivo je, da je bila Logarjeva inštalacija omogočena kot uradna aktivnost avstrijskega parlamenta, ki mu je takrat predsedovala Barbara Prammer (leta 2005 je bila slavnostna govornica na spominski svečanosti Zveze koroških partizanov pri Peršmanu).

18 Vsebinski avtor in kurator razstave z naslovom *Slovenci med prvimi protifašisti v Evropi 1920–1941* je bil tržaški zgodovinar Milan Pahor. Za več o razstavi gl. uvodnik predsednika Društva TIGR Primorske Gorazda Humarja *Kako in zakaj smo šli z razstavo v Bruselj* (Humar, 2024, 3–4).

Logarjevi umetniški stvaritvi je botrovala tudi potreba, da na novo pozicionira svojo lastno družinsko zgodovino. Na osnovi raziskovanj je ugotovil, da njegov ded Josef Logar ni padel kot vojak v wehrmachtu, temveč je sodeloval s koroškimi slovenskimi partizani in bil zaradi veleizdaje in razkrajanja obrambne moči 7. aprila 1945 usmrčen v nekdanji esesovski kasarni Feliferhof v Gradcu. V umetnikovi družini o tej okoliščini nikoli niso govorili, umetnik sam pa jo je iztrgal procesu pozabe in jo naredil znova dostopno – javno dostopno (Volksgruppen ORF, 2016). Njegova prostorska inštalacija naslavlja zlasti mlado generacijo. Na hrbtni strani platnice knjige *Konec spomina* (Logar, 2011) svojo težnjo ponazarja z besedami partizana-pričevalca Lipeja Kolenika (1925–2008): »Mladim ljudem bi svetoval oz. bi jim skušal dopovedati, da svoboda ne pride sama od sebe, temveč da se moramo vsak dan truditi za to, da ohranimo mir in svobodo in da ne bo vojne med ljudmi.«

Ne gre spregledati niti težnje, da tudi potomci, ki so pogosto že predstavniki generacije vnukov, prevzemajo odgovornost za zgodovinske dogodke, ki so zaznamovali njihove prednike in širšo slovensko narodno skupnost, ki ji tako ali drugače pripadajo. Ta odgovornost za resnico teh dogodkov že po definiciji presega osebno in tudi kolektivno: je nekaj, kar ima splošno vrednost in posledice. Na to zgovorno opozarja tudi umetniško zasnovani projekt *Solidarität an der Grenze / Solidarnost ob meji*, ki se, izhajajoč iz literarno-politične zapuščine Janka Messnerja fokusira na kolektivne travme koroških Slovenk in Slovencev v obdobju med letoma 1920 in 1945. Projekt so ob priliki stoletnice pisateljevega rojstva zasnovali in izvedli njegovi vnukinji Elena Messner in Dana Rausch ter Tobias Zarfl. Rezultat projekta je intermedialna knjiga, ki vključuje besedila, slike in odlomke iz filmov (dostopnih s QR kodo). Intermedialnost, ki je imanentna knjigi, a tudi potujoči razstavi, ki je nastala na njeni podlagi, je zamišljena kot razsežnost, ki se upira petrifikaciji kolektivnega spomina, ki zarisuje navidezno trdne in nepremostljive meje. Napotuje na dinamiziranje, dialogično odpiranje in prestopanje meje, ki vključuje tudi védenje o represiji, ki so ji bili koroški Slovenci in Slovenke izpostavljeni zlasti v času nacizma, in o neizpolnjevanju manjšinskih pravic v povojni Avstriji (Messner et al., 2021).

O tem védenju govorijo tudi dokumentarni filmi koroške Slovenke, režiserke in scenaristke Andrine Mračnikar, ki danes živi na Dunaju. Njen zadnji dokumentarni film *Verschwinden / Izginjanje* (Mračnikar, 2022) predstavlja po dokumentarcih *Andri 1924–1944* (Mračnikar, 2002) in *Der Kärntner spricht deutsch / Korošec govori nemško* (Mračnikar, 2006) tretji del trilogije o zgodovini in prihodnosti slovenske narodne skupnosti na Koroškem. Skupaj z Robertom Schabusom je v seriji *Universum History – Unser Österreich* v produkciji avstrijske televizije ORF ustvarila tudi dokumentarni in delno igrani film *Ein Jahrhundert unterm Mittagskogel / Koroška – stoletje pod Jepo* (Mračnikar & Schabus, 2016), ki pripoveduje zgodovino Koroške na primeru slovenske družine Ressmann iz Ledinc skozi štiri generacije od prve svetovne vojne do danes. Vsi filmi so zasnovani dvojezično in se težiščno nanašajo na čas nacizma. Mračnikar daje glas svojim prednikom in koroškim slovenskim ljudem, ki so sodelovali v odporniškem gibanju in wehrmachtu, se borili s partizani ter bili deportirani v delovna in koncentracijska taborišča. Tematizira tudi izgubo družinskih članov, izginjanje slovenskega jezika in tudi spominov. Izhodišče filmov je vedno osebno. Značilna zanje je postopna širitev spomina na družbena, večinsko-manjšinska razmerja, predvsem pa na antagonizme, v katerih se izraža politično bistvo družbe, ki so iz zaznave realnosti izključeni, ali bolje, zavrnjeni v pomenu, ki ga je temu pojmu dal Freud: do zavrnitve, nemško *Verwerfung* (Laplanche & Pontalis, 1972, 608–612), pride, ko se skupaj z neko neznosno predstavo, od katere se odtrgamo, izgubi tudi del realnosti, ki s to predstavo neločljivo sovpada. V tem smislu predstavljajo filmi Andrine Mračnikar tudi vrsto upora: »[U]pirajo se pozabi in izrinjenosti. Rešujejo ljudi in zgodbe pred popolnim izbrisom. Vračajo jih nazaj v kolektivno zavest, kamor tudi sodijo. Ker so del avstrijske, evropske in svetovne zgodovine« (MMC, 2023).

V zadnjem poldrugem desetletju se je na Koroškem močno razvilo področje filmske ustvarjalnosti. Velja omeniti odmeven filmski projekt *Iskrica*, ki je dijake slovenskih in dvojezičnih šol na Koroškem ob podpori obeh osrednjih kulturnih organizacij od leta 2011 do leta 2019 spodbujal, da ustvarjajo filme. Mladi so pisali scenarije v slovenščini, jih snemali in v filmih nastopali kot igralci. Projekt je vodil Miha Dolinšek, ki je že kot dijak Slovenske gimnazije v Celovcu razmišljal o novih oblikah mladinskega dela na Koroškem. Leta 1991 je v okviru Koroške dijaške zveze ustanovil skupino *Film mladje*, okoli sebe zbral mlade sodelavke in sodelavce, zlasti višješolce, in tako položil temelje koroškemu slovenskemu filmu. Leta 2013 je bil odlikovan z Zlatim znakom Javnega sklada Republike Slovenije za kulturne dejavnosti za enkratne izjemne dosežke v filmskem ustvarjanju. V utemeljitvi so zapisali: »Letošnji mladinski filmski projekt ›Iskrica‹ je prerasel vsa pričakovanja; postal je pravi festival koroških kratkih filmov. /.../ Okoli 130 mladih je na največje filmsko platno na avstrijskem Koroškem v celovškem kinu CineCity projiciralo 21 kratkih filmov« (Volksgruppen ORF, 2014). Konstanta kratkih filmov v sklopu projekta *Iskrica*, ki je medtem prešel na naslednjo generacijo – vanj je bilo vključenih blizu petsto dijakinj in dijakov – je bil poudarek na slovenskem jeziku; slovenščina (dvojezičnost) je, naj ostane in postane samoumevni izraz v multimedijski dejavnosti. Za Dolinška je pomembno: pri mladini mora priti v asociacijah s slovenskim jezikom do zamenjave perspektive: ne »moram« (govoriti slovensko) ampak »hočem« (govoriti slovensko) (Rihter & Gotthardt, 2021).

Čeprav je Dolinšek sam večkrat dejal, da so koroški Slovenci preveč obremenjeni s preteklostjo in ne gledajo v prihodnost (Volksgruppen ORF, 2014), do tematik na temo kulture spominjanja ni zaprt. Sodeloval je pri maturitetnem projektu *Mladina proti pozabi*, ki ga je v šolskem letu 2016/17 na Dvojezični trgovski akademiji (HAK-TAK) v Celovcu vodila strokovna učiteljica Mirjam Zwitter-Šlemic. V sklopu tega projekta so si dijaki najprej ogledali film *Risanje proti pozabi*, ki dokumentira nastanek istoimenske serije risb umetnika Manfreda Bockelmanna, na katerih upodablja otroke, ki so jih umorili nacisti. Film je nanje naredil globok vtis: tri dijakinje so za diplomsko nalogo izbrale temo, ki jo obravnava film, spontano pa se je porodila tudi ideja za širši projekt, ki je vključil celoten razred. Dijakinje in dijaki so se poglobili v čas nacionalsocializma v Celovcu in 29. novembra 2016 organizirali spominsko hojo skozi to mesto. K sodelovanju so povabili tudi druge celovške šole. Miha Dolinšek je o rasti in udejanjanju projekta, predvsem pa o tem, kako so dijaki doživljali priprave na ta projekt in kaj so se novega naučili, posnel kratek film, ki je bil prikazan 10. marca 2017, ko je HAK-TAK dober mesec dni pred 75. obletnico pregona koroških Slovenk in Slovencev vabila na slovesno odprtje razstave Bockelmannovih portretov. Ob tej priliki so predstavili tudi Dolinškov film, ki je »požel veliko pohvale, še posebej s strani umetnika«. Bockelmann je prireditev aktivno sooblikoval. Na podiju se je pogovarjal s Katjo Sturm-Schnabl o izkušnji pregnanstva v taborišče Eichstätt na Bavarskem, kjer so umorili njeno takrat osemletno sestrico Vero Sturm. Njen portret je umetnik narisal in sliko podaril šoli (Feinig, 2017; Peko, 2020, 141). Dolinšek je vključen tudi v nastajanje prvega celovečernega partizanskega filma *Mila / Marija* Andrine Mračnikar, posnetega z ženske perspektive in v avstrijsko-slovenski soprodukciji (predvajan bo tudi na obeh državnih televizijah). S pomočjo filmske igralke Martine Poel je februarja 2024 vodil kastinge za starostno skupino od 7 do 17 let; za vlogo v filmu igralske izkušnje niso bile potrebne (Verdev, 2024), mladim in najmlajšim pa je bila ob tem, da imajo dar za kreativnost in kar se da dobro govorijo slovensko, ponujena tudi priložnost, da sodelujejo pri filmu, ki se mu obeta velik uspeh. Velja pripomniti, da je Dolinšek Andrino Mračnikar, ko je bila stara 13 let, nagovoril za pisanje filmskega scenarija. Tako je nastal njen prvi film z naslovom *Bo bilo* (Rihter, 2022). V tej obliki prihodnosti je poudarjena zgodovinskost/preteklost, ki se uresničuje v subjektu.

Vžgano v spominih

Vžgano v spominih (Burnt in memories, Le memorie degli incendi) je naslov dokumentarnega filma Anje Medved in Nadje Velušček (2017a; 2017b), ki delujeta v okviru čezmejnega društva *Kinoatelje* s sedežema v Gorici in Novi Gorici in že vrsto let snemata spomine iz obmejnega območja v avtorsko zaščitenih filmskih produkcijah (za katere sta bili tudi večkrat nagrajeni). Film je del istoimenskega projekta, ki ga je sofinancirala Evropska unija iz programa Evropa za državljane. Vodja projekta, ki je nastal pod okriljem Znanstveno raziskovalnega središča Koper in je med seboj povezoval sedem partnerjev večnarodnostnega območja med (današnjo) Italijo, Slovenijo in Hrvaško, je bil zgodovinar Gašper Mithans. Na omenjenem ozemlju se je v zadnjih dobrih sto letih zvrstilo nešteto vlad in mej, med drugo svetovno vojno pa so bili kraji in ljudje v takratnem Jadranskem Primorju (Adriatisches Küstenland) žrtve smrtonosnih totalitarnih ideologij – fašizma in nacizma. Eden od ukrepov, s katerim si je oblast, ena ali druga, poskušala podrediti prebivalstvo, je bilo zastraševanje. Zato so se po sleherni partizanski uporniški akciji znesli nad civilnim prebivalstvom; eden od pogostih povračilnih ukrepov so bili požigi vasi. Požige vasi so praviloma spremljali poboji, ropanja, deportacije v koncentracijska in delovna taborišča ter drugo nasilje (Mithans, 2019).

Film *Vžgano v spominih* beleži spomine tistih, ki so požige doživeli in preživeli (takrat so bili še otroci) ter drugih, ki so ob vrnitvi domov o njih poslušali svoje sorodnike in sovaščane. Poleg ustnih pričevanj film dokumentira tudi fotografije požganih vasi, družinske fotografije, osebne dokumente in druge predmete, ki izkazujejo tragedijo tistega časa. Dokumentarni film, ki ga je spremljala tudi potujoča fotografska razstava in zemljevid požganih vasi, je bil predstavljen v lokalnih skupnostih (»požganih vaseh«) in predvajan na televiziji, otvoritvah spominskih plošč, filmskih festivalih, muzejskih razstavah in po šolah. Film je bil namenjen predvsem transgeneracijskemu prenašanju vednosti in spoznanj o skrajno travmatičnem času in možnih poteh iz njega (pričevanja, fotografije in dokumenti o uničenju domov, preživetju in povojni obnovi) v smislu dikcije: »Ne (več) naša generacija, mladi so naša prihodnost!« Ko zgodovinsko in/ali umetniško mišljenje razpre travmatične izkušnje, travma postane konstruktivna, ker se preteklost integrira v prihodnost. »Nikoli več« postane imperativ spomina in ne le preprosta lekcija preteklosti.

Spomeniki prihodnosti se glasi naslov projekta, ki ga je leta 2020 oživilo več slovenskih organizacij in društev v Italiji: Slovenska kulturno gospodarska zveza, Zveza slovenskih kulturnih društev, Narodna in študijska knjižnica s svojim odsekom za zgodovino in etnografijo ter Slovensko kulturno rekreacijsko društvo Jezero iz Doberdoba. Projekt je nastal z namenom, da promovira kulturno dediščino in temeljne vrednote upora proti fašizmu, ki so zaznamovale slovensko narodno skupnost v Furlaniji Julijski krajini in oblikujejo ključne elemente njene identitete (SKGZ, 2020–2022). Fokusiran je na ustvarjanje digitalne spominske krajine, ki beleži, posodablja in čim bolj popolno opisuje spominske kraje in spominska obeležja, ki so posvečeni žrtvam fašizma in nacizma in/ali simbolizirajo upor in osvoboditev. Projekt, ki je primerljiv z obsežnejšim, nekoliko pozneje vzpostavljenim avstrijskim državnim projektom DERLA

(Digitale Erinnerungslandschaft), ki je tesno povezan s programom ERINNERN:AT[19] in vključuje tudi spominske krajine in obeležja žrtev nacizma na dvojezičnem ozemlju Koroške (Danglmaier, 2024; Wutti & Danglmaier, 2024), je bil vzpostavljen v času pomembnih obletnic – 100. obletnice požiga Narodnega doma v Trstu (13. julija 2020), 90. obletnice ustrelitve štirih »bazoviških junakov« (6. septembra 2020), 80. obletnice ustanovitve Osvobodilne fronte slovenskega naroda (26. aprila 2021) in 80. obletnice ustrelitve »openskih junakov« (15. december 2021). V oblikovanje spletne strani so z zbiranjem fotografij, video- in zvočnih pričevanj in drugih informacij vključeni tudi mladi (koordinatorka projekta je Martina Budin, rojena leta 1996), kar pomeni, da ima projekt transgeneracijski značaj. Mlade Slovenke in Slovence v Italiji projekt privablja že iz razloga, ker je internet zanje v samem vrhu najbolj uporabljenih virov informacij (Vidau, 2018a, 65). Kar 83 % anketiranih mladih[20] iz vrst slovenske manjšine v Italiji – enak procentni delež pa tudi iz vrst slovenske manjšine v Avstriji (Piko-Rustia, 2018, 140) – je dejavnih v slovenskih kulturno-prosvetnih društvih, ustanovah in organizacijah (Vidau, 2018a, 68).

Opazna je tudi naravnanost mladih Slovenk in Slovencev v Italiji in Avstriji, ki izkazujejo afiniteto do vrednot Evropske unije, ki so izvorno zakoreninjene v izkušnji totalne vojne v prvi polovici 20. stoletja ter zloma fašizma in nacizma. Velik pomen pripisujejo zmanjševanju pomembnosti državnih meja, premagovanju nacionalizma, dialogu med večinsko in manjšinsko narodno skupnostjo in, povezano s tem, ustvarjanju ozračja miru v Evropi (Vidau, 2018b, 56–60; Obid, 2018, 102–105). Zaira Vidau pa je med nekaterimi mladimi Slovenkami in Slovenci v Italiji zaznala tudi »evroskepticizem«, ki pa to v svojem prvotnem in globljem bistvu pravzaprav ni, saj, kot je dejal mladi sedemnajstletni intervjuvanec, se je »na žalost rodil v obdobju, kjer Evropa že […] zgleda skoraj, da propada. […] in je to propadanje idealov in vsekakor nekega upanja v boljšo bodočnost« (Vidau, 2018b, 57). Propad evropskih idealov je zaznala tudi osemnajstletna intervjuvanka, ki se ji je po padcu Berlinskega zidu zdelo, »da bo Evropa res postala Evropa, neka skupnost, neka evropska unija«, zdaj pa se predvsem zaradi ponovnega zapiranja mej in širjenja rasizma ne počuti »več Evropejka« (Vidau, 2018b, 58). In dejansko je leta 2024 vzklila zavest, da se ne le v Italijo in Evropo, temveč tudi v kraje, kjer živijo Slovenke in Slovenci, vrača Mussolinijev duh, ki je spodbujal k rasističnemu sovraštvu in izbrisu »manjvrednih« narodnosti, prezirljivo imenovanih »allogeni« (tujerodni). Očitno tudi postaja, da v ospredje stopajo politike, ki implicitno perpetuirajo zlo, ki sta ga proizvedla fašizem in nacizem, na kar napeljuje tudi policijska racija na Peršmanovi domačiji.

Enajstega novembra 2024, slabih sto dni pred 8. februarjem 2025, ko sta Gorica in Nova Gorica (mesto Gorica je bilo po drugi svetovni vojni razdeljeno med Italijo in Slovenijo) uradno prevzeli naziv Evropske prestolnice kulture GO!25, je večina mestnega sveta Gorice z županom Rodolfom Ziberno na čelu zavrnila predlog svetnice Eleonore Sartori, da se fašističnemu diktatorju Mussoliniju odvzame naziv častnega meščana (Schmidt, 2024). Toda Gorica ni osamljen primer. Medtem ko je večina od približno 6.700 italijanskih občin, ki so Mussoliniju leta 1924 podelile naziv častnega občana, po padcu fašizma to odločitev preklicala (nekatere izmed njih šele pred kratkim), jih nekaj sto tega še vedno ni storilo (Schmidt, 2024). Še pred nedavnim, do 17. februarja 2025, je bil Mussolini častni občan mesta Salò, kjer je bila 23. septembra 1943 določena »vlada Mussolini« kot predstavnica marionetne fašistične Italijanske socialne republike v času nemške okupacije (Kemperle, 2025, 5).

Nenavadno se zdi, da Mussolini ostaja še naprej častni občan ne le v Gorici, ampak tudi v Trstu, Kopru in Piranu (Kemperle, 2025, 5; TGR, 2025) in mogoče tudi še v drugih krajih prostora Alpe-Jadran, ki je bil leta 1978 v Benetkah ustanovljen kot prostor ustvarjanja kulture dialoga in miru in nosi v sebi nauk konca druge svetovne vojne: otresti se grožnje, ki jo za človeštvo predstavljajo totalitarizem, genocid in povojno nasilje. Edinstvenost tega prostora je v tem, da si je že v času hladne vojne prizadeval za čezmejne stike ter za sodelovanje med ljudmi, regijami in državami različnih ideoloških, političnih in gospodarskih usmeritev. Tudi po padcu komunističnih režimov je alpsko-jadranski projekt predstavljal pomemben agens pri preoblikovanju konfliktov v nenasilno obliko. V tradicijo alpsko-jadranskega prostora se umeščata tudi projekta, katerih rezultati so izšli v knjigah *Kärnten liegt am Meer* (Koroška leži ob morju) (Petritsch et al., 2012) ter *Slovenija – Österreich: Befreiendes Erinnern – Osvobajajoče spominjanje* (Brousek et al., 2020). Enako velja za čezmejni projekt Evropske prestolnice kulture GO!25. V njegovem okviru so 9. maja 2025 – prav na dan Evrope ter ob praznovanju 80. obletnice konca druge svetovne vojne – v Gorici predvajali nov dokumentarni film ustvarjalne dvojice

19 ERINNERN:AT je program Avstrijske agencije za izobraževanje in internacionalizacijo OeAD za poučevanje in učenje o nacionalsocializmu in holokavstu, ki obstoja od leta 2000. Program ponuja izobraževanja za pedagoge in pedagoginje in gradivo za šolski in tudi zunajšolski pouk (OeAD erinnern, 2025). Koroški del programa vodi Nadja Danglmaier, ki izvaja številne raziskovalne programe na pedagoški fakulteti celovške univerze. Direktor programa Patrick Siegele je naznanil, da nameravajo na tej fakulteti vzpostaviti tečaj o kulturi spominjanja na Koroškem s težiščem na Peršmanovi domačiji. Predvidoma bo leta 2026 glavna tema erinnern:at preganjanje pripadnikov slovenske narodne skupnosti (Grilc, 2024).

20 Mišljeni so mladi pripadniki slovenskih manjšin, ki so bili anketirani v okviru triletnega raziskovalnega projekta *Mladi v slovenskem zamejstvu: družbeni in kulturni konteksti ter sodobni izzivi,* ki se je pod vodstvom Vere Kržišnik-Bukić izvajal med letoma 2013 in 2016 na Inštitutu za narodnostna vprašanja v Ljubljani.

Anje Medved in Nadje Velušček z naslovom *Ne pozabi me / Non ti scordar di me* (2025). Film je fokusiran na neizrečene družinske spomine, povezane z nasiljem in travmatičnimi izkušnjami v času druge svetovne vojne. »Šiva spomine« ljudi različnih pripadnosti, ki so živeli in živijo v obmejnem prostoru med Italijo in Slovenijo, in gradi »prizorišče skupni pripovedi« (Cukijati, 2025). Za projekt Evropske prestolnice kulture GO!25 je veljalo in velja, da je skušal in skuša preseči odločitev goriškega župana in večine občinskih svetnikov, da ostaja Mussolini častni meščan Gorice, in ugovarjati težnjam po kontinuiteti fašizma (Čepar, 2024). Predočuje pa tudi, da te težnje ne predstavljajo neke daljne, dokončane preteklosti, saj segajo tudi v sedanjost in prihodnost.

SKLEP

Za veliko večino zgoraj predstavljenih ali naštetih projektov – njihovi naslovniki ali izvajalci so zlasti pripadniki »generacije postmemorije« in širše mladi, v danem primeru mlade/i Slovenke in Slovenci v Avstriji in Italiji – je značilno, da si prizadevajo za oddaljitev od logike konfrontacije v smeri dialoškega spominjanja: priznavanja travmatičnih izkušenj drugih in širitev spomina tudi na področja, ki jih opredeljuje pojem *cona ranljivosti* (Buden, 2014, 92). Pojem napeljuje na komajda priznana ali potlačena zgodovinska dejstva, kar velja še zlasti za travmatska doživetja in njihov transgeneracijski prenos, in je tesno povezan s sodobno eksistencialno zaznavo občutja nezaščitenosti in obče človeške izpostavljenosti. Gre za izjemno kompleksno tematiko, ki se bolj kot na kognitivni odigrava na čustveni ravni, kar zgovorno ponazarjajo roman pisateljice Maje Haderlap *Angel pozabe* ter dokumentarni filmi Andrine Mračnikar, Anje Medved in Nadje Velušček. Nedvomno so, kot izhaja iz pričujoče razprave, prav omenjena literarna besedila in filmi, a tudi drugi umetniški proizvodi, znanstvena dela, sistematično ustvarjanje digitalnih spominskih krajin ter raznolika srečanja pomembno prispevali k ozaveščanju travmatičnih izkušenj v povezavi s fašističnim in nacističnim nasiljem in uporom Slovenk in Slovencev v Avstriji in Italiji. Čeprav v državah Evropske unije občutljivost na grozote fašizma in nacizma bledi in se soočajo s porastom fašističnih praks, se po drugi strani utrjuje in poglablja zavest, da sveta ne smejo sestavljati ideologije, ki se potrjujejo z bojevitimi nagnjenji do politične mogočnosti in osvajalske moči in/ali dajejo absolutno prednost naciji v smislu etnično homogene skupnosti in z njo povezanim idealom, za katerega je Étienne Balibar (2007, 21–41) uporabil izraz »*homo nationalis*«. V ospredje stopa tudi zavedanje, da je prihodnost Evrope in sveta v rokah otrok in mladih. O tem govorijo številni regionalno in čezmejno usmerjeni šolski in zunajšolski projekti, katerih glavni cilj je kljub poudarku na preteklosti in aktivnostim »proti pozabi« usmerjenost v »odprt vključujoč javni dialog« (Žagar, 2020), ki je pogoj za ustvarjanje poti v trajnostno, pravično in kar se da mirno prihodnost. Velik del v prispevku predstavljenih pobud, projektov in programov naglaša pomen človekove umeščenosti v specifičen prostor in čas, a tudi potrebo po preseganju »normalizatorske« funkcije meja, predvsem nacionalnih meja, državnih meja, a tudi skupnostnih, ideoloških in identitetnih meja. Prizadevajo si za omiljenje konfliktnih potencialov v osrčju slej ko prej žive preteklosti. Meja naj v tem smislu ne bi bila kraj, kjer se razlike stopnjujejo ali ločujejo, temveč kraj, kjer naj se še naprej priznavajo in spodbujajo k odprtosti v srečanju z drugim/i.

YOUTH AGAINST OBLIVION: BUILDING A CULTURE OF MEMORY AND DIALOGUE AMONG YOUNG SLOVENES IN AUSTRIA AND ITALY

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ABSTRACT

Drawing on data from media publications, websites of secondary schools, cultural and educational initiatives, programmes, and projects, as well as on author's own explorations and relevant scholarly debates, this article offers a theoretically grounded insight into the creation of a culture of memory and dialogue among young Slovenes in Austria and Italy over the past two decades. The study observes that the growing awareness of the passing of witnesses able to recount their often deeply traumatic experiences – particularly those related to Fascism and Nazism – has generated an urgent need to record and preserve the testimonies and memories of these "last witnesses". Young people, especially high school students, play an active role in this process. It is also important to note that descendants – often members of the generation of grandchildren – are increasingly taking responsibility for engaging with the historical events that shaped their ancestors and the wider Slovene national community to which they belong. They are active in literature, film – particularly artistically conceived documentary film (for example, Mila/Marija *by Andrina Mračnikar, a co-production between the public broadcasters ORF/Austria and RTV Slovenia, which portrays the history of Carinthian Slovenes' resistance against Nazism and features numerous young people as actors and participants) – and science. They address themes such as the transgenerational transmission of trauma, resistance, oblivion, and silence. Moreover, they contribute to the creation of digital "memory landscapes" and participate in a wide range of school and other cross-border and dialogue-oriented projects. Young Slovenes in Austria and Italy are increasingly aware that sensitivity to the horrors of Fascism and Nazism – both in their home countries and globally – is fading, and that it is therefore necessary to act "against oblivion".*

Keywords: young Slovenes in Austria, young Slovenes in Italy, culture of memory, dialogue, generation of postmemory

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SOCIOLOŠKE OVIRE V RAZVOJU EPISTEMOLOGIJE URBANEGA

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IZVLEČEK

Razvoj epistemologije urbanega zajema dve vplivni paradigmi: zgodnjo urbano sociologijo čikaške šole v začetku prejšnjega stoletja v Združenih državah Amerike in novo urbano sociologijo v drugi polovici stoletja v Evropi. Prispevek obravnava prevladujoči paradigmi in pri tem izpostavi ključne epistemološke ovire, ki so jih oblikovale družbenozgodovinske okoliščine in so preprečevale paradigmatski preboj. Analiza osrednjih del pokaže, kako je nova urbana sociologija presegla številne omejitve zgodnjega obdobja. Obravnava aktualnih dinamik ob krizi poddiscipline razkrije fragmentirano znanstveno produkcijo, razvrščeno v tri usmeritve, ter nakaže osnovo za nadaljnji razvoj epistemoloških orodij za preučevanje urbanega.

Ključne besede: urbana sociologija, epistemologija urbanega, čikaška šola, nova urbana sociologija, epistemološke ovire

OSTACOLI SOCIOLOGICI NELLO SVILUPPO DELL'EPISTEMOLOGIA DELL'URBANO

SINTESI

Lo sviluppo dell'epistemologia dell'urbano comprende due paradigmi influenti: la sociologia urbana delle origini, sviluppata dalla Scuola di Chicago all'inizio del XX secolo negli Stati Uniti, e la nuova sociologia urbana, affermatasi nella seconda metà del secolo in Europa. Questo contributo analizza entrambi i paradigmi dominanti, mettendo in evidenza i principali ostacoli epistemologici, determinati dalle circostanze storico-sociali, che hanno impedito un cambiamento paradigmatico. L'analisi delle opere principali dimostra come la nuova sociologia urbana abbia superato i limiti del primo periodo. La discussione delle dinamiche attuali nel contesto della crisi della sottodisciplina svela una produzione scientifica frammentata in tre orientamenti e propone le basi per un futuro sviluppo di strumenti epistemiologici per lo studio dell'urbano.

Parole chiave: sociologia urbana, epistemologia dell'urbano, Scuola di Chicago, nuova sociologia urbana, ostacoli epistemologici

UVOD: VEDNOST O URBANEM SKOZI PREMAGOVANJE OVIR[1]

Sociološko zanimanje za mesta je spodbudil niz procesov, ki so se od 18. stoletja naprej odvijali najprej v Evropi in kasneje tudi v ZDA (Združenih državah Amerike). Ključni med njimi so bili priseljevanje prebivalstva v mesta, industrializacija in z njo povezani razvoj mest, pa tudi spremljajoče hitre družbene spremembe. Z razmerjem med temi procesi in širšo družbeno ureditvijo so se sprva ukvarjali predvsem (socialni) filozofi, kasneje pa tudi zgodnji sociologi (Flanagan, 1993, 14–16). Engels (1969) je leta 1845 izdal delo *Položaj delavskega razreda v Angliji: po lastnem opazovanju in avtentičnih virih*, v katerem je natančno opisal prostorsko segregacijo v mestih, nečloveške bivalne pogoje in posledice industrijskega kapitalizma za mestno delavsko prebivalstvo. Tönnies (1999) je v leta 1887 izdanem delu *Skupnost in družba: temeljni pojmi čiste sociologije* pisal o družbeni spremembi, ki jo je razumel kot prehod od skupnosti, utemeljeni na tesnih, osebnih in dolgotrajnih družbenih vezeh v manjšem obsegu, k družbi, utemeljeni na ohlapnih, neosebnih družbenih vezeh v večjem obsegu. Durkheim (2013) pa je v letu 1893 prvič izdani *Delitvi dela v družbi* v kontekstu družbenih sprememb obravnaval prehod od mehanske solidarnosti, ki označuje mehanske sorodstvene vezi in povezanost znotraj manjših skupnosti, solidarnosti na osnovi podobnosti, k organski solidarnosti, ki je značilna za industrijsko družbo in ustvarja organske vezi, ki izhajajo iz naraščajoče družbene diferenciacije, do katere pride z delitvijo dela, torej k pogodbeni solidarnosti. Poleg navedenih je treba omeniti še Simmla (2000), ki je v svojih delih, kot je esej iz leta 1903 z naslovom *Velemesta in mentalitete*, preučeval, kako prehod v mestno življenje spremeni individualno mentaliteto od utemeljene na duševnosti in čustvenih odnosih do utemeljene na razumu ter prilagajanju. Navedeni avtorji so pomembni za urbano sociologijo, ki pa v tistem času še ni imela mesta na akademiji, torej še ni bila institucionalno priznana.

20. stoletje je zaznamovalo oblikovanje dveh vidnejših paradigm urbanega, ki sta neposredno povezani z vzpostavitvijo in razvojem urbane sociologije na akademski ravni. Začetek urbane sociologije se tako navadno umešča v zgodnje 20. stoletje na ameriška tla, in sicer pretežno pod delovanje t. i. čikaške šole (Gottdiener & Hutchinson, 2011, 58–69). Ta šola je prevladovala vse do 60-ih let, ko je prišlo do paradigmatskega obrata z oblikovanjem t. i. nove urbane sociologije predvsem na evropskih tleh (Gottdiener & Hutchinson, 2011, 80–82, 86–88). Za slednjo je sicer značilna večja teoretska raznolikost, pa vseeno obstaja jedrni niz idej, premis, vprašanj, ki so artikulirani v paradigmi, ki si stoji v nasprotju s čikaško šolo (Gottdiener & Feagin, 1988, 171), kar za kasnejše obravnave urbanega ne velja. Še več, aktualni teoretski prispevki urbane sociologije pogosto vključujejo izraze, kot je kriza v urbani sociologiji (Walton, 1993; Zukin, 1980).

Pogled na zgodovino epistemologije urbanega pokaže, da se ta razvija in v razvoju premaguje razne ovire. Če sledimo Bachelardu (2012, 13–20), razvoj mišljenja in s tem spoznavanja ne poteka brez epistemoloških ovir, kot denimo očitnih in neproblematiziranih prepričanj, ki nastopijo v mišljenju in vodijo v zmote. Odpravljanje zmot je namreč del procesa znanstvenega spoznavanja. Na tej osnovi lahko predvidevamo, da vsaka paradigma in teorija odražata družbenozgodovinske razmere in odnose, ki obenem pripomorejo k oblikovanju epistemoloških ovir, te pa nadaljnji razvoj ovirajo ali ga preprečujejo. Zapisano z Bourdieujem (2003, 143), sociologi niso nevtralni opazovalci družbenega sveta, torej tudi urbanega sveta, ampak v družbenem polju zavzemajo pozicijo. Zato je pri sociologiji tako zelo pomembna ravno »sociološka analiza proizvodnje proizvajalca«. Pojasnjevanje ovir v kontekstu umeščenosti v prostor in čas tako pripomore ne le k večjemu razumevanju pojavnosti izpostavljenih paradigm, ampak potencialno tudi oz. predvsem k potrebnemu – kot bomo videli proti koncu prispevka – premiku v razvoju novih teoretskih in metodoloških orodij sodobne urbane sociologije.

Namen pričujočega prispevka je podrobneje raziskati epistemologijo urbanega, ki je povezana z nastankom in razvojem urbane sociologije predvsem v ZDA in Evropi. Cilj je poiskati in razumeti epistemološke ovire, ki so momentalno onemogočale nadaljnji razvoj urbane sociologije oz. v tej smeri še vedno delujejo. V tem okviru smo si zastavili dve raziskovalni vprašanji in z odgovoroma nanju doprinašamo k sociologiji. Prvič, zanima nas, s katerimi ključnimi ovirami se je soočala oz. se sooča posamezna urbana paradigma, in drugič, kako različne družbenozgodovinske razmere vzpostavljajo oz. razvijajo urbane paradigme in teorije ter obenem doprinašajo k izoblikovanju ovir ali premoščanju ovir svoje predhodnice.

Za doseganje raziskovalnih ugotovitev bomo pozorno analizirali dela značilnih predstavnikov ter predstavnic urbane sociologije. Z analizo posameznih del bomo prišli do ključnih epistemoloških ovir, ki so onemogočale paradigmatski preboj in so del vsake paradigme. Obenem bomo preučili družbenozgodovinske okoliščine nastanka in razvoja teh vidnejših paradigm ter njihovih ovir, ki so predstavljale podlago za uspeh prevladujoče paradigme, ki je

1 Avtorica se zahvaljuje izr. prof. dr. Primožu Krašovcu za branje prvega osnutka članka ter za vsebinske komentarje. Zahvaljuje se tudi anonimnima recenzentoma za konstruktivne pripombe, ki so prispevale k izboljšanju besedila. Za morebitne preostale napake in pomanjkljivosti je odgovorna izključno avtorica.

sledila predhodni. Nazadnje bomo polje urbane sociologije še aktualizirali in si pri tem prizadevali priti do boljšega razumevanja omejitev sodobnih urbanih teorij v sociologiji in njenih potencialnih priložnosti v prihodnosti.

Pridobljene ugotovitve bodo pomembne za presvežitev obstoječe vednosti o epistemologiji urbanega, ki je povezana z razvojem urbane sociologije, saj z novim pogledom, torej s perspektivo epistemoloških ovir in refleksivne sociološke prakse, prispevajo k novemu pogledu na raziskovanje urbanega. Prav tako izzivajo aktualno vednost na način, da omogočajo bolj strukturiran pogled na razvoj sodobnih urbanih teorij in zgoščajo ugotovitve o tem, katere premike je pomembno ubrati za nadaljnji razvoj epistemologije urbanega.

ČIKAŠKA ŠOLA IN VZPOSTAVITEV URBANE SOCIOLOGIJE

Začetek preučevanja urbanega se v sociologiji navadno umešča pod delovanje čikaške šole. Prvi oddelek za sociologijo v ZDA je leta 1892 ustanovil Albion W. Small na Univerzi v Čikagu, Robert E. Park, pomemben predstavnik šole, pa se je oddelku pridružil leta 1914. Oba sta v času, ko sta bila še podiplomska študenta, obiskala Nemčijo, kjer sta poslušala Simmlova predavanja, ki je videl mesto predvsem s kulturnega vidika in pisal o tem, kako je življenje v mestih spremenilo, kako razmišljamo in delujemo, ter o interakcijah znotraj mestnega prostora. To interakcionistično perspektivo sta Small in Park ob vrnitvi v ZDA prenesla na sociološki oddelek Univerze v Čikagu in jo tam prilagodila v sklopu svojega ukvarjanja z družbeno organizacijo v mestih, kar je imelo vpliv tudi na poznejše predstavnike čikaške šole, ter tako ustanovila urbano sociologijo (Gottdiener & Hutchinson, 2011, 49–52).

Prispevki čikaške šole urbane sociologije so produkt specifičnih družbenozgodovinskih okoliščinih iz začetka 20. stoletja. V tem obdobju so se v ZDA, zlasti v Čikagu, začele intenzivne družbene spremembe, povezane z industrializacijo, migracijami in urbanizacijo. Med letoma 1880 in 1930 je Čikago doživel pospešeno rast, ki je preoblikovala mestno življenje, družbeno strukturo in prostorsko organizacijo (Bulmer, 1984, 12–13). V tem času je čikaška šola razvila prvi institucionalni pristop urbane sociologije, kjer je bil pomemben predvsem okvir družbene ekologije (Gottdiener & Hutchinson, 2011, 72). Na temelju takratnih vplivov darvinističnih teorij o boju za preživetje, ki so ponujale osrednji motiv za razumevanje mesta kot ekološkega sistema, kjer so družbene skupine tekmovale za preživetje in prilagoditev na urbano okolje (Gottdiener & Hutchinson, 2011, 60–61), so predstavniki skušali razumeti mesto kot organizem, ki se širi in razvija po zakonitostih naravnega izbora in ekološkega nasledstva, pri čemer so pogosto v družboslovje prenesli pojme iz naravoslovja.

Park (1915, 578) v temeljnem prispevku urbane sociologije iz leta 1915 *Mesto: predlogi za preučevanje človeškega vedenja v mestnem okolju* navede, da je mesto »zakoreninjeno v navadah in običajih ljudi, ki ga naselijo«. Mestni načrti določajo gradnjo in ureditev urbanih predelov ter s tem v nekem obsegu omejujejo prostor, a v okviru teh omejitev »se neizogibni procesi človeške narave nadaljujejo in dajejo tem regijam in zgradbam značaj, ki ga je težje nadzorovati« (Park, 1915, 579). Tako si urbano prebivalstvo na podlagi svojih preferenc, interesov, želja in okusov izbere, v katerih predelih in kako bo živelo, s čimer se v mestu samorazporedi (Park, 1915, 579). S priseljevanjem v velika mesta – kar so v začetku 20. stoletja v Čikagu opazovali predstavniki čikaške šole urbane sociologije (Gottdiener & Hutchinson 2011, 99–100) – pride do stika različnih kultur, kar pomembno vpliva na družbene odnose, ki so bili do tedaj vajeni delovanja znotraj manjših skupnosti, pri katerih sta obstajala večje medsebojno poznavanje in trajnost vezi (Park, 1915, 607–608). Po razumevanju Parka se posamezne predele mesta poseljuje po logiki, ki izhaja iz narave individuuma, kar je razlog za segregacijo v mestih, da torej mesto postane »mozaik manjših svetov, ki se dotikajo, a ne prepletajo« (Park, 1915, 608). V ločenih mestnih predelih ima vsak predel svoje značilnosti, ki se v povezovanju z drugimi iz istega predela na podlagi dajanja moralne podpore le še utrjujejo. Ta logika razumevanja mesta privede do videnja mesta kot odličnega laboratorija ali klinike za preučevanje človeške narave ter družbenih procesov (Park, 1915, 610–612).

Park je leta 1925 skupaj z Ernestom W. Burgessom izdal delo *Mesto*, v katerem se skozi razne prispevke predstavi model urbane rasti, ki je utemeljen na biološko izpeljanih načelih in preveden v urbano družbeno okolje (cf. Park & Burgess, 1967). E. W. Burgess (1967) v enem prispevku znotraj tega dela piše o tem, da je treba gledati na širitev mesta kot na proces (Burgess, 1967, 48). Za olajšano razumevanje mest uvede serijo koncentričnih krogov, s katerimi v posameznem mestu označi napredne predele urbane širitve in območja, ki se ne širijo. Črpa iz ekologije rastlin in uporabi izraz nasledstva ter z njim opiše težnjo predela, da se širi z invazijo v drug, sosednji predel znotraj mesta (Burgess, 1967, 50). Proces širitve mestnih predelov pa spreminja družbeno organizacijo: če družbena organizacija in dezorganizacija predstavljata procese metabolizma v telesu, je urbana rast rezultat organizacije in dezorganizacije (Burgess, 1967, 53). Ko pišemo o tem, da mesto raste, in raste zaradi pritiska prebivalstva, sta torej na delu organizacija in dezorganizacija v vzajemnem odnosu, pri čemer dezorganizacija ni nekaj patološkega, temveč gre za reorganizacijo odnosov in ravnanj, ki lahko naredi prilagoditev urbanemu okolju bolj učinkovito (Burgess, 1967, 53–54). Skladno s pisanjem Burgessa različne družbene skupine, ki se

razvrstijo v posamezne predele mest, mesto označijo in te značilnosti potem spodbujajo razvoj v enih predelih in omejujejo v drugih (Burgess, 1967, 56–57). Mobilnost pomeni spremembo in hkrati spodbuja odziv osebe na okolje, kar – podobno kot pri fizičnih organizmih – omogoča rast. Ta odziv je zdrav, če je usklajen s celotno osebnostjo, patološki pa, če je od nje razcepljen (Burgess, 1967, 58–59). Območja demoralizacije nastajajo v urbanih okoljih z večjo mobilnostjo, kjer se primarni nadzor družbenih vezi poruši (Burgess, 1967, 59).

Še en pomemben predstavnik čikaške šole Roderick D. McKenzie (1967a, 63–64) je družbeno ekologijo opredelil kot študij prostorskih in časovnih odnosov med ljudmi, ki nastanejo s konkurenco in selekcijo ter so vseskozi v procesu spreminjanja. Tudi ta pisec v svoji razpravi uporablja analogijo ekologije rastlin, ki v raziskovanju rastlin obravnava vplive boja za prostor, hrano in svetlobo, ter trdi, da podobni procesi potekajo tudi pri oblikovanju velikosti in organiziranju človeških skupnosti. V sklopu primerjave rastlinskih in živalskih organizmov McKenzie izpostavi, da imajo živalski organizmi, kamor šteje tudi ljudi, zmožnost gibanja – torej lahko sami izberejo svoj življenjski prostor –, medtem ko rastline tega nimajo. Človeški organizmi pa imajo še dodatno zmožnost ustvarjalnosti, s pomočjo katere okolje prilagodijo svojim potrebam, kar omogoča, da lahko izberejo in nadzorujejo pogoje svojega življenjskega prostora (McKenzie, 1967a, 64–65). Temeljni dejavnik sprememb prostorskih vzorcev v urbani družbi pa so tehnološke spremembe ter inovacije. McKenzie (1967b, 69–71, 81–83) v knjigi *Metropolitanska skupnost* obravnava razvoj urbanih predelov skozi perspektivo tehnoloških sprememb, zlasti na področju prevoza in komunikacije, ki so spreminjale oblike družbene organizacije in vplivale na prostorsko širitev mest.

Obravnava ključnih predstavnikov urbane sociologije čikaške šole ne more iti mimo Luisa Wirtha. Njegova življenjska pot se je začela v Nemčiji, kjer ga je – ravno tako kot tudi že omenjena Small in Park – navdušil Simmel, nato pa je po preselitvi v ZDA postal član sociološkega oddelka na Univerzi v Čikagu (Gottdiener & Hutchinson, 2011, 56). Wirtha (1938) je v raziskovanju zanimalo, kako mesto producira »urbani način življenja«. Urbano kulturo razume kot odvisno spremenljivko, na katero vplivajo trije pomembni dejavniki, in to so velikost, gostota in heterogenost. Na urbanost kot način življenja torej gleda kot na produkt velikega števila prebivalstva, za katero so značilni manko osebnih vezi, anonimnost in prehodnost odnosov, gostote prebivalstva, ki zajema kompleksen vzorec segregacije, in heterogenosti prebivalstva, ki deluje razdiralno za toge družbene strukture in nestabilno (Wirth, 1938, 9–10). Skladno z navedenim je na osnovi teh treh spremenljivk mogoče določiti značilnosti urbanega življenja in jih primerjati med mesti različnih velikosti ter tipov (Wirth, 1938, 18). Podobno kot predhodno obravnavani misleci vidi izjemen potencial ravno v tehnoloških spremembah, ki bodo transformirale mesto in pripomogle k razvoju urbanega okolja (Wirth, 1938, 24).

Obravnava del urbane sociologije iz prve polovice 20. stoletja pokaže, da je zgodnja urbana sociologija čikaške šole, ki je institucionalno gledano prva urbana sociologija, v svojo obravnavo urbanega uvedla interakcionistično perspektivo, pri tem pa trčila na ovire, ki so omejevale celovito in neobremenjeno razumevanje urbanih procesov. Prvič, ker je zanemarila vpliv družbene strukture, načina produkcije in vloge države pri tem, je poenostavila kompleksnost urbane realnosti in razvoja (Gottdiener & Hutchinson, 2011, 65; Zukin, 1980, 576–577). Z osredotočanjem na mikro nivo je bila denimo segregacija v mestih razumljena v luči individualnih odločitev, ne pa družbenih neenakosti. Drugič, v urbanih procesih, to je predvsem urbanosti, ki pomeni enotnost urbanega védenja in prepričanj, in urbanizacije, ki pomeni gibanje ljudi in dejavnosti ter prostorskih oblik v procesu, je našla univerzalne značilnosti sprememb, ki se razumejo kot nekaj naravnega in neizogibnega (Zukin, 1980, 575–576), pri čemer je izpustila kaotičnost in manjšo predvidljivost procesov, kar je še ena epistemološka ovira, ki je zgodnji urbani sociologiji onemogočala premik naprej. Tretjič, v duhu časa je z izposojo izrazov iz biologije mesto videla kot organizem in načela iz biologije (npr. konkurenca, selekcija, nasledstvo) prenašala v urbani prostor. Kot navedeta Gottdiener & Hutchinson (2011, 60–61), taka perspektiva privede do razumevanja urbanega življenja kot procesa prilagajanja družbenih skupin urbanemu okolju. Priselitve v mesta razdrejo osebne vezi in spodbujajo prilagoditev: bolj prilagojeni so bolj uspešni in manj prilagojeni so manj uspešni, kar lahko v nadaljevanju privede do dezorganiziranosti in nastanka patologij. Po takem razumevanju pa se zanemari druge makro dejavnike, ki oblikujejo urbani prostor. Četrtič, osredotočanje na kvantitativne dejavnike pri opredeljevanju urbanega, kot so velikost, gostota in heterogenost mest, zanemari kvalitativne dejavnike, kot so družbena razmerja in neenakosti, kar omogoča le delno razumevanje urbanih pojavov. Petič, urbana sociologija čikaške šole s poudarjanjem individualnih preferenc zmanjšuje pomen prostora, saj se prostorski odnosi obravnavajo kot posledica družbenih procesov, ne pa kot samostojen dejavnik, kar omejuje razumevanje, kako prostor oblikuje družbene odnose (cf. Hillier, 2008, 221–224). Čikaška šola je torej oblikovala pomemben in vpliven teoretski okvir zgodnje urbane sociologije, a zaradi epistemoloških ovir, ki so bile značilne za njen čas, ni uspela prepoznati kompleksnosti in celostne dinamike urbanih struktur, kar je omejevalo njen razvoj.

PRELOM Z NOVO URBANO SOCIOLOGIJO

Za pozna šestdeseta leta 20. stoletja je značilna družbena kriza, ki se je izražala skozi nemire in politično mobilizacijo prebivalstva v navezavi na različne družbene neenakosti, ki so bile do tedaj nenaslovljene, kot so npr. razred, spol in rasa. V kriznem obdobju se paradigma družbene organizacije, ki je bila uporabna v obdobju migracij in prilagoditev v mestih ter urbane rasti in segregacije, ni dobro izkazala, saj ni bila sposobna odgovoriti na vprašanja naraščajočih in zaostrujočih se problemov v družbi (Walton, 1993, 301–302), s čimer je vodila v »skoraj popolno intelektualno paralizo« (Zukin, 1980, 577).

Nastali problemi so privedli do tega, da so državni uradi npr. v Franciji povečevali sredstva za urbane študije, pri tem pa so bile v ospredju teme, kot so urbana prenova, delovanje kazenskopravnega sistema in socialna varnost (Zukin, 1980, 577). Naraščajoči nemiri na ulicah, ki so se interpretirali kot »urbane motnje«, so tako k raziskovanju pritegnili različne družboslovne znanosti. Tako sami dogodki kot zagotovljena finančna podpora sta zagnala kritično ukvarjanje z urbanim, pri čemer je bilo še posebej močno apliciranje historičnega materializma v urbano sociologijo (Pickvance, 1976, 1–2). V razpršitvi polja ukvarjanj z urbanim se je obenem pojavila težnja k uskladitvi. Urbano sociologijo so z določitvijo temeljnih konceptov poskušali dvigniti na raven znanstvenega prizadevanja, pri tem pa so se opirali na Marxa in s tem naredili prostor za političnoekonomske uvide, ki jih do takrat ni bilo na vidiku (Zukin, 1980, 578–579). Nastala je »nova urbana sociologija«, kar je izraz, ki ga je po presoji Johna Waltona (1993, 302) leta 1980 prvič uporabila Sharon Zukin (1980) in s tem poimenovala prelom v urbani sociologiji. Ta še posebej jasno označuje začetek ukvarjanja s tem, kako mesta krepijo, posredujejo in artikulirajo protislovja produkcijskih načinov, še posebej kapitalističnega produkcijskega načina (Zukin, 1980, 583).

Kot navaja Walton (1993, 302), je leta 1968 Manuel Castells v Franciji objavil članek, v katerem se že v provokativno zastavljenem naslovu vpraša, ali sploh obstaja urbana sociologija. Ta članek je dosegel bralstvo v omejenem obsegu, vse dokler se ni pisec preselil v ZDA, kjer je opravljal delo profesorja na Univerzi v Wisconsinu, in ni s pomočjo Pickvanca (1976) v Združenem kraljestvu izdal angleškega prevoda članka, in sicer v delu *Urbana sociologija: kritični eseji*. Castells (1976a; 1976b) si v dveh prispevkih znotraj tega dela prizadeva izpostaviti in obravnavati probleme dotedanje urbane sociologije in z usmerjanjem pozornosti na opredelitev objekta analize vzpostaviti znanstveni status urbane sociologije. V svoji obravnavi začne z razmislekom, da so redke discipline odvisne od partikularne teoretske šole, kot je bila do tedaj urbana sociologija dominirana s strani čikaške šole (Castells, 1976a, 36). Pravi, da »urbana sociologija je ideologija« in si nadalje prizadeva opredeliti njeno družbeno funkcijo (Castells, 1976b, 60).

Castells je kritičen do pojma urbanosti, osrednjega v pristopih čikaške šole (Walton, 1993, 304). Urbanost kot sistem vrednot kapitalistične družbe in modernosti je partikularen kulturni tip, za katerega se predpostavlja, da ga bodo posvojile vse družbe v razvoju, zato ne more biti teoretski objekt znanstvene discipline. Prav v tem prepoznava ideološkost urbane sociologije – urbanost ni koncept, saj ideološko pripoveduje o človeški zgodovini (Castells, 1976b, 68–70). Zato predlaga opustitev pojmov, kot sta urbano vedênje in urbana stališča, saj implicitno temeljijo na ločevanju med urbanim in ruralnim (Castells, 1976a, 54), kar pa je zavajajoče, saj z urbanizacijo urbana sociologija izgubi predmet in postane splošna sociologija (Castells, 1976a, 56). Castells nadalje kritizira obravnavo urbanizacije in organizacije prostora, ki ju vidi kot historična procesa. Organizacija urbanega prostora nima lastnega teoretskega objekta, saj vključuje odnose, ki so del širšega družbenega sistema. Tako je urbana stratifikacija zgolj del splošne družbene stratifikacije in ne zahteva posebnih teoretskih orodij (Castells, 1976b, 71). Urbana sociologija po Castellsu nima ne posebnega teoretskega ne realnega objekta: urbano kot »način življenja« ne more biti osnova razlikovanja od ruralnega in s tem ne samostojna poddisciplina (Castells, 1976b, 73–74).

Castells poudari, da mora teoretska opredelitev področja nastopiti pred konkretnim raziskovanjem, saj v nasprotnem primeru veda nima znanstvene vrednosti. Nedoločenost teoretskega predmeta namreč vpliva na nedoločenost znanstvene vloge urbane sociologije, kar je v nasprotju z avtorjevimi prizadevanji. Na drugi strani pa trdi, da je bila do sedaj politična vloga sociologije precej jasna in enotna, in sicer v načrtovanju mehanizmov prilagajanja, regulacije in razreševanja nasprotij, in točno v tem prepozna njeno ideološko funkcijo (Castells, 1976b, 83). Pristop torej v nasprotju s pristopom čikaške šole izrazito poudarja družbeno strukturo, ki oblikuje mesta, ne obravnava pa, kako posamezniki oz. posameznice in skupnosti oblikujejo mesta, ter kaj se dogaja na ravni mikro družbenih interakcij.

Po prelomu je pomembno vlogo pri teoretiziranju urbanega imel tudi Henri Lefebvre. Ta v svojem delu *Produkcija prostora* (Lefebvre, 2013, 47) opredeli prostor kot družbeni produkt, s čimer naredi odmik od pojmovanja urbanega prostora s strani čikaške šole, ki je dala v ospredje enotno in univerzalno formo. Produkcijo prostora vidi kot proces (Lefebvre, 2013, 55), kar spremeni fokus analize urbanega

od analize stvari v prostoru k potekajoči produkciji prostora (Lefebvre, 2013, 58). Z odpiranjem tega pogleda pa ne moremo mimo zanimanja za zgodovino prostora, njegovih form in reprezentacij (Lefebvre, 2013, 69). Zaradi procesualne narave prostora se v analizi ne moremo ukvarjati zgolj s posebnim momentom urbanega, temveč vedno tudi s širšimi aspekti načinov (re)produkcije, ki so značilni za posamezne družbe (Lefebvre, 2013, 71).

Temu ustrezno vsaka družba producira svoj prostor, v katerem se prepletajo odnosi produkcije in reprodukcije (Lefebvre, 2013, 52–53). Kapitalistični produkcijski način proizvede abstraktni prostor, to je prostor, ki teži k homogenosti in odpravljanju medsebojnih razlik (Lefebvre, 2013, 72–76). Abstraktni prostor je tudi instrumentalen, kar pomeni, da je manipuliran z avtoritetami, okolje katerih je, in podprt z nekritično vednostjo. Prebivalstvo pa uporablja prostor kot prostor za življenje. Lefebvre se sprašuje, zakaj se ljudje ne uprejo manipulacijam prostora in se pustijo biti vodeni na načine, ki jim ne izboljšajo življenja v mestih (Lefebvre, 2013, 74–75). Obenem trdi, da bo abstraktni prostor porodil diferencialni prostor, ki – za razliko od abstraktnega prostora – poudarja ravno razlike (Lefebvre, 2013, 76).

S tem pridemo do izraza, ki ga je Lefebvre popularizira že v naslovu enega svojih osrednjih del – pravica do mesta (Marcuse, 2009, 189), ki pomeni prenovljeno pravico do urbanega življenja. Lefebvre je analiziral učinke kapitalističnega načina produkcije na urbano okolje ter družbene interakcije razumel skozi to perspektivo (Lefebvre, 2000, 66). Še več, urbano načrtovanje je videl kot ideologijo, ki preoblikuje družbene probleme v prostorska vprašanja (Lefebvre, 2000, 98–99). Rešitev je videl v tem, da delavski razred z družbeno in politično aktivnostjo prevzame nadzor nad načrtovanjem in prispeva k uresničitvi urbane družbe (Lefebvre, 2000, 179–180). Kritična urbana teorija, zavezana pravici do mesta, od takrat naprej želi podpreti kritično urbano prakso s prepoznavanjem virov prikrajšanosti, oblikovanjem predlogov in njihovim političnim uveljavljanjem – skladno z geslom »Izpostavi, predlagaj, politiziraj« (Marcuse, 2009, 194–196). Spodbude prebivalstva k intervencijam kot pomemben element produkcije prostora že kažejo na to, da se delo lahko bere kot neke vrste manifest.

Upoštevati je treba tudi Johna R. Logana & Harveya L. Molotcha (1987), ki sta v delu *Urbane usode: politična ekonomija prostora* obravnavala, kako oblast, politična organizacija in ekonomske sile (pre)oblikujejo urbane prostore, s čimer sta dala velik poudarek družbeni strukturi. Mesta sta analizirala kot stroje rasti, ki v prizadevanju za menjalno vrednost in rast delujejo kot podjetja (Logan & Molotch, 1987, 50–52) ter – čeprav poudarjajo prednosti za celotno prebivalstvo – zanemarjajo družbene učinke v obliki nenakomerno porazdeljenih negativnih posledic, ki jih povzroča rast (Logan & Molotch, 1987, 85, 94–95).

Urbana paradigma, kot jo predstavijo dela nove urbane sociologije, pomeni prelom z dotedanjo paradigmo. Ta je presegla nekatere ovire zgodnje urbane sociologije, a obenem vzpostavila nove. Prvič, nova urbana sociologija se osredotoča na vpetost prostora zlasti v kapitalistični produkcijski sistem, kar ji omogoča boljše razumevanje določenih družbenih struktur, ki jih je predhodnica zanemarila. Vendar pa nekaterih drugih kompleksnosti urbanega življenja, kot so etničnost in spol, ter delovanja individuumov ne obravnava v zadostni meri (Walton, 1993, 318). Drugič, dotedanjo urbano sociologijo označi za ideološko, saj ta urbanih vprašanj ne obravnava kot historično specifičnih. Poskuša dvigniti nivo znanstvenosti urbane sociologije, a kljub poskusom opredeljevanja svojega predmeta ni prišla do zaključka o tem, kaj točno je predmet te poddiscipline. Tretjič, za razliko od prejšnjih pristopov nova urbana sociologija politizira prostor, kar ji podeli politične implikacije. Spreminjanje urbanega je povezano z oblikovanjem novega akterja sprememb – prebivalstvom mest, kar lahko povežemo z vzporednimi in prepletajočimi se spremembami v urbanem načrtovanju, ki je v tistem času vse bolj postavljalo v ospredje pomen stališč prebivalstva (cf. Hall, 2014, 400; Taylor, 1998, 161–162). Nova urbana sociologija pogosto vidi razredni boj na mestih, kjer so drugi interesi pomembnejši, tako lahko vidi družbene skupine kot protikapitalistične upornike in upornice v urbanem raju (Zukin, 1980, 598). Četrtič, čeprav se je v času nove urbane sociologije vse več disciplin pričelo ukvarjati z urbanim, tej poddisciplini ne moremo pripisati interdisciplinarnosti. Morda je to posledica njenega prizadevanja, da bi postala bolj znanstvena, četudi bi ji interdisciplinarni pristop potencialno omogočil celovitejše razumevanje urbanih problemov. Petič, nova urbana sociologija še vedno marginalizira vlogo prostora (Hillier, 2008, 221–224; Mlinar, 1990, 9), vendar v tem primeru zaradi poudarjanja družbenih struktur. To pomeni, da pogosto ne nameni dovolj pozornosti fizični zasnovi mest in vplivu, ki ga ima ta na družbene procese. Ali je novo urbano sociologijo že nasledila nova paradigma, ki bi premostila izpostavljene ovire, pa bomo razdelali v nadaljevanju.

KRIZA SODOBNE URBANE SOCIOLOGIJE

Nova urbana sociologija je bila vplivna vse do začetka 80-ih let 20. stoletja, nato pa se ni razvila nova prevladujoča paradigma. Področje urbane sociologije se je postopoma razpršilo in pri tem izgubilo enoten teoretski okvir. Eden od razlogov

so naraščajoči družbeni izzivi, kot so globalizacija, digitalizacija in podnebne spremembe, ki zahtevajo nove epistemološke pristope, ki segajo prek okvira zgodnje in nove urbane sociologije. Te izzive prepoznamo tudi v aktualnih mednarodnih razvojnih strategijah, denimo v *Agendi 2030 za trajnostni razvoj* Združenih narodov (2015, 14) in *Urbani agendi za EU*, sprejeti z Amsterdamskim paktom (Evropska komisija, 2016). Mednarodno, evropsko in tudi državno financiranje slednje podpira s sredstvi za reševanje konkretnih problemov v mestih in izvajanjem predvsem aplikativnih raziskav. Vzporedno z omenjenimi družbenimi izzivi se je v zadnjih desetletjih okrepila tudi tekmovalnost med disciplinami, ki preučujejo urbano. Tehnološke in naravoslovne vede – zlasti računalništvo, geoinformatika in inženirstvo – urbano obravnavajo kot problem optimizacije, pri čemer pogosto prezrejo družbenost procesov, na katere opozarja sociologija. Navedeno ustvarja epistemološke napetosti in prispeva k temu, da druge discipline prevzemajo del raziskovalnega prostora urbane sociologije (May et al., 2005, 345–347).

V tem kontekstu današnja urbana sociologija vključuje številne teoretske, empirične in aplikativne pristope, ki se osredotočajo na različne vidike urbanega življenja in pri tem uporabljajo različne metode. Ta raznolikost se v zadnjih desetletjih kaže v treh glavnih usmeritvah: prva snuje nova pojmovanja mest, druga nadalje razvija novo urbano sociologijo kot kritično urbano sociologijo, tretja pa presega dosedanje okvire z redefiniranjem polja urbane sociologije ali prehodom na nova raziskovalna polja.

Nova pojmovanja mest

Castells (2002, 11), ki smo ga v prejšnjem poglavju obravnavali kot predstavnika nove urbane sociologije, na začetku novega tisočletja ugotavlja, da ta paradigma v kontekstu informacijsko-komunikacijskih tehnologij, stalnih migracij ter raznolikih identitet in kultur postaja zastarela. Urbana sociologija zato potrebuje nova teoretska in metodološka orodja za razumevanje spremenjene urbane realnosti. V *Vzponu omrežne družbe* (Castells, 2010), prvotno objavljenem leta 1996, avtor uvede pojem omrežna družba kot novo obliko družbe, oblikovano konec prejšnjega stoletja. Dimenzije družbene organizacije in družbene prakse so namreč sestavljene iz omrežij, te pa se od starih omrežij razlikujejo po tem, da omogočajo neskončno ekspanzijo in rekonfiguracijo, ki sega čez mestne in nacionalne meje (Castells, 2010, xviii). V tem okviru fizični prostor mesta nadomeščajo digitalna omrežja in informacijski tokovi. Castells uvede pojem prostor tokov, kjer mesta delujejo kot vozlišča globalnih tokov (Castells, 2010, 441–442), s čimer se preoblikujejo v procesna, informacijska mesta, ki jih strukturno določa prav ta prostor tokov (Castells, 2010, 429).

Saskia Sassen (2000; 2006) ugotavlja, da so bile urbane študije v prvi polovici 20. stoletja osrednje v sociologiji, a so pozneje to vlogo izgubile. V urbani sociologiji 21. stoletja prepoznava potencial, da lahko slednja zopet zavzame to posebno pozicijo. Sodobni trendi – kot so globalizacija, razvoj tehnologij, intenzifikacija transnacionalnih in translokalnih dinamik ter okrepitev družbene raznolikosti –, se materializirajo in medsebojno prepletajo ravno v mestu, ki postaja »strateški prostor« za njihovo analizo. Ker mesto ni več zamejena enota, temveč »vozlišče v mreži procesov, ki presegajo meje«, je treba te trende raziskovati lokalno – v mestih, pri čemer namiguje na uporabo metod, ki jih je inspirirala čikaška šola (Sassen, 2000, 146–147). Ključni koncept, ki ga vpelje v sociologijo, je globalno mesto, s katerim izpostavi vpliv globalizacije, zlasti ekonomskega prestrukturiranja, na urbano življenje ter obenem zmanjševanja vpliva nacionalnih držav (Sassen, 2001). Mesta se namreč od 1980-ih naprej, ko jih je spodbudila razširitev globalnih trgov in sprostitev tujih investicij, vse bolj osredotočajo na strategije rasti. V konkurenci z drugimi mesti poskušajo pridobiti prednost, s čimer rušijo dolgotrajne hierarhije, utemeljene na velikosti mest, a obenem ustvarjajo nove neenakosti. Uspešnost mesta je sedaj odvisna od implementacije globalne dinamike in prilagoditve nanjo (Sassen, 2006, 480–483).

Kritična urbana sociologija

Kritična urbana sociologija temelji na novi urbani sociologiji, ki jo nadgrajuje, mestoma pa tudi preseže. Neil Brenner (2009, 198) pravi, da kritično urbano teorijo povezuje prepričanje, da mesta ne nastajajo po transhistoričnih zakonih družbene organizacije – kot je menila čikaška šola – temveč se nenehno (re)konstruirajo glede na zgodovinsko specifična razmerja vednosti in oblasti. Kritična urbana teorija tako analizira urbane ideologije in oblasti, zavrača ideološko posredovane forme urbanih analiz in se osredotoča na iskanje alternativnih, emancipatornih oblik urbanega. Ker kapitalistična urbanizacija deluje kot proces »kreativne destrukcije«, ki neprestano spreminja urbano in načine bivanja, je naloga kritične urbane teorije v nenehnem vzpostavljanju refleksivnega odnosa do teh transformacij in konfliktov – ravno v tem se kaže njen kritični naboj (Brenner, 2009, 204). Ena ključnih Brennerjevih intervencij pa je povezana z njegovim manj urbanim in bolj prostorskim razumevanjem teritorialne organiziranosti sodobne družbe, ki ni

več zasnovana na stalnih in zamejenih enotah, kot npr. na nacionalni državi, temveč na dinamičnih in relacijsko prepletenih konfiguracijah, ki delujejo na več ravneh hkrati (Brenner, 2004). Temu ustrezno zavrne urbano kot statično in univerzalno formo (saj urbano ni inherentna lastnost mesta), kot tip naselja (saj so klasične tipologije izgubile na uporabnosti) in kot zamejeno teritorialno enoto (npr. z mestnimi mejami, saj te prehaja). V razmerah planetarne urbanizacije urbano razume kot proces, ki nenehno preoblikuje in rekonfigurira geografije (Brenner & Schmid, 2015, 165–166), kar predstavlja pomemben refleksivni epistemološki premik v razumevanju urbanega.

Sharon Zukin (2011) se pri preizpraševanju urbane sociologije osredotoča na spremembe, do katerih je prišlo v zadnjih letih v navezavi na urbano. V sklopu tega izpostavi raznolike poti urbanega razvoja, vpliv virtualne realnosti in premik od trenda migracij iz ruralnih v urbane predele h konstantnim migracijam (Zukin, 2011, 6–7). Sodobni prostor je vse prej kot enostaven za razumevanje, saj je v bistveni meri pridobil na kompleksnosti,[2] namreč razširil se je na vse sfere človekovega delovanja, kar vključuje naravo, tehnologijo, virtualne in fizične dimenzije ter tudi simbolne svetove (Zukin, 2011, 14). Poleg tega današnji sociologi in sociologinje delujejo v različnih vlogah (npr. raziskujejo, predavajo, svetujejo, ustvarjajo vsebine v medijih) in pod različnimi cilji, pogosto zavezani mehanizmom financiranja, priznavanja in politične prioritizacije raziskovalnih tem. To lahko vodi v reprodukcijo nekritičnih pogledov – denimo skozi opredeljevanje in naslavljanje problematičnih družbenih skupin (kot so revni, etnične manjšine, delavstvo) v okvirih, ki jih oblikujejo financerji, kar postane podlaga za politične intervencije v vnaprej določena problematična področja (Zukin, 2011, 13). Zukin zato, v duhu Castellsovega zgodnjega dela (1976b), poudarja vztrajanje pri znanstveni doslednosti teorije in opazovanja. Zapiše: »Če je mesto problem, bi ga morali biti sposobni teoretizirati, narediti konkretna opazovanja o njem in povezati naša opazovanja nazaj s teorijo. Opis ni dovolj« (Zukin, 2011, 14).

Preseganje polja

Tretja usmeritev sodobne urbane sociologije presega obstoječe okvire: bodisi skuša polje na novo opredeliti bodisi prehaja na nova polja zunaj urbanega. Zdravko Mlinar (1990, 5–6) trdi, da ima urbana sociologija preozek spoznavni domet ter kot alternativo predlaga prostorsko sociologijo, ki prostor razume kot inherentno dimenzijo družbenega življenja. Tak pristop pomeni pomemben odmik od urbane k prostorski epistemologiji v sociologiji, saj omogoča analizo prostorske organizacije ter sprememb na vseh teritorialnih ravneh hkrati – od lokalne do globalne – in odpira nova teoretska in metodološka izhodišča, ki presegajo tradicionalne zamejitve urbanega.

Martina Löw (2016, 188–190) opredeli prostor kot relacijsko ureditev, ki je procesne narave in v svoje nastajanje vključuje tako živa bitja kot tudi dobrine. Prostor nastaja skozi dva medsebojno povezana procesa, in sicer skozi prostorjenje in sintezo. Prostorjenje obsega prakse umeščanja, razporejanja in postavljanja elementov v prostor, sinteza pa označuje interpretativno dejavnost percepcije, spomina in imaginacije, s katero akterji povežejo elemente v smiselno prostorsko konfiguracijo. S tem postanejo različne prostorske formacije različice istega relacijskega procesa, kar ima pomembne implikacije za urbano, namreč urbanosti ne moremo razumeti kot lastnosti kraja (mesta), saj je kraj hkrati pogoj in rezultat prostorjenja.

Herbert J. Gans (2009, 212) opozarja na pretirano osredotočenost urbane sociologije na velika mesta, ki zanemarja druge tipe območij, kot so predmestja, majhna mesta in ruralna območja. Tipologija teh območij po njegovem ni smiselna, saj se velika in majhna mesta razlikujejo predvsem po velikosti, medtem ko so ruralna območja povezana z agrarno ekonomijo, kar pomeni, da njeni elementi nimajo skupnega imenovalca. Zaradi širokega in raznolikega razumevanja urbanega ter prepletanja struktur prek lokalnih meja je po njegovem raziskovanje težko omejiti na eno skupnost (Gans, 2009, 213), zato predlaga prehod k sociologiji naselbin (Gans, 2009, 214), ki omogoča analizo odnosov znotraj in med različnimi skupinami in institucijami, ne da bi jih bilo treba opredeljevati kot urbane ali ne (Gans, 2009, 215). Tak pristop hkrati odpira možnosti za preučevanje virtualnih naselbin (Gans, 2009, 217).

Cary Wu (2016, 104) pravi, da pristopi, kot je zadnji, lahko pripeljejo do sociologije vsega. V sklopu kritičnega pristopa do nove urbane sociologije, ki je preveč poudarjala strukturne dejavnike in ob tem spregledala vlogo mesta samega (Wu, 2016, 103), predlaga premik od urbane sociologije k sociologiji mesta. Slednja razume mesto kot avtonomno družbeno enoto, ki omogoča analizo razlik in podobnosti med mesti ter razumevanje njihove vloge v družbi – hkrati pa tudi načinov, kako družba ponovno opredeljuje mesto (Wu, 2016, 103–104), kar, tako trdi, omogoča razlikovanje med urbanim

2 Zukin (2011, 8) pravi, da sta družba in prostor danes preveč kompleksna, da bi jima nadeli izraze, kot sta »omrežna družba« (Castells) in »globalno mesto« (Sassen). Čeprav sta politično in ekonomsko privlačna, v znanstvenem kontekstu ostajata preveč pretočna in nedoločena.

in družbenim (česar nova urbana sociologija ni zmogla) (Wu, 2016, 104–105).

Richard E. Ocejo, Ervin B. Kosta in Alexis Mann so prepričani, da se je urbana sociologija v preteklosti preveč osredotočala na velika mesta. Kot pot do njene prenove predlagajo obravnavo urbanega v manjšem obsegu, torej usmeritev k preučevanju manjših mest. Procesi, ki se odvijajo na svetovni ravni, zaznamujejo mesta različnih velikosti. Pomemben korak k preporodu urbane sociologije tako vidijo v usmeritvi pozornosti na raziskovanje posameznih tem znotraj manjših mest, kar lahko še razširi in izostri aktualne koncepte in teorije urbanega (Ocejo et al., 2020).

Sodobna urbana sociologija se, tako kot prvi dve urbani sociologiji, sooča z več epistemološkimi ovirami. Ena od ključnih ovir je razdrobljenost poddiscipline. V zadnjih desetletjih se je urbana sociologija oddaljila od enotnega teoretskega okvira in razvila raznoliko paleto pristopov. Ta razdrobljenost zmanjšuje možnost za celostno razumevanje urbanega in otežuje povezovanje njegovih različnih vidikov v koherenten analitični okvir. Druga ovira so nezadostna teoretska orodja za razumevanje urbanega. Pogoste trditve o tem, da je urbana sociologija izgubila pojasnjevalno moč, kažejo na pomen konceptualne prenove. Namesto zgolj reaktivnega odzivanja na partikularne družbenozgodovinske okoliščine bi bilo treba utrditi temeljne koncepte poddiscipline, in sicer predvsem urbano (natančneje, obravnavati bi bilo treba ne samo to, kaj urbano ni, ampak tudi to, kaj urbano je), kar bi prispevalo k njeni znanstveni doslednosti. Tretja epistemološka ovira je nekritično sprejemanje ideološko obremenjenih raziskovalnih okvirov. Politične usmeritve in način financiranja raziskav pogosto vplivajo na opredelitev raziskovalnih problemov in vodijo k urbanim projektom, ki so prilagojeni političnim ciljem, kar lahko rezultira v nezadostne obravnave, nepoznavanje ali spregled urbanih konfliktov. Četrta ovira je povezana s tretjo, gre za pretirano usmerjenost v aplikativne rešitve. Pod vplivom političnih in ekonomskih interesov so urbane raziskave pogosto osredotočene na operativno reševanje posameznih problemov, pri čemer zanemarjajo konceptualno refleksijo. Mesto tako postane zgolj prizorišče implementacije rešitev, brez poglobljenega razumevanja njegovih dinamičnih struktur. Peta ovira se nanaša na premalo izkoriščeno interdisciplinarnost. Raziskovanje mest pritegne številne discipline – geografijo, arhitekturo, ekonomijo, urbano načrtovanje, politologijo, kriminologijo –, kar ponuja možnost širšega vpogleda, a hkrati otežuje vzpostavljanje koherentnega teoretskega okvira, saj v relaciji vzpostavlja konflikte in boje med različnimi disciplinami za opredelitev vednosti. Vseeno pa usklajevanje različnih perspektiv in sodelovanje med disciplinami predstavlja potencial za razvoj prenovljenega spoznavnega okvira urbanega. Čeprav se je urbana sociologija v zadnjih desetletjih razvijala v več smereh, se zdi, da danes stoji na točki, ko potrebuje novo paradigmo – takšno, ki bo sposobna nasloviti kompleksnost sodobnih mest, preseči partikularne enostranosti urbanega in ponuditi ustrezna teoretska ter metodološka izhodišča za prihodnje raziskave.

ZAKLJUČEK: K PREMOSTITVI OVIR V URBANI TEORIJI

Prispevek je obravnaval razvoj dveh pomembnih urbanih paradigm, ki sta nastali kot odziv na specifične družbenozgodovinske okoliščine, a so ju obenem zaznamovale ključne epistemološke ovire. Prva se je uveljavila v ZDA z zgodnjo urbano sociologijo čikaške šole (Burgess, 1967; McKenzie, 1967a; 1967b; Park, 1915; Wirth, 1938), ki je urbano (tj. urbanost in urbanizacijo) v času povečanega priseljevanja v mesta razumela kot univerzalno formo, utemeljeno na kvantitativnih dejavnikih, in naslonjena na biologijo je zanemarila makro vplive. Nova urbana sociologija, ki se je razvila v Evropi v poznih 60-ih 20. stoletja v času družbenih nemirov in povečanega vlaganja v reševanje urbanih problemov (Castells, 1976a; 1976b; Lefebvre, 2000; 2013; Logan & Molotch, 1987), je zgodnji pristop nadomestila s historičnim materializmom, a kljub kritiki kapitalistične urbanosti ni prišla do zaključka o svojem predmetu, prav tako je marginalizirala vlogo prostora.

Konec 20. stoletja, predvsem pa v 21. stoletju, je za urbano sociologijo v sklopu novih tehnoloških, migracijskih, okoljskih in drugih izzivov, ki so politično izpostavljeni in razreševanje katerih je finančno podprto, značilna fragmentirana znanstvena produkcija, ki jo lahko strnemo v tri usmeritve. Prva usmeritev snuje nova pojmovanja mest, kot so informacijska mesta in globalna mesta (Castells, 2002; 2010; Sassen, 2000; 2001; 2006), druga nadalje razvija novo urbano sociologijo in jo opredeli kot kritično urbano sociologijo (Brenner, 2004; 2009; Zukin, 2011), tretja skupina pa poskuša preseči urbano sociologijo z redefiniranjem obstoječega ali prehodom na nova polja (Gans, 2009; Löw, 2016; Mlinar, 1990; Ocejo et al., 2020; Wu, 2016). Ti pristopi se za zdaj še niso širše uveljavili in jim primanjkuje teoretskih orodij ter fleksibilnosti za obravnavo različnih form urbanega, tako se v preučevanju prilagajajo novim formam, kar je problematično predvsem pri prispevkih, ki že v izhodišču nekritično prevzemajo politične pojme ali pa se podredijo aplikativnim logikam.

Vprašanja, ki zadevajo epistemološke ovire sodobne urbane sociologije, ostajajo nerešena, njihovo preseganje pa bi lahko vodilo v oblikovanje nove

paradigme – kar se v trenutnih razmerah krize zdi potrebno. Če se je Castells (1976b) konec 60-ih let 20. stoletja spraševal, ali sploh obstaja urbana sociologija in kaj je njen predmet, se danes zdi, da ta predmet obravnavajo druge discipline, predvsem računalništvo in inženirstvo (npr. za pametna mesta cf. Winkowska et al., 2019), kjer poteka bogata znanstvena produkcija. V luči te krize in znakov nepremoščenih epistemoloških ovir je ta prispevek – s preučevanjem razvoja vednosti o urbanem in njenega družbenozgodovinskega konteksta – poskušal oblikovati osnovo za prihodnje razvojne premike ter za snovanje novih epistemoloških orodij. Urbana sociologija ima namreč še vedno veliko za ponuditi, zlasti zaradi svoje sposobnosti kritične distance do ideoloških okvirjev, še posebej v času, ko se z urbanim vse bolj ukvarjajo druge discipline (May et al., 2005, 345). Ob tem je treba upoštevati, da je znanstveno polje prostor nenehnih bojev za določanje legitimne vednosti. Paradigme se vzpostavljajo in rušijo skozi razmerja moči tako znotraj discipline kot tudi med disciplinami, ki si prizadevajo določiti, kdo sploh sme pisati o urbanem in kako (Bourdieu, 1991). Ta dinamika tekmovalnosti in prepletanja konceptov dodatno prispeva k problemu področja. V poplavi pojmov, kot so pametno mesto (Eremia et al., 2017), digitalno mesto (Couclelis, 2004), eko mesto (Roseland, 1997), trajnostno mesto (Cohen, 2018) in ožičeno mesto (Dutton et al., 1987), je ključno, da urbana sociologija teh pojmov ne prevzame nekritično kot izhodišče svojih obravnav, saj tako hitro postane predpisujoča – namesto tega je pomembno, da kritično analizira nove urbane vizije (May et al., 2005, 345–347). Preučevanje razvoja epistemologije urbanega pokaže na to, da urbana sociologija potrebuje premik k novim, bolj refleksivnim in celovitim urbanim spoznavnim okvirom. V sklopu tega bi bilo treba ponovno premisliti in artikulirati velika vprašanja, kot je, kaj sploh je urbano (cf. Uršič & Hočevar, 2007) in preizprašati položaj urbane sociologije v širšem znanstvenem polju. Le s preseganjem razdrobljenosti, razreševanja zgolj posameznih ugank, kot bi rekel Kuhn (1998), in pretirane aplikativnosti bo urbana sociologija lahko razvila trdnejše in obenem prožnejše teoretske okvire, ki se bodo uspešno soočali s kompleksnimi razsežnostmi ter prispevali k razumevanju in reševanju izzivov urbanega sveta.

Tabela: Razvoj urbane sociologije in njenih ovir.

	Družbenozgodovinski kontekst	**Fokus**	**Predstavniki in predstavnice**	**Epistemološke ovire**
Zgodnja urbana sociologija	- Prva polovica 20. stoletja - ZDA - Povečano priseljevanje v mesta in naraščajoči problemi v mestih	Čikaška šola in njene osnove v urbani sociologiji, poudarek na družbeni ekologiji in interakcijah	Robert E. Park (1915); Ernest W. Burgess (1967); Roderick McKenzie (1967a; 1967b); Louis Wirth (1938)	- Zanemarjen vpliv družbene strukture - Univerzalnost urbanih procesov - Biološka analogija - Kvantitativni dejavniki pri opredeljevanju urbanega - Zmanjšanje pomena prostora
Nova urbana sociologija	- Od 60-ih do začetka 80-ih let 20. stoletja - Evropa - Naraščajoči družbeni nemiri in povečano državno financiranje za ukvarjanje z družbenimi problemi v mestih	Historični materializem in kritika zgodnje urbane sociologije, obravnava strukturnih vprašanj	Manuel Castells (1976a; 1976b); Henri Lefebvre (2000; 2013); John R. Logan & Harvey L. Molotch (1987)	- Prekomerno osredotočanje na politično ekonomijo - Poskus dviga znanstvenosti brez zaključka - Politizacija prostora - Manko interdisciplinarnosti - Marginalizacija vloge prostora
Sodobne urbane teorije v sociologiji	- Od konca 80-ih 20. stoletja naprej - Svet - Tehnološki, migracijski in drugi izzivi - Mesto v osrčju političnih strategij in predmet financiranja v raziskovanju - Urbano postane predmet zanimanja različnih disciplin	Razdrobljenost področja z različnimi pristopi in dimenzijami urbanega	Tri usmeritve: 1) Nova pojmovanja mest: Manuel Castells (2002; 2010); Saskia Sassen (2000; 2001; 2006); 2) Kritična urbana sociologija: Neil Brenner (2004; 2009); Sharon Zukin (2011); Neil Brenner & Christian Schmid (2015); 3) Preseganje polja: Zdravko Mlinar (1990); Martina Löw (2016); Herbert J. Gans (2009); Cary Wu (2016); Richard E. Ocejo et al. (2020)	- Razdrobljenost poddiscipline - Manko teoretskih orodij za razumevanje urbanega - Nekritično sprejemanje ideoloških pojmov - Prevelika osredotočenost na aplikativne rešitve - Manko izkoriščanja prednosti interdisciplinarnosti

SOCIOLOGICAL OBSTACLES IN THE DEVELOPMENT OF URBAN EPISTEMOLOGY

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SUMMARY

The development of urban epistemology encompasses two influential paradigms: first, the early urban sociology of the Chicago School in the early 20th century in the United States, and later, the new urban sociology in the second half of the century in Europe. This article examines the dominant paradigms linked to the field's development, highlighting key epistemological obstacles shaped by socio-historical conditions that hindered paradigmatic shifts. An analysis of the work of prominent figures shows how new urban sociology addressed many early limitations. An examination of current developments reveals a fragmented field, which can be classified into three strands: one develops new conceptualizations of the city, another further advances the new urban sociology and defines it as critical urban sociology, and a third seeks to transcend the field by redefining the existing field or shifting toward new fields. In view of the ongoing crisis of the subdiscipline, the article proposes a foundation for further development of epistemological tools to study the urban.

Keywords: urban sociology, urban epistemology, Chicago School, new urban sociology, epistemological obstacles

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WELFARE PERCEPTIONS IN TIMES OF CLIMATE CHANGE: THE CASE OF SLOVENIA

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ABSTRACT

Climate change brings direct risks like floods and heatwaves and indirect risks from policy changes, disproportionately affecting vulnerable groups. Since welfare systems depend on public support, understanding perceptions is crucial for maintaining public acceptance of climate-related policies. The way the media frames "deserving" and "undeserving" groups shapes public opinion and risk-related narratives. The article considers Slovenian media narratives between September 2023 and September 2024 in two major newspapers to examine portrayals of vulnerability and deservingness. The findings contribute to understanding how media narratives shape solidarity and have implications for designing socially legitimate and inclusive climate and welfare policies.

Keywords: welfare state, climate change, deservingness, vulnerable groups, media

PERCEZIONI SUL WELFARE IN UN CONTESTO DI CAMBIAMENTO CLIMATICO: IL CASO DELLA SLOVENIA

SINTESI

Il cambiamento climatico comporta rischi diretti, come inondazioni e ondate di calore, e rischi indiretti derivanti dai cambiamenti delle politiche, che colpiscono in modo sproporzionato i gruppi vulnerabili. Poiché i sistemi di welfare dipendono dal sostegno pubblico, comprendere le percezioni è essenziale per mantenere l'accettazione pubblica delle politiche climatiche. Il modo in cui i media rappresentano i gruppi "meritevoli" e "non meritevoli" influenza l'opinione pubblica e le narrazioni sui rischi. L'articolo analizza le narrazioni di due principali quotidiani sloveni tra settembre 2023 e settembre 2024, evidenziandone le rappresentazioni di vulnerabilità e merito. I risultati contribuiscono a evidenziare come le narrazioni mediatiche plasmino la solidarietà e abbiano implicazioni nella creazione di politiche climatiche e di welfare socialmente legittime e inclusive.

Parole chiave: stato sociale, cambiamento climatico, merito, gruppi vulnerabili, media

INTRODUCTION[1]

Climate change presents a significant challenge for the welfare state and calls for its reframing (Cucca et al., 2023; Koch et al., 2023; Murphy, 2023; Gengnagel & Zimmermann, 2022). Literature has traditionally focused on other pressing challenges caused by economic pressures and low growth, digitalisation, the demographic shift and ageing of the population, even the recent COVID-19 pandemic. These are often termed as first and second generation risks that the welfare state is traditionally addressing through developing various policies. Hvinden and Shoyen (2022) note that, despite the multiple intersections between climate change and social policy, the research agenda on where these two spheres overlap is quite new and considers the social and welfare implications of the global climate crisis, and only more recently the actual/potential role of social policy to assist with the needed transformation to a net-zero or low-emissions world.

The risks brought by climate change take the form of direct risks, such as heatwaves, floods, droughts and other extreme weather events that influence the well-being of people (e.g., impacting either their wealth by damaging houses, or personal well-being such as health) and often disproportionally affect already vulnerable groups in society with fewer resources to cope (Mandelli et al., 2024; Gough, 2017). While not necessarily new, their intensity, severity and incidence are rising considerably. Addressing such areas of vulnerability adds pressure to the welfare state to help the groups impacted and assure their needs are met. When certain groups in society are disproportionally affected and in a systematically worse position, the perceived social justice in society can become challenged and be seen as double injustice; namely, those contributing less to the problem are affected by it more (Hvinden & Shoyen, 2022; Gough, 2013; 2017; Cucca et al., 2023).

Simultaneously, additional issues arise from 'indirect' risks when implementing policies that seek to tackle climate change, reduce air pollution, and support the transition to a green economy, such as carbon taxes and the low-carbon transition of productive systems, and the transformation of specific industries and emission-intensive sectors (e.g., the extractive sector). Mitigation of ecological transition can have strong social implications such as higher energy prices, transport costs, or job losses in certain sectors or even trigger an economic downturn in whole communities/regions (cf. Mandelli et al., 2024). These direct and indirect risks are termed as third generation social risks, that the welfare state needs to address in the future, adapting its policies and programmes (Mandelli et al., 2024).

Irrespective of the European Union's focus on a 'just transition', policies to reduce climate change can unevenly affect specific branches and professions (e.g., due to stricter emissions regulations), as well as particular groups (e.g., by higher prices caused by new energy taxes) and the regressive effects of fiscal measures, rising energy and consumer costs (Sabato et al., 2022; Cucca et al., 2023; Mandelli et al., 2023). The described novel challenges and vulnerabilities in society provide the setting in which the welfare state is expected to implement the just transition goals while reducing the mentioned new social risks. The welfare state's role here can be to apply traditional redistributive measures (such as income transfers) and more social investment-oriented policies like skill development and active labour market policies (Hvinden & Shoyen, 2022; Laruffa & Nullmeier, 2025). Some authors (cf. Cucca et al., 2023) also indicate the need for preventive policies (e.g., within urban planning, education or healthcare).

The described challenges might also mean that it is time for new discussions related to the welfare state on the (socially) just approach to mitigating these risks, also when it comes to established welfare programmes and their target groups. When the vulnerabilities and groups correspond to existing vulnerable groups already targeted by welfare programmes (such as older people or children), solidarity may be extended with less discussion and problematising of the issues, whereas new target groups might bring a novel challenge of how to integrate them with the just distribution perceptions and, in turn, create a potential new cleavage in social solidarity. Pressures like this can therefore trigger tensions with established social priorities (Gough & Meadowcroft, 2011; Ruser, 2023). As Hvinden and Shoyen (2022, 237) state, "it is essential in the debate to be sensitive to the issues of who are the most vulnerable groups and where the most disadvantaged countries and regions in the ecosocial transition are". To that end, one should not only look at the objective positions, but representations of these vulnerabilities and deservingness for welfare help, because "debates about this deservingness of people can never be reduced to objective facts but involve normative and political consideration" (Ruser, 2023, 67).

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THE WELFARE STATE, RISKS, AND DESERVINGNESS

The fact welfare arrangements in different fields are based on different logics of social justice and deservingness (cf. van Oorschot et al., 2022) makes it important to understand how these perceptions are formed in the new field of climate change mitigation within social policy. Such perceptions may be seen as linked with general attitudes to the welfare state and its role in assisting more vulnerable groups in society. Despite significant institutional differences, European support for the welfare state and its (re)distributional activities is relatively broad, with van Oorschot (2006, 23) noting, "Europeans share a common and fundamental deservingness culture". This support is also linked to the relatively universal ranking of groups based on their deservingness – from the most deserving (older or sick people) to less deserving, such as the unemployed, those receiving social assistance through to the least deserving groups like migrants (van Oorschot, 2006; van Oorschot & Roosma, 2017; Laenen & Meuleman, 2017; van Oorschot et al., 2022).

Alongside this widely agreed ranking are institutional welfare frameworks that frame the social justice perceptions and vulnerabilities, and the way the new risks are discussed and potentially addressed is embedded within different welfare-state institutional setups (Laenen & Meuleman, 2017; van Oorschot et al., 2022). Namely, welfare states differ in how they address basic needs, as well as the level of redistribution and moral economies (cf. Esping-Andersen, 1990; Kuitto, 2016; Mau, 2003). The Slovenian welfare regime has often been described as hybrid, featuring characteristics of a social democratic welfare regime with a strong emphasis on equality and universal services, together with a corporatist strong reliance on the social insurance scheme as a basis for addressing various social risks, underscored by values of merit and reciprocity (Kolarič et al., 2009; Filipovič Hrast & Rakar, 2018; 2020). Such an arrangement makes it unclear whether a more merit-based approach or a more universal approach focused on equality will guide efforts to respond to the new vulnerabilities caused by climate change.

The approach taken in this article is to consider these arguments by looking at media debates, which have been shown to frame the welfare deservingness of certain vulnerable groups (Tarkianen, 2023). The literature also shows that individual-level attitudes to deservingness closely interact with how deserving (or undeserving) groups are framed in public discourse, particularly in the media (e.g., Esmark & Schoop, 2017; Lepianka, 2015). The media functions as active partners in constructing and framing deservingness that can impact public support for welfare programmes and work as discursive spheres via which morals and norms are represented and legitimised (Tarkianen, 2023). This accordingly relates to the idea that various actors provide frames, which represent the interpretation scheme that structures the meaning of reality (Berger & Luckmann, 1966; Goffman, 1974; Yerkes et al., 2022). The media forms public images, reflects and reinforces notions of risks connected to climate change, associated risk groups, and the policies that should/could be adopted in response to them. Such framing thus reflects and co-produces notions of deservingness while contributing to a possible shift in paradigms of redistribution (cf. Tarkianen, 2023).

In this article, focus is therefore given to the vulnerable groups identified in the media with respect to direct and indirect risks, as well as arguments appearing in the discussions on perceptions of the deservingness of these groups. A basis is thereby provided for determining whether new societal cleavages are possibly forming as a result of the new challenges facing the welfare state to do with climate change and how the deservingness debates and perceptions of fairness and arguments are changing in view of the unparalleled climate challenges and 'greening' of the welfare state.

For that purpose, we analysed media articles in two main daily newspapers in Slovenia (Večer and Delo), identified the vulnerable groups mentioned, and examined the main arguments vis-à-vis the theory of deservingness and the so-called CARIN criteria (van Oorschot, 2006; van Oorschot et al., 2022; Varo, 2024). The theory of deservingness states there are five distinct criteria for selectivity or deservingness. *Control* refers to the extent to which individuals are seen as being personally responsible for their situation. *Attitude* concerns how recipients respond to benefits, including their perceived gratitude and appropriate behaviour. *Reciprocity* involves the extent to which individuals are regarded as having contributed or earned support; and more recently also interpreted as willingness to give something in return. *Identity* relates to the perceived closeness/similarity of the recipients and the broader community as well as different identity groups. Finally, *need* refers to the level of neediness or severity of an individual's deprivation.

METHODOLOGY

Our methodological framework integrates principles of qualitative content analysis, employing thematic analysis as the primary analytical strategy, guided by the logic of saturation and informed by a comparative media analysis protocol.

Consistent with the evolving literature on climate change and welfare states (Hvinden & Shoyen, 2022; Cucca et al., 2023; Mandelli et al., 2024), the analysis was structured around two categories of climate-related risk: direct risks (floods, heatwaves, air pollution) and indirect risks (energy and mobility transitions). Direct risks encompass immediate threats to well-being and infrastructure, with disproportionate effects on vulnerable populations (e.g., the elderly, people with chronic illness). Indirect risks stem from mitigation and adaptation policies which, although necessary, carry redistributive effects that may produce new socio-economic vulnerabilities (e.g., energy-poor households, rural commuters). Including both types of risk allows for a broader understanding of how climate change is challenging the normative foundations of welfare support and deservingness in public discourse. The selection of topics was based on debates taking place in the Slovenian public sphere and political arena and thus reflects the issues that were salient within the chosen time frame. More broadly, public discourse in Slovenia during this period was strongly shaped by concerns about climate-related risks, most likely because of the extensive and devastating floods that affected the country in August 2023.

To capture the dominant narratives and public framings, we selected two major Slovenian daily newspapers – Delo and Večer – given their broad national reach, established journalistic standards, and availability of digital archives. Articles were collected from their online archives covering the period from 1 September 2023 to 1 September 2024, reflecting a full year of published material. Articles were collected using predefined search terms (e.g., "flood*", "heat*", "energy transition", "carbon tax", "electric cars" etc.) linked to pre-determined climate-related topics. Articles unrelated to the national or EU-context without direct implications for Slovenia were excluded. The corpus used for the analysis comprised a total of 275 articles, of which 154 were drawn from the daily newspaper Delo and 121 from Večer.

A theoretical saturation approach was applied. For each topic, we reviewed the 20 most recent articles and the five earliest within the mentioned timeframe. Saturation was reached when no new themes emerged. If not, up to five additional articles were analysed. To provide analytical depth and completeness, we combined the principle of theoretical saturation (Glaser & Strauss, 1967) and meaning saturation (Hennink et al., 2017). The aim was hence not simply to identify when no new themes appeared, but to additionally achieve a nuanced understanding of key themes like vulnerability, deservingness, and actor framing. The decision to stop sampling was accordingly guided by the conceptual thematic depth achieved in the analysis, and not just by the frequency of themes.

Deductive thematic analysis was employed for the presented research (Boyatzis, 1998; Braun & Clarke, 2006; Hayes, 1997), guided by a structured coding framework. The coding process followed a systematic approach, breaking the data into meaningful units to identify recurring patterns and themes, in line with the methodology outlined by Saldaña (2012). A coding scheme was developed and structured around six categories: (1) type of risk; (2) actors and framings; (3) target groups; (4) deservingness criteria (CARIN – Control, Attitude, Reciprocity, Identity, Need); (5) discussed trade-offs; and (6) future scenarios.

The articles were analysed using professional software program for qualitative and mixed-methods data analysis MAXQDA with the unit of coding being a sentence or paragraph, depending on the specificity of the content. Coding was applied systematically across all articles, enabling cross-theme comparisons. The coding was conducted by two researchers who discussed and reconciled coding decisions iteratively (also in broader team meetings) until consensus was reached; therefore, intercoder reliability was ensured through this consensus-based procedure rather than through percentage agreement. The approach balances deductive theoretical insights (CARIN criteria, welfare theory) with inductive sensitivity to new framings and emerging discourses.

MEDIA ANALYSIS OF VULNERABILITIES AND DESERVINGNESS CRITERIA IN SLOVENIA

Identified vulnerable groups

Vulnerable groups in society traditionally perceived as the most deserving of welfare state assistance are older people and sick people. The development of welfare state programmes addressing these risks reflects this view, with the roles of pension and disability insurance being key. How media depict these groups matters, as news framing of welfare recipients as more or less deserving has been shown to directly shape public support for redistribution and social protection (Baumberg Geiger, 2023; Esmark & Schoop, 2017; Larsen & Dejgaard, 2013). The described groups are also regularly mentioned in relation to the direct and indirect risks of climate change in Slovenia.

> *Heat can be especially dangerous for the elderly, but also for children, pregnant women and many patients – especially those with*

> *cardiovascular and respiratory diseases, diabetes, kidney disease, immobile people, and people with mental disorders, NIJZ points out. Caution is also advised for people who experience fever or digestive problems during these days*. (Juvan, 2024)

Traditionally, migrants are regarded as being one of the least deserving groups in the welfare state, a view commonly reflected in literature on welfare chauvinism (van Oorschot, 2006; van Oorschot et al., 2017; Larsen, 2020; Eick & Larsen, 2021). Although the current analysis does not reveal a clear cleavage in this respect, the near-complete absence of explicit references to migrants, except in the context of heat-related risks and the associated notion of climate refugees, suggests the continuation of this exclusionary pattern. This is consistent with research showing that when migrants do appear in climate-related media coverage, they are typically framed in abstract or passive terms, with their deservingness status left ambiguous or implicitly subordinated to that of the native population (Dreher & Voyer, 2015). Experimental evidence further suggests that the perceived cause of displacement matters for public deservingness judgements: climate migrants tend to be seen as more deserving than economic migrants but less so than refugees fleeing persecution (Arias & Blair, 2022; Hedegaard, 2022), indicating that the "climate refugee" label carries only partial moral legitimacy in public perception. When migrants are mentioned in the Slovenian press, it is typically in abstract terms or indirectly through references to the main population affected by serious flooding, as illustrated in the quotes below.

> *Nor is the damage evenly distributed, nor will it be. Some people are more affected than others. And we know who they are – when they arrive at our borders*. (Bojc, 2024)

> *In August, Slovenia found itself in the centre of climate change and got its first climate 'refugees'*. (Prijatelj Videmšek, 2023a)

Employment plays a central role in determining views on deservingness within the welfare state, especially when examining group positions. In the context of climate-related risks, specific vulnerabilities associated with certain professions are acknowledged, notably among workers most exposed to extreme weather events, such as construction workers and farmers. These emerging risk groups show the need for targeted adaptations in welfare state policies and programmes to effectively mitigate the associated impacts.

> *The Ministry of Labour, Family, Social Affairs and Equal Opportunities is working on changes to occupational safety and health and on the first measures to protect workers on construction sites in times of increased temperatures or climate change*. (Malovrh, 2024a)

> *Not only plants, but also agricultural workers are increasingly exposed to more heat stress*. (Prijatelj Videmšek, 2024)

The above-mentioned groups generally correspond well to traditional risk groups. However, we also identified new groups that might become an important target group for the welfare state. These are linked with housing and living characteristics, generally urban and rural population or more specifically homeowners, owners of solar panels, and owners of heat pumps.

> *Transport poverty is particularly severe in peri-urban and rural areas as a result of the rising energy prices, lack of affordable transport options and higher costs associated with longer distance travel*. (Kotar, 2024)

> *Traffic emissions are a major source of NO2, which means that densely populated urban areas, especially in high-income countries, are often exposed to the highest levels of NO2 exposure and health impacts*. (Malovrh, 2024b)

> *Climate change can be felt more intensely in cities than elsewhere. In most European cities, people rank heat among the most important risks. Temperatures in cities can be as much as 10 or 15 degrees Celsius higher than in the surrounding area. On the other hand, more frequent and heavy rainfall can cause flooding in urban areas. 10.6% of urban areas in Europe have a high risk of flooding. (*Tavčar, 2024a)

Certain groups, such as homeowners, may be quite vulnerable to climate-related events like floods, as well as rising energy costs, an issue increasingly tied to the broader energy transition. These challenges are further compounded by disparities in access to infrastructure investments, such as solar systems or heat pumps. Emerging vulnerabilities of this type may contribute to the emergence of new social cleavages, adding strain to the welfare state. Existing research already reveals this dynamic, highlighting that the lower-middle class often bears a disproportionate share of the costs associated with decarbonisation (cf. Mandelli et al., 2024).

Costs are rising, but most households will pay less for their grid charges, while the owners of solar systems and heat pumps will pay more. (Tavčar, 2023a)

In addition to the financial savings, home solar PV systems provide a sense of energy independence and resilience. By generating their own electricity, homeowners are less vulnerable to fluctuations in energy prices and disruptions in the centralised electricity grid. (R. N., 2024)

They say the result of the new system will therefore be positive for heat pump users as, according to analyses, the cost of electricity would even decrease slightly compared to the current regime. However, it will be up to the user to monitor consumption and to cause as few peaks as possible, especially at times of peak load on the grid. (Gavez Volčjak, 2024)

One characteristic of the media debate is that it often describes risks as being associated with the general population as a whole (people generally, households, consumers, citizens etc.), and thus does not distinguish how these risks actually affect different groups in diverse ways and in turn not acknowledging the risk accumulation and multiplying of the vulnerabilities of particular groups. This was perhaps most evident in the relatively low frequency in the media articles of the most vulnerable groups in society such as poor people and poor households, the homeless, or ethnic minorities like Roma. They were identified in a few articles where their extra vulnerability to either extreme events (and inability to, e.g., insure themselves against them) or increasing costs (e.g., in energy or transport) was described, however often only in the sense of listing them together with other groups and without any in-depth discussion of particular vulnerabilities.

"Climate policies will make fossil energy sources more and more expensive, and the most vulnerable households do not have the means to switch to renewable energy and invest in energy efficiency, so they need to be helped as a priority", said Andrej Gnezda, Director of the Climate Policy Directorate. (Prijatelj Videmšek, 2023b)

There is no one-size-fits-all model. What works in one country will not necessarily work in Slovenia. It is possible to subsidise [insurance]

Table 1: Main target groups in relation to specific risks identified in the media.

Climate-related risks	Main target groups
Heat	The population as a whole, people generally, the elderly, children, certain workers (e.g., outdoor, construction, police), people living in cities, patients (i.e., those with vulnerable health), climate refugees/migrants, people living in coastal areas, the poor.
Air pollution	People generally, EU citizens, children, people living in cities, patients, the elderly, cyclists, cities/communities, the poor.
Floods	Communities, people whose home was lost to or damaged by floods, working in agriculture (farmers, fishermen), the poor, businesses.
Energy transition	Society as a whole, businesses, consumers, specific households (such as owners of solar PV systems, owners of heat pumps, users of electrical appliances), future generations, workers.
Mobility transition	The general population, citizens of Slovenia, passengers, the elderly, students, cyclists, employed/workers, users of public transport services, residents of rural areas, people with cognitive, sensory and/or physical disabilities, vulnerable groups (the poor, Roma).

premiums for the most vulnerable. Among the 680,000 households living in houses, about 85,000 are below the poverty line and cannot afford insurance. (Tomažič, 2024)

Irena Kozar, from the Joint Environmental Protection Service at the Maribor Joint Municipal Administration […] *also warns of the dangers of burning waste, which households also use to save energy. "We know that energy poverty is considerable", she notes, recalling the subsidy that can be received by households in need*. (Juvan, 2023)

Deservingness arguments in relation to climate risks

What interests us in this paper is not merely the groups mentioned in the media but also the way their vulnerabilities and deservingness for welfare state help are discussed. We based our analysis on the CARIN criteria described in the theoretical section, which have recently been applied to climate-related contexts to assess how publics and media evaluate who deserves protection from externally caused risks (Aksit & Laenen, 2025; Crabtree & Wehde, 2022).

The main criterion associated with all the direct and indirect risks observed was **need**. As concerns both direct and indirect risks, need was a clear criterion described in the articles in the sense of being affected more by climate change or green transition policies. Nevertheless, within this general criterion, there was no nuance concerning the extent of such needs. For instance, people affected by flood were all seen as equally vulnerable, even though it is most likely there were variations in the extent of the damage or the resources available to cope with the impacts of the natural disaster.

And as if this fact were not terrifying enough, we are now receiving daily information that in areas where people suffered enormous damage and lost a lot, some even (almost) everything, during last year's floods, the state has still not managed to repair last year's damage. What's more, in some places the repair processes have not even commenced. The embankments have not been built. The riverbeds have not been cleaned. The houses affected by last year's floods have not yet been repaired. And they are already flooding again. (Vuk Godina, 2024)

Workers are exposed to accidents in the heat, to sickness, and there is no awareness that this must be taken care of. (Kutin, 2024)

[…] *many elderly people who do not have their own means of transport cannot even go to the shops or do other urgent errands without public transport*. (Tavčar, 2023b)

The criterion of **control** was more pronounced in direct risks, which is not surprising. Here, the issue of control over vulnerabilities is clearer since as individuals we have little control over the extreme weather events and are therefore clearly more deserving. In comparison, with indirect risks, the issue of control is less clear, and is therefore a less important criterion not mentioned as much in the examined articles.

For me, the working population is very important – people who cannot go anywhere, who have to stay in one place because they have no choice. (Kutin, 2024)

It was definitely the floods that stood out among negative events. That is why the damages paid out were four times higher than the average for the last 15 years. The watercourses overflowed their banks very quickly, so the residents were unable to take quick action to protect their properties. They were not able to move their cars or secure their houses. That is why the damage was quite high. (Tomažič, 2024)

Yet, with respect to the control criterion, a specific aspect seems apparent, one that is perhaps more evident relative to third-generation social risks than first- and second-generation social risks. Namely, the risks faced are less individual than established ones (old age, maternity, illness, work life balance, care needs etc.) since their production is collective, and their effect is also often more experienced collectively. This is linked to the distinction between old social risks that were individually unpredictable but collectively predictable and visible as they affected an easily defined segment of the population, while the social risks associated with climate change are collective, less observable, and more unpredictable (Gough et al., 2008; Hirvilammi et al., 2023; Mandelli et al., 2024). As Johansson et al. (2016) argue, deservingness frameworks developed for first- and second-generation social risks were designed with individually attributable causes in mind and do not straightforwardly accommodate risks whose production is inherently collective. In the understanding of such risks, individual control (or lack thereof) is combined with the collective responsibility for the production of these risks. Consequently, lack of control on the individual

level is mediated in perceptions by the presence of collective responsibility for the creation and mitigation of risks and thus the perception of (collective) control.

> *We have taken away the space from the river and as a consequence the river flooded during heavy rainfall*. (Verovnik, 2024)

> *We are harming the environment and our health with inadequate heating and outdated combustion appliances, and the chimney sweeping system we have set up, and thus the control of combustion appliances or users, is virtually powerless*. (Malovrh, 2023)

> *There is a lot of daily commuting, especially to Ljubljana; on one hand, public transport is being neglected, forcing people to drive themselves, which requires new roads, new roads mean more traffic, and the vicious circle goes round and round*. (Boncelj, 2023)

> *This collective control and hence responsibility for the creation and mitigation of the risks was in some cases refined to target only specific groups that are the most responsible, such as high polluters and the rich: "The richest five percent of people are responsible for 37 percent of the increase in emissions* […]". (Tavčar, 2024b)

While control appeared as an important criterion with more direct risks, it was less prominent while indirect risks were being debated. **Attitude** and **reciprocity** were more pronounced here, with the link between the two criteria being evident since reciprocal activity mostly encompasses more environmental-friendly behaviour (e.g., cycling). In attitude self-help actions, resilience in the face of extreme weather events as well as protective and preventive actions are put forward, such as personal investments in houses after extreme floods.

> *For people to be willing to pay the costs of environmental action, whether material or by way of changed lifestyle, they need to believe that others will do the same so that the majority of their fellow citizens will not be 'free riders' who contribute nothing but simply want the benefits of others' sacrifices*. (Malnar, 2024)

> *In the light of these findings, the researchers suggest that policymakers should think about environmental action within a logic of collective action, emphasising environmentalism as a social norm, penalising free-riding, and rewarding participation by individuals and organisations*. (Malnar, 2024)

> *However, the Slovenian Energy Agency believes that such households are likely to possess sufficient information about their consumption and are also equipped with new technologies to manage their energy use. The use of some appliances can be postponed to a more favourable time period*. (Tavčar, 2023c)

> *In practice, this means that cycling is on average seven times less polluting than bus travel and an impressive 18 times less polluting than driving. That means bike-sharing users have managed to save 24.9 tonnes of CO2 compared to car transport. This achievement not only promotes sustainable mobility but also highlights the enormous impact of every individual's decision to choose a more environmentally friendly mode of transport*. (ŠTR, 2024)

Still, changing lifestyle practices is not always evaluated as simply positive because financial incentives can also be seen as unjust by targeting the middle class and further burdening public finances:

> *This is also strongly financially incentivised, and the owners of electric vehicles do not pay special taxes for the energy they use, quite the opposite. They benefit from various incentives that are a burden on public finances or at least do not contribute to them*. (Kordež, 2023)

Identity as a criterion was almost absent from the discussions in the media. Specific local identities were sometimes mentioned as being more deserving due to a history of vulnerability, such as people from Šoštanj, a region marked by mining industry and coal plants, or people living in affected and in future more vulnerable regions (e.g., subject to landslides, floods). As already mentioned, migrants and climate refugees were hardly discussed; namely, areas where one would expect the identity criterion to be most prominent.

> *We, the residents of Šoštanj, want our environment, deeply injured by the consequences of mining and the discharges of TEŠ, to be slowly restored, thereby creating opportunities for the development of recreation and tourism*. (Petek, 2024)

This quote shows that local identity-based deservingness claims are rooted in historical injustice and place-based vulnerability, rather than in broader solidarity with other groups facing climate

risks. The fact that such claims remain exceptional in the coverage indicates a broader tendency in Slovenian media to address climate risks in generalised, need-based terms, leaving identity-specific vulnerabilities, whether based on place, occupation, or migrant status, largely unarticulated.

CONCLUSION

In this paper, we analysed debates concerning climate change and the ways climate-related risks are portrayed in Slovenian media, which groups are mentioned as being more vulnerable to such risks, and whether they are seen as deserving (of the welfare state's assistance). These deservingness principles indicate the principles of welfare state justice, i.e., rules and values according to which redistribution occurs, and vulnerabilities are addressed (Yerkes et al., 2022; van Oorschot et al., 2017).

The analysis of the examined media articles reveals the basic justice principle was of universality linked to equality, illustrated by the general focus on the population as a whole or larger segments of it, such as urban and rural dwellers, homeowners (in a homeowning nation), as well as the relatively general criterion of need that was used, with hardly any focus on the most vulnerable groups. This is in harmony with the present focus of the welfare state in Slovenia and the relatively universalistic approach inherent to several programmes and services (healthcare, childcare, education etc.). The discussions in the articles had a general focus that did not describe specific needs or the potential for risks to accumulate, as debated in scientific literature (cf. Gough, 2013; Hvinden & Shoyen, 2022). Instead, the focus was on vulnerabilities linked to climate change in quite a general way where all affected seem equally deserving of help. This may also be partly explained by the deservingness arguments based on the control criterion since the media framing was largely based on the lack of control people have in the face of climate risks. Such a focus might also reflect certain characteristics of climate risks, which are collective, less observable and more unpredictable than the more collectively predictable old social risk (Gough et al., 2008; Hirvilammi et al., 2023; Mandelli et al., 2024).

In addition, there is evidence of the importance of merit and status preservation in the media frames, consistent with the conservative-corporativist elements of the Slovenian welfare state. This was shown in the attention paid to several specific employment groups, as well as, for instance, the indiscriminate focus on homeowners or owners of solar panels that saw no discussion of the potentially higher social standing of such groups, but concentrated on returning their investment and thus retaining their position in society. Further, the environmental attitude was seen as an important criterion for deservingness, linked to the relevant attitudinal criteria in old social risks, such as obedience, and willingness to work, as well as the criterion of reciprocity as having contributed with a more ecofriendly lifestyle. Nonetheless, individuals' ability to change their lifestyles into more environmentally friendly lifestyles is rarely debated.

This finding therefore indicates that also for third-generation social risks similar social justice principles are used while discussing vulnerabilities and deservingness as for the first- and second-generation social risks. Still, there is a lack of recognition of the cumulative nature of risks and vulnerabilities. The findings presented in this paper are subject to several limitations. First, the selected media outlets might represent only selected views on the problem, and although they were chosen for their wide reach and point of reference in Slovenia, there could be other media outlets with different frames for the observed problems. Specifically, here we are referring more to the digital mediascape, social media, and others that importantly shape our reality. The findings are also limited by the inclusion of specific risks related to climate change, noting that other relevant risks were excluded from the analysis and may reveal different frames for understanding vulnerabilities and the related deservingness criteria and, in turn, different perceptions of social justice. Also, specific time period in which the risks were studied influences the results, as specific time events (such as extensive floods) or policies adopted influence the narratives within the media. Therefore, longer time periods of research in the future might reveal how robust are the findings on deservingness and vulnerability to climate change.

Moreover, our findings are based on the Slovenian context and hence cannot be generalised to other countries. However, the indicated link between the current welfare frameworks and the discussions on vulnerabilities and deservingness related to climate change might imply that a similar link exists in other countries. Notwithstanding these limitations, our findings still provide insights into media framings of particular vulnerable social groups and their deservingness and indicate the welfare state's potential for more path-dependent responses to the third-generation social risks. They are necessary for understanding the positions and support for various policies addressing climate change and helping those impacted by it, as well as conflicting perspectives in public and

media debates. The findings also reveal the need to test this based not only on wider media analysis, but especially on general public opinion. In their study, Otto and Gugushvili (2020) already pointed to a newly emerging eco-social divide, with people showing low (simultaneous) support for social as well as climate policies. In any case, the precise trade-off between the policies and the intersection of groups as well as deservingness arguments while tackling the social risks of climate change are areas warranting further research.

The temporal perspective is also vital for understanding the results given that the third-generation social risks are relatively new, and the welfare state's responses to these risks have only recently been developed, and thus we are only in the early stages of society recognising these risks and formulating responses. The observed attitudinal landscape therefore might be changing quickly, and the deservingness criteria and social justice principles in this respect could be less stable than for the traditional first- and second-generation social risks.

POGLEDI NA BLAGINJO V ČASU PODNEBNIH SPREMEMB: PRIMER SLOVENIJE

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POVZETEK

Podnebne spremembe povzročajo neposredna tveganja, kot so poplave, vročinski valovi in onesnaženost zraka, ter posredna tveganja, ki izhajajo iz politik prehoda na trajnostne vire energije in oblike mobilnosti. Ta tveganja se lahko združujejo in nesorazmerno vplivajo na že ranljive družbene skupine. Ker politike države blaginje temeljijo na javni podpori, je ključno razumeti spreminjajoče se percepcije ranljivosti, družbenih razlik, pravičnosti ter solidarnosti. Medijske razprave odražajo spremembe v dojemanju blaginje in prednostnih skupin, ki si zaslužijo pomoč, oblikujejo javno mnenje ter krepijo ali spreminjajo obstoječa pojmovanja tveganj in ranljivosti. V članku analiziramo medijske objave v dveh osrednjih slovenskih dnevnikih v obdobju od septembra 2023 do septembra 2024. Osredotočamo se na prikaz neposrednih tveganj (poplave, vročinski valovi, onesnaženost zraka) ter posrednih tveganj (energetski in mobilnostni prehod), pri čemer preučujemo, katere skupine so predstavljene kot ranljive in ali se jih obravnava kot upravičene do pomoči socialne države. Rezultati analize ponujajo vpogled v medijsko reprezentacijo ranljivih skupin in njihove upravičenosti do podpore ter razkrivajo prisotnost univerzalističnega pristopa in pristopa, ki temelji na zaslugah, skladno z obstoječimi načeli socialne pravičnosti v slovenski državi blaginje. Ugotovitve poglabljajo razumevanje, kako medijske naracije soustvarjajo solidarnost, ter imajo pomembne implikacije za oblikovanje družbeno legitimnih in vključujočih podnebnih in socialnih politik.

Ključne besede: država blaginje, podnebne spremembe, zaslužnost, ranljive skupine, mediji

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EXPLORATORY OBSERVATIONS ON METAPHORICAL CONVERGENCE IN MEDIA DISCOURSE: ENGLISH-INFLUENCED METAPHORICAL EXPRESSION PATTERNS IN GERMAN AND SLOVENIAN

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ABSTRACT

This article examines whether English-influenced metaphorical expression patterns can be identified in German and Slovenian journalistic texts and whether they indicate metaphorical convergence in media discourse. The study is based on a qualitative contrastive analysis of eleven selected English–German–Slovenian examples identified through Event Registry and checked against relevant online dictionaries. Van den Broeck's descriptive model of metaphor translation is used heuristically to distinguish between image retention, substitution, paraphrase, borrowing, and conventionalization. The analysis shows that English influence is visible in both languages, but that many German forms are already lexicographically documented or discursively established, whereas the corresponding Slovenian forms more often appear as less conventionalized image-faithful reproductions.

Keywords: conceptual metaphor, metaphorical convergence, English influence, German, Slovenian

OSSERVAZIONI ESPLORATIVE SULLA CONVERGENZA METAFORICA NEL DISCORSO MEDIATICO: MODELLI DI ESPRESSIONE METAFORICA INFLUENZATI DALL'INGLESE IN TEDESCO E SLOVENO

SINTESI

Il presente articolo esamina la possibilità di identificare nei testi giornalistici tedeschi e sloveni modelli di espressione metaforica derivati dall'influsso dell'inglese, valutando se tali modelli indichino una convergenza metaforica nel discorso mediatico. Lo studio si basa su un'analisi contrastiva qualitativa di undici esempi selezionati in inglese, tedesco e sloveno, individuati tramite Event Registry e verificati mediante il ricorso a dizionari online. Il modello descrittivo di van den Broeck sulla traduzione delle metafore viene applicato in chiave euristica per distinguere tra conservazione dell'immagine, sostituzione, parafrasi, prestito e convenzionalizzazione. L'analisi evidenzia come l'influsso dell'inglese sia visibile in entrambi gli idiomi, ma che numerose forme tedesche risultano già attestate nei repertori lessicografici o consolidate nel discorso, mentre le corrispondenti forme slovene si configurano perlopiù come riproduzioni fedeli, ma meno convenzionalizzate, dell'immagine.

Parole chiave: metafora concettuale, convergenza metaforica, influsso dell'inglese, tedesco, sloveno

INTRODUCTION: PROBLEM STATEMENT, RESEARCH QUESTION, AND PURPOSE OF THIS ARTICLE

This article's starting point is the conceptual metaphor premise that metaphors are based on cognitive and cultural experiences and can therefore take on both universal and culture-specific forms. In news journalism, however, it can be assumed that metaphorical patterns no longer emerge and are transmitted exclusively within individual linguistic and cultural spheres but increasingly circulate through global processes of production and translation.[1]

Conceptual metaphor theory has demonstrated that metaphors are not merely rhetorical devices, but fundamental cognitive structural principles through which abstract concepts are understood in terms of more concrete domains of experience. At the same time, it has been repeatedly emphasized that, although metaphorical concepts may be grounded in universal cognitive and embodied experiences, their linguistic realization varies across languages and cultures. It is precisely this tension between cognitive universality and cultural specificity that makes conceptual metaphors particularly relevant for cross-linguistic studies (Makulkina, 2013, 39–45).

In news journalism, however, an additional dynamic comes into play: news regarding international events often originates in English before being translated into other languages. In the digital media landscape, this transfer is frequently carried out by machines first, with editorial processing taking place only later. This raises the question of whether metaphorical concepts and their linguistic realizations from English-language discourse may be finding their way into other language areas. Although conceptual metaphor research generally acknowledges cultural variation, the extent to which automated translation processes contribute to the adoption, stabilization, or hybridization of such metaphors in journalistic news texts remains insufficiently investigated.

This article therefore addresses the following research question: To what extent can selected English-influenced metaphorical expression patterns be identified in German and Slovenian journalistic texts, and to what extent may they be interpreted as preliminary indications of metaphorical convergence at the level of linguistic expression? The aim is not to provide broad quantitative conclusions about metaphorical convergence in German and Slovenian media discourse, but to offer exploratory qualitative observations on selected examples and to point to a phenomenon that merits further corpus-based and diachronic research.

Against this backdrop, the article examines metaphorical patterns in German and Slovenian journalistic texts – particularly in news reports and political commentaries – from a contrastive perspective. The focus is on whether, and in what form, English–influenced metaphorical patterns are adopted into German and Slovenian media, replicated through close translation, or editorially adapted.

The specific starting point of this study is the observation that, when reading and listening to current news and political commentary in German and Slovenian, there is a growing influence of English patterns of expression and interpretation on the metaphorical language of both languages. This is particularly evident in reporting on topics closely linked to the English-speaking political and media sphere, such as those related to the United States or international conflicts.

The question of how such metaphorical patterns find their way into German and Slovenian media discourse cannot be conclusively answered within the scope of this article. However, several possible explanations can be identified. On the one hand, the adoption of certain patterns of expression may be thematically driven: when reporting on political actors, conflicts, or events from the English-speaking world, journalistic phrasing is often modeled after established interpretive and linguistic patterns there. This is particularly true for correspondents and commentators that report directly from these contexts and are thus more strongly influenced by the local political and media language. On the other hand, a key factor is likely to lie in the news production process itself: international news is often first written in English, then machine-translated, and only afterward edited. It is precisely in this interplay of English-language source material, machine translation, and journalistic editing that metaphorical patterns may be transferred to other languages, only partially adapted to the conventions of the target language, or gradually stabilized in media discourse.

CONCEPTUAL METAPHORS FROM THE COGNITIVE LINGUISTIC PERSPECTIVE

One of the most important findings of modern metaphor research is that metaphors not only serve linguistic communication but also function as cognitive tools that structure people's thinking (Bratož, 2010, 9).

From a broad perspective, approaches to metaphor theory can be classified into two basic categories: non-constructivist and constructivist. Non-constructivist

1 This article was written within the framework of the research programme "Slovenian Language – Basic, Contrastive and Applied Research" (No. P6-0215), funded from public funds by the Slovenian Research and Innovation Agency (ARIS).

perspectives view metaphors primarily as rhetorical and stylistic embellishments of speech, whereas constructivist approaches understand them as the result of mental construction processes (Begonja & Rončević, 2015, 328). It was not until the late twentieth century, in connection with the development of cognitive science, that the understanding of metaphors was systematically expanded to include a cognitive dimension. This constructivist-cognitive perspective draws its key theoretical foundation from Lakoff and Johnson's cognitive theory of metaphor, which they developed in their 1980 book *Metaphors We Live By*. Lakoff and Johnson challenged the traditional view that metaphors primarily belong to literary, poetic, or ornamental language. Rather, they showed that metaphors fundamentally shape everyday life and permeate not only language but also thinking and actions: The everyday conceptual system through which people organize, understand, and act in the world is thus fundamentally structured by metaphors (Lakoff & Johnson, 1980, 3). Metaphors are therefore not peripheral linguistic phenomena, but rather basic cognitive patterns that organize the understanding of the world. A theoretically groundbreaking assumption in this context is that cognitive processes themselves are organized metaphorically and that this metaphorical structure is reflected in linguistic expression.[2] Metaphor thus takes center stage in cognitive linguistics, which, as a subfield of cognitive science, is interdisciplinary in nature and draws on insights from disciplines such as neurology, psychology, philosophy, computer science, and sociology.

Lakoff and Johnson define metaphors differently from traditional metaphor research. When they speak of metaphors, they are primarily referring to conceptual metaphors (or metaphorical concepts), which must be distinguished from concrete, explicit linguistic formulations, or metaphorical expressions. Conceptual metaphors thus arise at the level of thought and are fundamental to the perception and structuring of people's knowledge of the world. Because they are anchored in human thought, they become visible only through the metaphorical expressions that stem from them on the linguistic surface. Metaphorical expressions should therefore not be considered in isolation, but rather as linguistic realizations of the conceptual metaphors underlying them: "[m]etaphorical language is a surface manifestation of conceptual metaphor" (Lakoff, 1993, 244).

Metaphorical expressions appear in concrete linguistic forms – namely at the level of words, phrases, sentences, or texts – but their meaning cannot be explained by these linguistic forms alone. Rather, the underlying cognitive approach is decisive: metaphorical concepts are often not consciously accessible to people, yet they are reflected in linguistic expression and can be empirically studied precisely because of this. Or, as Lakoff and Johnson (1980, 3) put it: "Since communication is based on the same conceptual system that we use in thinking and acting, language is an important source of evidence for what that system is like." This distinction is important for the present study because not all metaphorical patterns circulate across languages in the same way. As Massey and Ehrensberger-Dow (2017, 174–175) point out, complex conceptual metaphors are often subject to culture-specific variation. Their cross-linguistic circulation is therefore especially relevant for contrastive analysis, since it may reveal both shared conceptual structures and language- or culture-specific forms of metaphorical realization.

Despite its fundamental importance, conceptual metaphor theory (CMT) is not without conceptual problems. It has been pointed out, in particular, that Lakoff and Johnson use the term *metaphor* ambiguously (Makulkina, 2013, 32); in CMT, linguistic and cognitive processes are equated, and metaphors as linguistic constructions are not clearly distinguished from concepts as mental entities; the term *conceptual metaphor* is characterized by "confusing vagueness" (Schwarz-Friesel, 2015, 145–147).

Lakoff and Johnson's thesis on the cognitive nature of metaphor gives rise to another central assumption of conceptual metaphor theory, the "ubiquity thesis"; namely, the ubiquity of metaphor (Jäkel, 2003, 40). This states that metaphors should not be understood as exceptional phenomena or mere stylistic devices, but rather as ubiquitous in language use. The idea of the ubiquity and communicative indispensability of metaphors is not entirely new, however, it can already be found in semantic interaction theory as well as in discursive approaches to metaphor research. It was Lakoff and Johnson, however, that emphasized with particular clarity that metaphors are not limited to literature, poetry, or rhetorically marked language, but also fulfill an important function in technical expert discourse,[3] as well as in nearly all areas of everyday and public communication.

2 Lakoff and Johnson later put it even more succinctly: "Metaphor is primarily a matter of thought and action and only secondarily a matter of language" (Lakoff & Johnson, 1980, 153). And further: "Metaphors as linguistic expressions are possible precisely because there are metaphors in a person's conceptual system" (Lakoff & Johnson, 1980, 7). This shifts the functional principle of the metaphor from the linguistic to the conceptual level – that is, to the level of cognition.

3 Veronesi (2011, 92) notes that legal scholars' contemporary views on metaphors have changed significantly. Whereas metaphors were often viewed with skepticism in the past, some thinkers within modern legal scholarship and philosophy are increasingly recognizing their importance. Metaphors are no longer seen merely as a stylistic device or a potential threat to conceptual precision, but are also recognized as an important tool in the development of legal theory.

METAPHORS IN MEDIA DISCOURSE: METAPHORS AS DISCURSIVE TOOLS FOR SHAPING PUBLIC OPINION

The creation of metaphors is considered an expression of cognitive and linguistic creativity. Metaphors arise as a result of semantic-conceptual processes motivated by the need to make areas of experience that are difficult to visualize or abstract more accessible. They make it possible to grasp and describe complex or difficult-to-illustrate aspects of experience with the help of concrete and familiar concepts. In this process, metaphorization is based on the conceptualization of one cognitive or psychological domain through another domain. Metaphors therefore occur particularly where new or elusive areas of experience (e.g., cognitive and social processes, emotions, technical innovations, and ideologies) must be linguistically articulated and no established terms exist yet – as already emphasized – not only in literature and poetry, but also in scholarly discourse (Schwarz & Chur, 2007, 107–108; Schwarz-Friesel, 2015, 143).

In addition to these referential and insight-promoting functions, metaphors also serve persuasive – and at times manipulative – purposes in both everyday and mass media discourse. It is precisely because of their persuasive function that the mass media frequently resort to metaphors. "The persuasive power of metaphors lies in the fact that they aim at persuasion rather than conviction and appeal to the listener's emotional and behavioral components." Furthermore, metaphors "transform facts and models of thought into general truths and thus elude rational argumentation" (Makulkina, 2013, 63). In this sense, metaphors can be understood as a form of pseudo-argumentation in which positive or negative associations are transferred to the subject matter being described. As such pseudo-arguments, they are an effective tool in journalistic presentation because they suggest evaluations without having to explicitly justify them.

Metaphorical expressions highlight certain aspects of a situation while pushing others into the background; their impact is based largely on the inferences and mental models they trigger in the audience, which can influence collective processes of perception, evaluation, and opinion formation in mass media discourse (Schwarz-Friesel, 2015, 144; Korošec, 1998, 21). As Begonja and Rončević (2015, 331) point out, metaphors also have an evocative function: they activate emotions and bodily affects, which gives them a particular force in political and media discourse.

The concept of linguistic actualization is closely linked to the persuasive function of metaphors. According to Korošec (1998, 17), actualization should not be understood as mere formal rhetorical embellishment, but rather as a deviation from the direct designation of the subject matter. Through it, the text producer intervenes in the reality that has already been recognized and linguistically reformulated while at the same time seeking a path to the addressee by drawing on the addressee's world of experience and attempting to trigger both his rational and emotional responses.

Because the language system allows for a choice between options that are expressively similar but connotatively different, the decision to use a particular linguistic device is not neutral. Rather, it is tied to the communicative situation, the communicative intent, the text type, and the relationship to the audience. In journalistic news texts, therefore, "actualisms" (i.e., stylistically marked linguistic means) do not primarily appear as ornamental stylistic devices, but rather as means of evaluation and guiding interpretation. Their connotative value is of great importance for assessing persuasive effects because they can help shape recipients' understanding of the content presented (Udovič & Kalin Golob, 2019, 592). In this context, metaphors can also serve as a means of actualization (Korošec, 1998, 21): they not only name facts differently but also frame them from a particular perspective, activate certain areas of experience, and thereby enable specific interpretations.

Korošec (1998, 20) also includes phraseological units or idioms among the ways through which authors can express their stance or stylistically enliven the text. It is therefore necessary at this point to briefly clarify the relationship between idioms and conceptual metaphors. Conceptual metaphors primarily belong to the cognitive level; they structure abstract realms of experience by drawing on more concrete domains. Idioms, in contrast, are phraseologically fixed linguistic units whose meaning cannot always be fully deduced from their individual components. However, the two levels can overlap because many idioms are based on metaphorical conceptualizations and can thus be understood as linguistic realizations of conceptual metaphors. For example, the conceptual metaphor LEBEN IST EIN WEG 'LIFE IS A JOURNEY' manifests itself in various linguistic forms, such as in the compound *Lebensweg* 'life path' (personal life journey), in the collocation *seinen Weg machen* 'to make one's way' (to get ahead in life, assert oneself, be successful), or in more idiomatic expressions such as *vom Weg abkommen* 'to stray from the path' (to lose focus, lose sight of the goal, deviate from one's previous standards and principles, fail). This shows that metaphors and idioms are not the same thing: metaphors primarily refer to a conceptual organizing principle, whereas idioms refer to a fixed phraseological form of expression that may or may not be metaphorically motivated (Kispál, 2020, 443–444).

MASS MEDIA AND MEDIA REALITY

Since the present study focuses on metaphorical expression patterns in journalistic texts, the following section discusses how mass media contribute to the construction of media reality and how linguistic means, including metaphors, help shape the interpretation of public events.

Niklas Luhmann emphasizes the fundamental importance of the mass media for understanding society and the world:

> *What we know about our society – indeed, about the world in which we live – we know through the mass media. This applies not only to our knowledge of society and history, but also to our knowledge of nature. What we know about the stratosphere is akin to what Plato knows about Atlantis: we've heard about it.* […] *On the other hand, we know so much about the mass media that we cannot trust these sources. We defend ourselves by suspecting manipulation, but this leads to no significant consequences because the knowledge derived from the mass media naturally coalesces into a self-reinforcing structure. We label all knowledge as suspect – and yet we must still build upon it and rely on it.* (Luhmann, 1996, 9–10)

Communication is generally based on the exchange of signs between at least two participants. Public communication, on the other hand, is characterized by the fact that it is generally accessible to the public and generates a shared body of knowledge that can be assumed to be common knowledge within society. Mass communication is a specific form of such public communication. It allows organized communicators to reach a geographically dispersed and potentially unlimited audience, whereby the possibilities for immediate feedback remain comparatively limited (Vowe, 2021, 607). Mass communication is made possible by mass media; these include the press, radio, television, and the internet, as well as, in a broader sense, other technical dissemination media through which information, entertainment, and cultural content are conveyed to a wide audience in written, audio, and visual form. "With each new medium, an ever-larger audience is drawn into public communication" (Vowe, 2021, 607).

Media systems are shaped by historical, cultural, and political factors and therefore differ in their structures and developmental trajectories. However, transnational developments such as globalization, economic interdependence, European integration, and digital platformization have a homogenizing effect. Platform providers operating on a global scale, in particular, are fundamentally transforming traditional media systems because they no longer merely provide technical communication spaces but are increasingly gaining journalistic and political relevance, thereby influencing forms of public communication, the distribution of media power, and the formation of public opinion (Vowe, 2021, 608).

The media play an extremely important role in shaping society's perceptions of reality because they do not convey information about events, actors, and contexts in a neutral manner; rather, they select, organize, weigh, and interpret it. This mediating function is particularly significant in foreign news coverage because audiences are usually unable to directly verify the facts presented. "Media reports serve, so to speak, as a 'window to the world,' complementing people's own experiences or, not least, compensating for the lack of direct contact with other cultures" (Makulkina, 2013, 59).

Another important aspect is that not all events become public knowledge; rather, only those that "possess certain qualities that make them newsworthy" and are able to overcome the so-called "news barrier" do so (Crudopf, 2000, 20). These selection criteria are referred to as "event factors" or "news factors" and encompass those characteristics of events that increase their newsworthiness, such as timeliness, novelty, drama, conflict, or social relevance (Crudopf, 2000, 20). In this way, the media help determine "what becomes a public issue, what relevance it is accorded, and how it is reported" (Makulkina, 2013, 58). Thus, the media do not merely reflect public opinion but actively help shape it. This process of selection and presentation gives rise to a specific media reality. Through media attention and repeated coverage, events become what are known as "discursive events", which "generate a strong media response and thus become the subject of discourse" (Makulkina, 2013, 58). Collective perceptions of reality emerge from them. This can lead to entrenched stereotypes, preconceived notions, or distorted perceptions, particularly when foreign countries and cultures are portrayed. Makulkina (2013, 59) emphasizes that the media use the same "filters" not only when reporting on foreign countries but also on domestic issues. Thus, reality as such is not reflected; rather, a new media reality is created.

However, media reality is not created solely by the selection of newsworthy events and the placement of topics, but also by the specific linguistic and visual presentation of journalistic texts. Therefore, the following section provides a brief overview of the characteristics that define the news style and the linguistic and visual means used to convey explicit – and, in particular, implicit – evaluations in news texts.

Journalistic texts are required to present complex issues in a concise, understandable form that is accessible to a wide audience. The news style, in particular, therefore calls for linguistic conciseness: information must be distilled, organized, and phrased in such a way that it can be grasped quickly.

The news style is characterized by simple word choice, short sentences, and clear sentence structure. In addition, it draws on collective symbols and linguistic stereotypes of everyday awareness. Such standardization is consistent with the principles of linguistic economy and linguistic conciseness (Lüger, 1995, 23).[4]

In addition, journalists have other tools at their disposal when crafting press releases that contain an evaluative component and can thus implicitly convey personal or editorial judgments. A distinction must be made between explicit evaluations, which are stated outright, and implicit evaluations. Implicit evaluations do not appear as overt value judgments but are embedded in the news text or can be introduced into it through certain linguistic and visual means. Precisely because they are difficult for readers to recognize as evaluations, they can be particularly effective at the suggestive and emotional level of the audience's perception. This creates the impression that readers have arrived at the given assessment on their own. Linguistically, implicit evaluations may be achieved through more lexically complex means, such as metaphors, implicit stereotypes, symbols, rhetorical devices, phraseological units, and syntactic structures. They may also be conveyed visually through layout, photographs, images, caricatures, graphics, or the placement of a news item (Makulkina, 2013, 63).

METAPHORS IN CROSS-LINGUISTIC TRANSFER

Cognitive metaphor theory is relevant not only to the analysis of metaphorical expressions within individual languages, but also to translation studies because it focuses on the conceptual foundations of metaphorical meaning-making. From this perspective, it is possible to examine how metaphorical expressions are handled in the relationship between the source and target texts during translation, and what consequences the resulting translation decisions may have for the text, its reception, and further discursive developments (Schäffner, 2004).

Massey and Ehrensberger-Dow (2017, 174) emphasize that conceptual asymmetries between languages pose a particular challenge in interlingual transfer, since they require not only comprehension of the source expression but also problem awareness, problem identification, problem solving, and the formulation of functionally analogous target-language concepts. This is particularly relevant for metaphorical expressions, which function as linguistic realizations of underlying conceptual mappings and may therefore differ not only lexically, but also in terms of the metaphorical images they activate.

In a professional context, translating metaphorical expressions is generally a deliberate decision-making process. Whether the metaphorical image or expression is retained in the target text, replaced by another metaphorical image, or "resolved" – that is, paraphrased in non-metaphorical terms – depends on linguistic, cultural, text-type–specific, and functional factors. Whereas professional translators generally reflect consciously on metaphorical structures and weigh their rendering in the target text based on the factors mentioned above, the situation is different for machine translations or ad hoc translations produced in the journalistic workflow.

The question of whether metaphorical expressions are retained, replaced, or paraphrased in cross-linguistic transfer provides a useful descriptive point of departure for the present analysis, even though the examples examined here are not treated as direct translations in the strict sense. Accordingly, the question of how metaphorical expressions are transferred across languages is approached not from a normative, but from a descriptive perspective. Van den Broeck's (1981) framework is thus particularly relevant because this article does not examine idealized or normatively evaluated translations, but rather actual metaphorical patterns in media discourse. It makes it possible to identify observable forms of image-faithful borrowing, metaphorical substitution, or non-metaphorical paraphrase without simultaneously having to evaluate them as appropriate or inappropriate translation solutions.[5]

Within a descriptive framework, van den Broeck (1981, 77) distinguishes three basic approaches to the translation of metaphors: translation in the strict sense (translation 'sensu stricto'), substitution, and paraphrase:

4 According to Lüger (1995, 26), German news writing exhibits a clear tendency toward concision at the syntactic level: sentence length is shortened, noun phrases occur more frequently, and the use of functional verb constructions such as *einen Versuch unternehmen* 'make an attempt' leads to semantic weakening or bleaching of the verbs. These developments can be explained in particular by the conditions under which news texts are produced; namely, as much information as possible must be conveyed within a limited space, often by summarizing or incorporating multiple news agency reports and other sources. The need for a concise yet precise presentation therefore favors linguistic complexity in the form of nominal style, block structure, and compound words.

5 In contrast to van den Broeck's (1981) descriptive framework, Newmark's (1981, 87–91) approach to metaphor translation is more prescriptive and aims to provide practical principles, rules, and guidelines for translation and translator training. For this reason, it is less suitable for the present study.

Table 1: Modes of metaphor translation according to van den Broeck (1981).

SL metaphor	TL expression	Matching pattern	Transl. mode
La nuit tombe	Die Nacht fällt ein*	corresponding T corresponding V	Translation 'sensu stricto'
Le jour tombe	Der Tag fällt	corresponding T corresponding V	
Le jour tombe	Die Nacht bricht (her)ein**	corresponding T different V	Substitution
Le jour tombe	Es wird Abend	corresponding sense	Paraphrase

* '[T]o start suddenly, to begin, to set in suddenly' (*der Winter, dichter Nebel fiel ein* 'winter, thick fog set in') (DUDEN, 2026).
** [D]*ie Nacht kommt, bricht an* 'night falls' (DUDEN, 2026).

Van den Broeck (1981, 78) points out that his three modes can also be given other names. Within translation 'sensu stricto', a more precise distinction is made between literal translation and onomasiological translation:

In a literal translation,[6] both the meaning (tenor) and the figurative element / metaphorical image (*vehicle*) are rendered in the target language in a way that is largely equivalent: French *La nuit tombe* – German *Die Nacht fällt ein*. The meaning – the onset of night – is preserved, as is the metaphorical image, in which night is conceived as an event that descends or falls.

In an onomasiological translation[7] within translation 'sensu stricto', the source language's metaphorical image is transferred to the target text, even if the target language would normally use a different image to convey the same meaning. Precisely for this reason, such a transfer can seem unusual in the target text: according to van den Broeck, when the metaphorical images in the source and target languages differ, the resulting metaphor in the target text can appear either as a semantic anomaly or as a bold innovation; for example, English *to feel it in one's bones*, German *es in den Knochen spüren*, Slovenian *čutiti v kosteh*. In these cases, the source expression for 'bones' is carried over into the target languages, even though, depending on the register, other expressions would be more appropriate in German and Slovenian; for example, general and less idiomatic expressions such as German *etwas im Gefühl haben* 'to have a hunch about something' or Slovenian *imeti občutek* 'to have a feeling' or *slutiti* 'to sense', or colloquial but idiomatic expressions such as German *etwas im Urin haben* 'to have something in one's urine' or Slovenian *čutiti na vodi* 'feel in one's water', in which *voda* 'water' can be used euphemistically to refer to urine.[8] It is precisely such vivid, image-based renderings that can therefore come across as calqued or translated metaphorical expressions if they are not – or are only weakly – conventionalized in the target language.

Van den Broeck alternatively refers to substitution as semasiological translation. In this process, the underlying meaning is preserved, but the metaphorical image is replaced by a different, more common, or idiomatic image in the target language.[9] One first analyzes the meaning of the source-language metaphor (i.e., its tenor) and then searches for a different metaphorical image in the target language with approximately the same meaning. Thus, the foreign image is not adopted; rather, the meaning is recognized and metaphorically re-realized through a more appropriate image in the target language. An example would be English *to earn one's living* versus German *sein Brot verdienen* (literally, 'to earn one's bread'), Slovenian *služiti kruh* (literally, 'to earn bread'). The meaning 'to earn one's living' is retained, while the English image is not adopted literally as **sein Leben verdienen* or **zaslužiti življenje*, but instead replaced by the more idiomatic image of bread in German and Slovenian.

The paraphrase can be understood as discursive translation because the metaphor is not rendered metaphorically, but rather explained or paraphrased through its intended meaning,[10] such as English

6 Van den Broeck (1981, 78): "If the 'vehicles' in SL and TL correspond, the resulting TL metaphor will be idiomatic."
7 Van den Broeck (1981, 78): "If the 'vehicles' in SL and TL differ, the resulting TL metaphor may be either a semantic anomaly or a daring innovation."
8 Although the English, German, and Slovenian phrases *to feel it in one's bones*, *etwas im Urin haben*, and *čutiti na vodi* are different metaphorical expressions, each drawing on a different source of imagery, all three can be traced back to the same underlying concept or conceptual metaphor: INTUITION IS A DEEP PHYSICAL SENSATION.
9 Van den Broeck (1981, 77): "cases where the SL 'vehicle' is replaced by a different TL 'vehicle' with more or less the same 'tenor'."
10 Van den Broeck (1981, 77): "An SL metaphor […] is rendered by a non-metaphorical expression in the TL."

(*something/all options are*) *on/off the table*, which can be rendered non-metaphorically as German *etwas steht bzw. steht nicht zur Verhandlung* 'something is up for or not up for negotiation' and Slovenian *nekaj je/ni predmet pogajanj* 'something is / is not subject to negotiation'. In this case, the meaning is retained but the metaphorical image of options as objects on a table is abandoned.

METHODOLOGICAL APPROACH AND MATERIAL BASIS

For this study, English, German, and Slovenian news items from Event Registry were used. Event Registry is a multilingual media platform that aggregates large quantities of news articles from international, national, and local sources daily and groups them thematically or by event. For the present analysis, the platform was not used as a quantitative corpus in the strict sense, but rather as a search and indexing tool for identifying comparable media items.

The evidence is not treated as direct translations in the strict sense. Rather, the focus is on whether and how comparable metaphorical patterns of expression appear in English, German, and Slovenian media discourse. Where cross-linguistic event clusters provide relevant clues, potential translation or localization connections can be considered; however, they are not a prerequisite for the analysis.

The examples were selected because the author repeatedly encountered these expressions in English, German, and Slovenian media discourse. They are therefore not presented as statistically representative items, but as salient and recurrent examples suitable for a contrastive qualitative analysis. The selection is exploratory rather than representative: the aim was not to establish a frequency-based inventory of metaphorical expressions, but to examine analytically productive cases that illustrate different degrees of formal, metaphorical, and lexicographical alignment across the three languages.

More specifically, the examples had to be identifiable in English, German, and Slovenian media contexts, contain a recognizable metaphorical image, and allow for cross-linguistic analysis. In addition, the selection was designed to include different types of cross-linguistic alignment, ranging from lexicographically documented or discursively established equivalents to close image-based reproductions, lexical borrowings, collocation-influenced patterns, and borderline cases. The examples were identified through targeted searches for relevant English metaphorical expressions and their German and Slovenian counterparts. English expressions such as *the elephant in the room* were compared with German and Slovenian figurative equivalents such as *der Elefant im Raum* and *slon v sobi*. The event-related and cross-linguistic grouping of the articles made it possible to examine the expressions both within similar thematic contexts and across different media contexts.

The method has its limitations. Searching for metaphorical expressions captures only selected word combinations and does not allow for quantitative statements about frequency, distribution, or diachronic development. Furthermore, automated semantic grouping methods can only partially capture metaphorical uses, newly emerging loan translations, or culture-specific nuances of meaning. The results were therefore reviewed qualitatively and manually.

RESULTS OF THE EMPIRICAL STUDY

The following analysis is based on eleven selected English–German–Slovenian examples of metaphorical expression patterns in media discourse, which serve to address the research question of the article: To what extent can selected English-influenced metaphorical expression patterns be identified in German and Slovenian journalistic texts, and to what extent may they be interpreted as preliminary indications of metaphorical convergence at the level of linguistic expression? The categorization of the examples is heuristically based on van den Broeck's model, without treating the examples as direct translations in the strict sense.

The analysis of the selected examples shows that English-language metaphorical expression patterns in German and Slovenian media discourse cannot be categorized into a uniform model of adoption. Rather, a spectrum of different forms of adaptation emerges, ranging from figurative, already conventionalized equivalents to calqued figurative imitations, and borderline cases between metaphorical imitation and lexical borrowing.

Particularly striking is the asymmetrical distribution between German and Slovenian. In German, several of the expressions examined are already lexicographically documented or discursively established, such as *der Elefant im Raum* 'the elephant in the room', *auf dem Radar* 'on the radar', *tief hängende Früchte* 'low-hanging fruit', *alle Eier in einen Korb legen* 'to put all your eggs in one basket', *Gamechanger* 'game changer', or *am Ende des Tages* 'at the end of the day'. These cases demonstrate that a formal or figurative correspondence with English should not automatically be interpreted as a recent borrowing or direct translation. In Slovenian, however, no reliable lexicographical entries as fixed collocations can be found for several corresponding forms – such as *slon v sobi* 'the elephant in the

room', *na radarju* 'on the radar', *nizko viseče sadje* 'low-hanging fruit', *dati vsa jajca v eno košaro* 'to put all your eggs in one basket', *razmišljati izven škatle* 'to think out of/outside the box', *ni moja skodelica čaja* 'it's not my cup of tea', *pošiljati mešane signale* 'to send mixed signals', or *na koncu dneva* 'at the end of the day'. They should therefore be cautiously described as English-influenced onomasiological borrowings or figurative imitations. Some of the Slovenian expressions discussed here are attested in contemporary Slovenian usage and may also be found in corpus data. However, corpus attestation alone does not imply full lexicalization or phraseological conventionalization. The crucial question for the present analysis is therefore not only whether a form occurs, but whether it is established as an idiomatic Slovenian expression or whether it still appears as a close image-based rendering of an English metaphorical pattern.

Based on the examples, three groups can be distinguished. The first group consists of asymmetrical cases in which German and Slovenian do not show the same degree of conventionalization: whereas the German forms are already lexicographically documented or discursively established, the Slovenian equivalents appear more as image-faithful reproductions of English patterns.These include *the elephant in the room* (German *der Elefant im Raum*, Slovenian *slon v sobi*), *on the radar* (German *auf dem Radar*, Slovenian *na radarju*), *low-hanging fruit* (German *tief hängende Früchte*, Slovenian *nizko viseče sadje*), *to put all your eggs in one basket* (German *alle Eier in einen Korb legen*, Slovenian *dati vsa jajca v eno košaro*), and *at the end of the day* (German *am Ende des Tages*, Slovenian *na koncu dneva*).

The second group comprises pronounced cases of onomasiological adoption or close imitation of the image with a calqued character. Here, the English image is closely replicated using target-language vocabulary, even though more common or idiomatic expressions exist. This is particularly evident in *(something/all options are) on/off the table* (German *etwas/alle Optionen liegen/sind auf dem Tisch*, Slovenian *nekaj/vse možnosti so na mizi*),[11] in *not my cup of tea* (German *nicht meine Tasse Tee*, Slovenian *ni moja skodelica čaja*) and in *to think outside the box* (German *außerhalb der Box denken*, Slovenian *razmišljati izven škatle*). In these cases, the English image structure is preserved; they are therefore particularly significant for the thesis of metaphorical convergence at the level of expression.

A special case is *to send mixed signals* (German *gemischte Signale aussenden*, Slovenian *pošiljati mešane signale*). Here, a completely new metaphorical image is not adopted because the signal image is fundamentally available in both German and Slovenian. What is striking, however, is the collocative proximity to English: the phrase *mixed signals* is relatively closely modeled with *gemischte Signale* or *mešani signali*, although more idiomatic formulations such as German *widersprüchliche Signale senden* 'to send conflicting signals' or Slovenian *pošiljati protislovna sporočila/signale* 'to send contradictory messages/signals' would be more natural. This case can therefore be described as a collocation-influenced, image-based imitation.

The third group comprises cases at the intersection of lexical borrowing and metaphorical imitation. *Game changer* combines lexical borrowing and metaphorical imitation: German *Gamechanger* is already lexicographically attested, but it remains recognizable as an English lexeme; Slovenian *game changer* is to be understood as an Anglicism, whereas *spreminjati igro* 'to change the game' imitates the English game imagery with Slovenian vocabulary. *Good cop, bad cop* also belongs to the borderline cases because the expression appears predominantly as an English collocation in German, whereas Slovenian *dobri in slabi policist* 'good and bad policeman' or *strategija dobrega in slabega policista* 'good and bad policeman strategy' can be described as a figurative imitation.

Overall, the examples examined display varying degrees of image faithfulness, imitation, substitution, borrowing, and conventionalization in media discourse. They suggest preliminary evidence of metaphorical convergence, which is particularly evident at the level of concrete metaphorical expressions. Whether such expression-level convergence may, over time, contribute to more stable conceptual convergence remains an open question that would need to be examined through broader corpus-based and diachronic studies.

The following table summarizes the eleven examples, their German and Slovenian counterparts, and the proposed classification of each case.

11 Image-faithful reproduction with the character of a calque, but with a connection to a table image already available in German and Slovenian. The expression *etwas auf den Tisch legen* is lexicographically attested in the sense of 'to officially bring something to someone's attention' or 'to submit/present something' (Duden: *etwas auf den Tisch* [des Hauses] *legen (etwas* [offiziell] *zur Kenntnis bringen, vorlegen; wohl eigentlich = dem Parlament* [= dem hohen Haus] *etwas vortragen)*. In Slovenian, the table image is lexicographically attested in connection with talks and negotiations, for example in expressions such as *sesti za konferenčno mizo* or *sesti za zeleno mizo*. However, the specific structure *etwas/alle Optionen liegt bzw. liegen/sind auf dem Tisch* and *nekaj/vse možnosti so na mizi* in the sense of 'something is under discussion or subject to negotiation' cannot be shown to be a fixed, lexicographically codified expression in the same way.

Table 2: Table with English–German–Slovenian examples.

No.	Metaphorical expression: English*	German**	Slovenian***
1	*the elephant in the room*: a major problem or question that everyone in a group knows about but deliberately avoids mentioning, usually because it is awkward, controversial, or easier not to discuss	*der Elefant im Raum*	*slon v sobi*
	German: an identical, conventionalized equivalent. In German, the phrase *der Elefant im Raum* is already attested in dictionaries with this meaning. Other common alternatives include *Tabuthema* 'taboo topic' or *offenes Geheimnis* 'open secret'. **Slovenian: Onomasiological borrowing / image-faithful reproduction with the character of a calque.** The English-language "elephant" image is reproduced using target-language vocabulary, even though *javna skrivnost* 'open secret' or *pomesti pod preprogo* 'to sweep under the rug' would be more common or idiomatic. This is a striking example because the English figurative structure is reproduced very closely.		
2	*on the radar*: used to say that people's attention is on something	*auf dem Radar*	*biti na radarju*
	German: identical, conventionalized equivalent. The term *Radar-Bild* 'radar image' is already familiar in German in the sense of attention, perception, or focus, and it is attested in lexicographical sources (*auf dem Radar haben 'to have on the radar', auftauchen 'to appear', verschwinden 'to disappear'*). Depending on the context, also *im Blick(feld) haben/behalten/stehen* 'to have/keep/be in one's line of sight', *im Visier haben* 'to have in one's sights', *unter Beobachtung stehen 'to be under observation'.* **Slovenian: onomasiological borrowing / image-faithful reproduction. In Slovenian the expression** *biti na radarju* 'to be on the radar' sounds more like an English-influenced imitation of the English phrase *on the radar*. Depending on the context, conventionalized expressions such as *biti pod drobnogledom '*to be *under the microscope'*, *biti pod nadzorom '*to be *under supervision'*, *biti v središču pozornosti* 'to be the center of attention' would be more natural in Slovenian.		
3	*(something/all options are) on/off the table*: (of a plan, suggestion, etc.) offered to people so that they can consider or discuss it	*(etwas/alle Optionen liegen/sind/sind nicht) auf dem Tisch*	*vse/nekaj (načrt, predlog) je/ni na mizi*
	Onomasiological borrowing / image-faithful reproduction with the character of a calque. The "on the table" idiom is closely reproduced. Depending on the context, possible German equivalents for *on the table* include *zur Diskussion* 'up for discussion', *Debatte* 'debate', *Prüfung* 'testing', *Erwägung stehen* 'to be under consideration', *zur Beratung* 'up for review', *Verhandlung vorliegen* 'to be up for negotiation', *auf der Tagesordnung stehen* 'to be on the agenda', and in Slovenian *biti predmet razprave/obravnave* 'to be the subject of discussion/deliberation', *biti v obravnavi* 'to be under consideration', *biti na dnevnem redu* 'to be on the agenda' are possible. For the expression *all options are on the table*: German *alle Optionen stehen zur Diskussion / werden geprüft / bleiben offen* 'all options are up for discussion / will be tested/remain open', Slovenian *vse možnosti so odprte* 'all options are open'.		
4	*low-hanging fruit*: the things that are easiest to achieve out of a set of tasks or goals	*die tief hängenden Früchte*	*nizko viseče sadje*
	German: identical, conventionalized expression. The image of *tief hängenden Früchte* 'low-hanging fruit' refers to easily attainable goals, obvious opportunities, or measures that can be carried out with comparatively little effort; in German, this meaning is already familiar and can therefore be considered a conventionalized equivalent to English *low-hanging fruit*. **Slovenian: onomasiological borrowing / image-faithful reproduction.** Slovenian *nizko viseče sadje* can be described as an onomasiological borrowing / a close imitation of the word. Depending on the context, common Slovenian equivalents would be *na dosegu roke* 'within reach', *lahko dosegljivi cilji '*easily achievable goals', *lahka zmaga '*easy victory'.		
5	*to put all your eggs in one basket*: to rely on one particular course of action for success rather than giving yourself several different possibilities	*alle Eier in einen Korb legen* (DWDS: "im Zusammenhang von Kapitalanlagen, InvestitionenVermögen in mehrere Geldanlagen investieren, breiter streuen, um so Risiken zu minimieren" 'In the context of capital investments, investing assets in several investments, diversifying more broadly to minimize risks')	*dati vsa jajca v eno košaro*
	German: identical, conventionalized expression. The English idiom *put all your eggs in one basket* refers to the risk of making everything dependent on a single possibility, strategy, or course of action. In German, the phrase *alle Eier in einen Korb legen* 'to put all the eggs in one basket' is already lexicographically documented with this meaning, particularly in the context of capital investments, where it denotes a lack of risk diversification. It can therefore be considered a conventionalized equivalent. The German idiom *nicht alles auf ein Pferd / eine Katze / eine Karte setzen* 'to not bet everything on one horse/cat/card' is also common. **Slovenian: onomasiological borrowing / image-faithful reproduction with the character of a calque.** Slovenian equivalents that are less figurative but more common would vary depending on the context: *ne staviti vsega na eno karto '*to *not bet everything on one card'*, *ne staviti vsega na enega konja 'to not bet everything on one horse'*, *ne zanašati se samo na eno možnost* 'to not rely on just one option', or *razpršiti tveganje 'to spread the risk'.*		

* The definitions for most of the English metaphorical expressions were taken from the online Oxford Learner's Dictionaries (2026) and Merriam-Webster (2026).
** The German expressions were checked in the online dictionary resources DWDS (2026) and DUDEN (2026).
*** The Slovenian expressions were checked in the online dictionary portal (Fran, 2026).

6	*to think out of/outside the box*: to think about something, or how to do something, in a way that is new, different or shows imagination	*außerhalb der Box denken*	*razmišljati izven škatle*
	Onomasiological borrowing / image-faithful reproduction with the character of a calque. The English box image is closely reproduced in the literal German and Slovenian forms *außerhalb der Box denken* and *razmišljati izven škatle*. In German, however, *über den Tellerrand blicken/schauen* 'to look beyond one's own horizon' or *um die Ecke denken* 'to think laterally/ unconventionally' would be more common and idiomatic. In Slovenian, the expression *razmišljati zunaj ustaljenih okvirov* 'to think outside established frameworks' is widely used and more natural, although it does not appear to be fully lexicographically documented as a fixed expression. Depending on the context, alternatives such as *gledati širše* 'to look more broadly' or *razmišljati nekonvencionalno* 'to think unconventionally' may also be appropriate.		
7	*game changer*: a person, idea, or event that completely changes the way a situation develops	*Gamechanger* (also *Game-Changer*)	*spreminjati igro / game changer*
	German: identical, conventionalized expression. In German, the English lexeme *game changer* is directly adopted and already lexicographically documented. **Slovenian:** Similarly, the Slovenian form *game changer* can be considered an Anglicism or **lexical borrowing**. In contrast, the Slovenian form *spreminjati igro* 'to change the game' replicates the English game imagery using target-language vocabulary and can therefore be described as **onomasiological borrowing** or image-faithful reproduction. Other conventional German equivalents would be, for example, *Wendepunkt 'turning point'*, *Durchbruch 'breakthrough'*, *entscheidende Veränderung 'decisive change'* or *entscheidender Faktor 'decisive factor'*, in Slovenian *prelomnica 'turning point'*, *preboj 'breakthrough'*, *odločilna sprememba 'decisive change'*, or *odločilen dejavnik 'decisive factor'*. Collocations such as German *die Spielregeln verändern 'to change the rules of the game'* or Slovenian *spremeniti pravila igre* (*idem) are also metaphors based on games, but they describe more the change in the framework conditions and are therefore only suitable as analogies depending on the context*.		
8	*to send mixed signals*: a showing of thoughts or feelings that are very different from each other	*gemischte Signale aussenden*	*pošiljati mešane signale*
	Onomasiological borrowing / image-faithful reproduction with partial conventionalization. The English signal pattern is closely replicated both formally and semantically. A more appropriate choice in the target language would be German *widersprüchliche Signale senden* 'to send conflicting signals', *uneinheitliche Botschaften vermitteln* 'to convey inconsistent messages', and Slovenian *pošiljati, dajati, posredovati protislovna sporočila* 'to send, give, convey contradictory messages'.		
9	*not somebody's cup of tea*: not what somebody likes, is interested in, or is good at	*nicht meine Tasse Tee*	*ni moja skodelica čaja*
	Onomasiological borrowing / image-faithful reproduction with the character of a calque. The culture-specific English image of tea is replicated, although in German *nicht mein Ding* 'not my thing' and in Slovenian *ni po mojem okusu* 'it is not to my taste', *ni zame* 'it is not for me', *me ne zanima* 'I'm not interested in it', or *to mi ne leži* 'I don't like that' would be more common or idiomatic. The case is marked because the English image structure is very closely replicated. As a metaphorical substitution one could consider, for example: not my cup of tea → *nicht mein Ding* 'not my thing' / *ni po mojem okusu* 'it is not to my taste'.		
10	*at the end of the day*: *(informal)* used to introduce the most important fact after everything has been considered	*am Ende des Tages* (Duden, DWDS: "Lehnübersetzung zu gleichbedeutend *at the end of the day*" 'Loan translation of *at the end of the day* with the same meaning')	*na koncu dneva*
	German: identical, conventionalized expression. In German, the phrase *am Ende des Tages* in this meaning ('ultimately' or 'when everything is taken into account') is already lexicographically documented, at least with the note "loan translation". Other common alternatives are *unter dem Strich* 'bottom line', *alles in allem* 'all in all', *im Grunde* 'basically'. **Slovenian: Onomasiological borrowing / image-faithful reproduction with the character of a calque.** The image structure of *at the end of the day* is replicated; otherwise more commonly *navsezadnje* 'after all', *konec koncev* (idem), *v končni fazi* 'in the final stage'.		
11	*good cop, bad cop*: in a broader political or media context: **a coordinated role distribution in which one actor applies pressure while the other appears more moderate, constructive, or conciliatory**	*Good Cop, Bad Cop / good cop, bad cop / guter Bulle, böser Bulle*	*dober policist, slab policist*
	A borderline case between lexical borrowing and onomasiological borrowing / image-faithful reproduction. The expression *good cop, bad cop* can be found in German media, but it appears there primarily as a lexical borrowing or Anglicism. In political or journalistic contexts, it is used metaphorically to describe a strategy in which two actors assume different roles: one accommodating or mediating, and the other tough or confrontational. In contrast, a literal German rendering such as *guter Polizist, böser Polizist/guter Bulle, böser Bulle* 'good policeman, bad policeman' is less common; depending on the context, more obvious alternatives would be phrases such as *Strategie der harten und weichen Linie* 'hardline and soft-line strategy', *Rollenverteilung zwischen Hardliner und Vermittler* 'role distribution between hardliner and mediator', or *Zuckerbrot-und-Peitsche-Strategie* 'carrot-and-stick (literally, sugar-bread and whip) strategy'. The Slovenian equivalent *dobri in slabi policist* 'good and bad policeman' or *strategija dobrega in slabega policista*, 'good / bad policeman strategy' renders the English police trope of *good cop, bad cop* using target-language terminology. Depending on the context, the Slovenian expression *palica in korenček* 'stick and carrot' may function as an idiomatic alternative.		

CONCLUSION AND PROSPECTS

This article investigated the extent to which metaphorical patterns of expression influenced by English-language media discourse can be identified in German and Slovenian journalistic texts, and whether they may be interpreted as preliminary indications of metaphorical convergence at the level of linguistic expressions. The starting point was the assumption that metaphors should be understood not only as rhetorical devices, but also as cognitive and discursive structuring instruments. Particularly in media discourse, they can condense complex issues, suggest evaluations, and activate specific interpretive frameworks. Against the backdrop of globalized news production, English-language source texts, machine translation, and editorial processing, the examples discussed here raise the question of whether metaphorical patterns of expression may increasingly circulate across languages.

The exemplary analysis of eleven English–German–Slovenian examples has shown that the metaphorical patterns examined cannot be categorized into a uniform model of adoption. Rather, a spectrum of different forms of adaptation emerges. In German, several expressions are already lexicographically attested or discursively established, whereas for several corresponding forms in Slovenian no comparably robust lexicographical evidence as fixed collocations can be found. The Slovenian examples therefore often appear as translations or as figurative imitations of English metaphorical patterns.

The study also suggests that metaphorical convergence may manifest itself at different levels. In some cases, there is a figurative, already conventionalized equivalent; in other cases, the English image appears to be reproduced relatively closely using target-language vocabulary. In addition, borderline cases can be observed in which metaphorical reproduction, lexical borrowing, collocative adaptation, and cross-linguistic circulation of media expression patterns seem to intertwine. Examples such as *not my cup of tea*, *(something/all options are) on/off the table*, *to think out of/outside the box*, *game changer*, *good cop, bad cop*, and *to send mixed signals* are particularly revealing because they indicate that English-language metaphorical patterns may enter other media languages not only as individual words, but also as images, role models, or collocative patterns.

Van den Broeck's model proved to be heuristically applicable to the analysis, as it makes it possible to describe different degrees of image faithfulness, substitution, paraphrase, imitation, and borrowing. At the same time, the study shows that the examples examined cannot simply be treated as direct translations of individual source texts. Rather, they were considered as comparable media occurrences that can provide clues to cross-linguistic metaphorical adaptation.

The scope of this study is deliberately limited. It is not a comprehensive corpus-based or diachronic study, but rather an exemplary qualitative analysis of selected examples. Therefore, no quantitative statements can be made about the frequency, dissemination, development, or stabilization of the expressions examined. Likewise, this article cannot definitively clarify how the respective metaphorical patterns entered German and Slovenian media discourse: through direct translation, machine pre-translation, journalistic orientation toward English-language discourse, parallel metaphorical development, or the general internationalization of media expressions.

However, these very boundaries also mark the starting point for further research. A broader study would need to include larger German–Slovenian–English press corpora, systematically search for metaphorical patterns, and examine their development diachronically. In particular, it would be necessary to investigate which expressions appear only sporadically and in marked instances, which become conventionalized over the long term, and whether more stable metaphorical interpretive patterns gradually emerge from repeated image-faithful imitations. Likewise, it would be important to examine the role that machine translation, news agencies, international media platforms, and editorial processing play in the dissemination of such patterns.

To sum up, the examples analyzed suggest metaphorical convergence, which is initially most evident at the level of concrete metaphorical expressions. Whether convergence at the level of concrete metaphorical expressions may, in the long term, also affect conceptual interpretive patterns remains an open question. It can only be answered through broader, corpus-based, and diachronic studies.

METAFORIČNA KONVERGENCA V MEDIJSKEM DISKURZU: PRELIMINARNA OPAŽANJA O VPLIVU ANGLEŠČINE NA VZORCE METAFORIČNEGA IZRAŽANJA V NEMŠČINI IN SLOVENŠČINI

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POVZETEK

V prispevku obravnavamo vpliv angleškega medijskega diskurza na vzorce metaforičnega izražanja v nemških in slovenskih novinarskih besedilih. Izhajamo iz teorije konceptualne metafore in predpostavke, da metafore niso zgolj retorična sredstva, temveč kognitivni in diskurzivni instrumenti, ki strukturirajo interpretacijo, usmerjajo razumevanje kompleksnih vsebin in sodelujejo pri oblikovanju medijske realnosti. V ospredju je vprašanje, ali je v nemškem in slovenskem medijskem diskurzu mogoče prepoznati metaforične vzorce, oblikovane pod vplivom angleščine, ter ali je na podlagi njihove rabe mogoče govoriti o določeni obliki metaforične konvergence. Analiza temelji na enajstih izbranih angleško-nemško-slovenskih primerih metaforičnih izrazov, zaznanih v sodobnem medijskem diskurzu. Gradivo smo poiskali s pomočjo platforme Event Registry, ki omogoča iskanje in primerjanje novinarskih besedil v različnih jezikih. Pri raziskavi zato ni služila kot kvantitativni korpus, temveč kot orodje za izbor primerljivih angleških, nemških in slovenskih medijskih besedil. Izbrane primere smo obravnavali kvalitativno in kontrastivno, jih preverjali v spletnih slovarskih virih ter se pri analizi oprli na van den Broeckov deskriptivni model obravnave metafor v prevodnem kontekstu. Rezultati kažejo, da metaforičnih izraznih vzorcev, oblikovanih pod vplivom angleščine, ni mogoče pojasniti z enim samim modelom prevzemanja, temveč jih je treba razdeliti v več skupin: od že konvencionaliziranih metaforičnih ustreznic prek zvestih slikovnih prenosov do mejnih primerov leksikalnega prevzemanja in posnemanja metaforične podobe. Vpliv angleških metaforičnih vzorcev je razviden v obeh jezikih, vendar so številne nemške oblike že leksikografsko dokumentirane in v rabi ustaljene, slovenske ustreznice pa pogosto še niso primerljivo leksikalizirane oziroma slovarsko potrjene. Metaforična konvergenca se zato kaže predvsem na ravni konkretnih metaforičnih izrazov; vprašanje njenega morebitnega dolgoročnega vpliva na konceptualno raven pa ostaja predmet nadaljnjih korpusnih in diahronih raziskav.

Ključne besede: konceptualna metafora, metaforična konvergenca, vpliv angleškega jezika, nemščina, slovenščina

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MEDITERRANEAN TOPONYMS IN TRANSLATION

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ABSTRACT

This article examines toponymic translation in the French, Italian, and Slovene editions of Predrag Matvejević's Mediterranean Breviary. Drawing on Thierry Grass's typology of translation strategies, equivalence theory, and Mona Baker's concept of narrative framing, it analyses a corpus of 158 toponyms from the Maps section, treating the three versions as parallel texts, to examine how place names are transferred across languages and how these choices participate in the construction of distinct representations of Mediterranean space. The findings reveal variations in translation strategies, graded equivalence patterns reflecting linguistic proximity, and narrative positioning that differentiates the three versions.

Keywords: toponym translation, narrative approach, equivalence, derivational substitution, Mediterranean space

TOPONIMI MEDITERRANEI IN TRADUZIONE

SINTESI

L'articolo esamina la traduzione dei toponimi nelle edizioni francese, italiana e slovena di Breviario Mediterraneo di Predrag Matvejević. Sulla base della tipologia delle strategie traduttive di Thierry Grass, della teoria dell'equivalenza e del concetto di "narrative framing" di Mona Baker, l'articolo analizza un corpus di 158 toponimi della sezione Carte, trattando le tre versioni come testi paralleli, per esaminare in che modo i nomi dei luoghi vengono trasferiti nelle varie lingue e come tali scelte partecipano alla costruzione di rappresentazioni distinte dello spazio mediterraneo. I risultati rivelano variazioni nelle strategie traduttive, diversi gradi di equivalenza che riflettono la prossimità linguistica e un posizionamento narrativo che differenzia le tre versioni.

Parole chiave: traduzione dei toponimi, approccio narrativo, equivalenza, sostituzione derivazionale, spazio mediterraneo

INTRODUCTION[1]

Born in 1932 in Mostar, in present-day Bosnia and Herzegovina, Predrag Matvejević worked in Zagreb, Paris, and Rome.[2] He died in 2017 in Zagreb.[3] The author of over thirty essays written in Croatian, French, and Italian, Matvejević explored subjects ranging from French existentialism, examined in his 1965 essay on Jean-Paul Sartre, to questions of cultural identity, nationalism, and intercultural relations. His major work, *Mediterranean Breviary*, is a poetic essay, the result of extensive research on the Mediterranean.

Originally written in Croatian and first published in Zagreb in 1987, *Mediteranski brevijar* has since been translated into numerous languages. An Italian translation by Silvio Ferrari was first published in 1990 by Hefti Edizioni in Milan under the title *Breviario mediterraneo*. The revised and expanded Garzanti edition, *Mediterraneo. Un nuovo breviario*, followed in 1991, and a further revised edition, again entitled *Breviario mediterraneo*, appeared in 2004. The French edition, *Bréviaire méditerranéen*, translated from the Croatian by Évaine Le Calvé Ivičević, was published in 1992. The Slovene version, *Mediteranski brevir*, translated by Vasja Bratina, followed in 2000. Matvejević took an active part in the translation of his work and was closely involved in the French and Italian versions. The work comprises three sections (*Breviary*, *Maps*, and *Glossary*), which explore Mediterranean complexity through poetic reflection, cartographic representation, and historical terminology respectively.

In *Mediterranean Breviary*, Matvejević approaches toponyms as narrative devices that participate in the construction of a poetic discourse informed by Mediterranean history and cultural complexity. Beyond their referential function, place names in the work bear symbolic and ideological significance accumulated over centuries of Mediterranean history and political transformation. They embody what the author describes as "the eternal rituals of rise and fall, departure and return, grandiloquence and parody, palingenesis and palimpsest, circlemaking and circlebreaking" (Matvejević, 1999, 92). Translating these toponyms raises three questions: how translation strategies vary across the three versions, how historical factors shape the observed patterns, and how toponymic choices contribute to narrative construction. This study addresses these questions in the French *Cartes*, Italian *Carte*, and Slovene *Karte* texts of the *Maps* section, drawing on frameworks from onomastic studies and translation theory.

THEORETICAL FRAMEWORK

Onomastics, the study of proper names, encompasses toponymy as a principal branch concerned with the origin, meaning, and use of place names. Despite its interdisciplinary scope, toponymic research has struggled for institutional recognition (Murray, 1994) and, owing to "the vagaries of academic history" (Zelinsky, 1997, 465), remains dispersed across linguistics, geography, and history. Within this fragmented field, Vuolteenaho and Berg (2009, 3–7) distinguish three traditional research orientations. The philosophical orientation, traceable to Antiquity, addresses abstract questions concerning proper names and their referential capacity. Formal accounts within this tradition hold that proper names identify objects individually without describing them (Vuolteenaho & Berg, 2009, 8; cf. Searle, 1969, 163). The technical-authoritative orientation developed alongside modern state-building, when cartography and the collection of national toponymies became instruments of state administration (Harley, 1989; Vuolteenaho & Berg, 2009, 4). Rooted in philological and etymological enquiry and dominant in nineteenth-century German-speaking Europe, the historical-culturalist orientation treats toponymic layers as sources for reconstructing language, settlement history, and past landscapes (Vuolteenaho & Berg, 2009, 5–6). Vuolteenaho and Berg (2009, 6) nevertheless argue that traditional name research has "been afraid of politics" (Palonen, 1993, 103) and has failed to acknowledge its complicity in power struggles. More recent scholarship in critical toponymy draws on social theory to approach place naming as "a political practice par excellence of power over space" (Pinchevski & Torgovnik, 2002, 367). From this perspective, commemorative naming inscribes official versions of history into the cityscape (Azaryahu, 2009), street naming becomes contested terrain when marginalised groups seek recognition (Alderman, 2006), naming contributes to national narratives (Perono Cacciafoco & Cavallaro, 2023), and place names acquire economic value in urban branding (Medway & Warnaby, 2014). Linguistic

1 This paper is the result of research carried out in the research program "Theoretical and Applied Linguistic Research: Contrastive, Synchronic and Diachronic Aspects" (ARIS, P6-0218), funded by the Slovenian Research Agency (ARIS).

2 Matvejević taught comparative literature at the University of Zagreb, the Université Sorbonne Nouvelle (Paris 3), and the University of Rome "La Sapienza". In 2000 he received a Slovene state honour for his efforts to preserve the chair of Slovene at the University of Rome after the retirement of Srečko Renko (Mladina, 11. 9. 2000, 37).

3 Matvejević received numerous awards, notably the European Essay Prize of the Charles Veillon Foundation (1992), awarded for *Mediterranean Breviary*, the Best Foreign Book Prize in the essay category (Paris, 1993), and, posthumously, the Jean d'Ormesson Prize (2020) for the French edition of the Breviary. In Italy the book was also honoured with the Malaparte Prize (Capri, 1991), the Boccaccio Europeo Prize (Certaldo, 1992), the Obiettivo Europa Prize (Milan, 1995), and the Marinità Prize (Rome, 1995) (cf. Premio Malaparte (n.d.); Matvejević (1993)).

research also remains central to the study of toponyms, particularly in relation to languages in contact (Baylon & Fabre, 1982). Tent and Blair (2011, 85–86), for their part, develop a typology based on the mechanism of the naming process, identifying nine principal categories: descriptive, associative, occurrent, evaluative, shift, indigenous, eponymous, linguistic innovation, and erroneous. Their typology classifies place names by what the authors call the mechanism of naming, that is, the procedures, methods, and motivations behind a given name (Perono Cacciafoco & Cavallaro, 2023). The present study applies a comparable principle at a later stage in a name's life: where Tent and Blair (2011) classify the mechanism by which a name is first bestowed, the categories used below classify the mechanism by which an established name is carried across languages.

Toponymic forms often carry a historical weight that determines both their use and their translation, since established forms reflect centuries of cultural contact and territorial relationships rather than contemporary translation practices. In Slovene, for instance, forms such as *Oglej* (Aquileia), *Benetke* (Venice), or *Rim* (Rome) are historically established names, reflecting long-standing connections with Mediterranean space, particularly with the Patriarchate of Aquileia and the Venetian Republic. Italian forms such as *Ragusa* or *Cherso* are associated with the centuries-long Venetian presence along the eastern Adriatic coast, whilst contemporary preferences for endonyms may reflect different ideological positions (Monmonier, 2006; Vuolteenaho & Berg, 2009). Yeoh (1996, 300), for example, shows how colonial administrators used street names as markers to order and divide colonised groups into "recognisable containers". Toponymic translation thus reflects tensions between cultural memory and territorial identity, and requires approaches that account for historical and ideological factors. Ballard (1993; 2001) argues that place names are culturally marked and often ideologically motivated, and that their translation depends on cultural context as much as on formal criteria. Vaxelaire (2006, 734–738) warns against automatic translation procedures for proper names, whose semantic, contextual, and cultural complexity resists them. Within the Prolex project (Agafonov et al., 2006), Grass (2006, 667) observes that in Alsace the older Germanic forms of local toponyms are avoided when translating into German because of their pan-Germanist connotations, showing that the choice or avoidance of a toponymic form can serve to neutralise unwanted associations.

Literary translation differs from cartographic practice in its relationship to normative constraints. The United Nations Conferences on the Standardization of Geographical Names recommend reducing the use of exonyms in international use (resolution II/31, 1972), whilst recognising that certain conventional or traditional exonyms form living and vital parts of languages (resolution II/28, 1972; United Nations, 2007). These recommendations govern official and international usage. In literary translation, translators may retain established exonyms (fr. *Venise*; it. *Ragusa*) or replace them with forms adapted to the target language (sl. *Benetke*, *Dubrovnik*). This study analyses toponymic translation strategies, cross-linguistic equivalence patterns, and narrative positioning in the three versions of the *Maps* section. The analysis adopts Grass's (2006) framework, grounded in Gaston Gross's theory (1994) of object classes, to examine how translation choices convey implicit positions that may contribute to different perceptions of places. The framework is combined with approaches to equivalence (Nida, 1964; Nord, 1997; Reiss, 2000; Lederer, 2003) and with Baker's (2006) concept of narrative framing.

RESEARCH CONTEXT AND METHODOLOGY

According to Michel Arrivé, in literature, geography is toponymy (Arrivé, 2013, 47). In *Mediterranean Breviary*, toponyms form a fragmented cartography of the Mediterranean world. The analysis examined the three translations independently of the Croatian source. This approach aligns with descriptive translation studies (Toury, 1995, 29), which treat translated texts as autonomous products within target systems rather than as derivatives of an original. Moreover, Matvejević's direct involvement, particularly in the revised 2004 Italian edition, complicates the notion of a singular source text and renders direct source–target comparison less straightforward. Cross-version correspondences are therefore established against the French edition, which serves here as a *tertium comparationis*: a common baseline of comparison, adopted for methodological convenience, rather than a source from which the other versions derive. Italian and Slovene renderings are accordingly coded by reference to the corresponding French form, whilst French renderings are coded by reference to the originating form of the referent, whether a local endonym or a classical antecedent. The three columns therefore record different relations and are not directly comparable. The study focuses on how each published language version renders Mediterranean space through toponymic choices, drawing on Venuti's (1995, 17–24) conceptualisation of translation as cultural inscription. The three editions are thus examined as parallel texts, each rendering Mediterranean geography through a distinct cultural framework. The term translation strategy is accordingly used in an extended sense: it designates the relationship between corresponding forms across the published versions, not a reconstructed decision taken against the Croatian source, which distinguishes this parallel-text comparison from a classic source–target analysis. The *Maps* section was selected because it offers the most comprehensive toponymic itinerary through Mediterranean

space and the densest concentration of place names, and thus the fullest material for comparing translation strategies.

The three corpora (the *Maps* sections of each translation) were entered into Sketch Engine (https://www.sketchengine.eu/) for concordance searches and textual navigation. Toponyms were identified and extracted, resulting in a corpus of 158 toponymic referents, each counted once regardless of its number of occurrences. The inventory is defined from the French edition: the 158 referents are those attested in the French text, which serves as the baseline of comparison. Indeed, the three editions do not render a completely identical text. The revised Italian edition of 2004 contains a few passages with no counterpart in the French edition of 1992, and material present in one version is occasionally absent from another, so a small number of these referents are not rendered in the Italian or the Slovene version. Such absences are treated here as edition-level differences and fall outside the typology, which applies only to attested renderings. Variant surface forms used for the same referent (*Hesperide/Esperide* in Slovene; *Aquileia/Aquilée* in French) were recorded, but only the first-attested noun form entered the similarity calculation. Three analytical approaches were applied. Typological classification followed Grass's five-fold framework, developed within the multilingual Prolex database project (Agafonov et al., 2006): borrowing/retention, adaptation, transcription, calque, and transliteration. A sixth strategy, derivational substitution, was added to account for patterns observed in the Slovene corpus. Quantitative analysis measured formal equivalence through a graphemic similarity index, computed as normalised Levenshtein similarity (Levenshtein, 1966) between citation forms, that is, the number of character insertions, deletions, and substitutions separating two forms, divided by the length of the longer form and subtracted from 1. The comparison is case-insensitive, and diacritics count as distinct graphemes. Articles and hyphens belonging to the name (*La Mecque*, *Aix-en-Provence*) are retained, and adjectival endings are not normalised, because forms attested only as derived adjectives are excluded from the calculation. Of the 158 toponyms, 142 are attested as noun forms in all three versions and enter the calculation. The remaining 16 are excluded on two grounds: 13 lack a counterpart in at least one version (among them *Chypre*, absent from the Slovene text, and *Colchide*, *Catay*, *Ithaque*, and *Jordanie*, absent from both the Italian and the Slovene), and 3 appear in Slovene only as derived adjectives (*kirenajški*, *numidijska*, *dubrovniška* in *Dubrovniška republika*, the Ragusan Republic as distinct from the city of Dubrovnik), which belong to the derivational substitution category and have no comparable noun form. Three levels were distinguished: complete equivalence (100%), as with *Adria* in all three pairs; high equivalence (at least 75% but below 100%), as with the French–Slovene pair *Jérusalem/Jeruzalem* (77.8%); and divergent forms (below 75%), as with *Venise/Benetke* (42.9%). A 90% threshold would classify most one-character differences as divergent, whereas the 75% threshold keeps them within the high-equivalence band. Finally, narrative analysis employed Baker's (2006) framing concepts to examine how each version constructs relationships between readers and Mediterranean space. The extracted toponyms were classified into four categories: terrestrial toponyms (109 instances), including countries (21), contemporary regions (11), contemporary cities (43), ancient settlements (23), and historical regions (11); maritime toponyms (27 instances), encompassing islands, straits, gulfs, and ancient coastal ports; hydronyms (13 instances), referring to seas, rivers, and bays; and legendary or mythical places (9 instances). These four categories form a partition: each referent is assigned to a single primary category.

Corpus analysis

The Mediterranean region is understood here in an extended sense, encompassing places associated with Mediterranean civilisation beyond the coasts, and the overview below distinguishes terrestrial, maritime, hydronymic, and legendary toponyms.

Terrestrial toponyms

The terrestrial toponyms in the text refer to twenty-one contemporary countries, among them Albania, Algeria, Cyprus, Egypt, France, Greece, Israel, Italy, Jordan, Lebanon, Libya, Macedonia, Malta, Montenegro, Palestine, Spain, Syria, Tunisia, and Turkey. The text also presents eleven contemporary regions, such as Campania, Catalonia, Crimea, Cyrenaica, Dalmatia, Istria, the Maghreb, the Peloponnese, and Provence.

Forty-three contemporary cities appear: thirty-two European sites, including Adriatic cities such as Dubrovnik, Split, and Zadar; the French Mediterranean centre of Toulon; Greek cities such as Athens and Thessaloniki; major Italian centres including Florence, Genoa, Naples, and Venice (Rome is counted among the legendary toponyms); and Spanish cities such as Murcia and Valencia. Eleven cities are situated outside Europe, including the North African centres of Alexandria and Tunis; the Middle Eastern cities of Jerusalem, Beirut, Byblos, Sidon, Tyre, and Damascus; the Arabian city of Mecca; and the Anatolian city of Tarsus.

The corpus contains twenty-three terrestrial ancient settlements representing different phases of habitation in the Mediterranean region. Selected examples

include, among the European sites, the Croatian settlement of Osor; the ancient Greek foundations of Miletus and Pergamon; the historical centres of Ragusa, Delphi, Ostia, and Pompeii; and the Sicilian cities of Kimmerios, Germanossa, and Himera. Non-European ancient cities include the North African centres of Cyrene, Leptis Magna, Ptolemais, and Carthage; the Middle Eastern cities of Antioch, Caesarea, and Dor; the Anatolian settlements of Ephesus and Smyrna; and the possibly mythical Tarsis, traditionally associated with ancient Spain. Rhodes is counted among the maritime toponyms described below, owing to its role as an ancient maritime polis. Ancient coastal settlements such as Salona, Aquileia, and Phocaea are classified among the maritime toponyms described below, so the terrestrial count of twenty-three ancient settlements does not include them.

Eleven historically defined territories include the Greek lands of Argolis and Hellas, and the colonial extension of Magna Graecia; the North African regions of Ifriqiya and Numidia; the Anatolian provinces of Caria, Cilicia, and Lycia; and the ancient Tunisian centres of Thuburbo Maius and Thugga.

Maritime toponyms and hydronyms

The section features numerous maritime toponyms: straits, gulfs, islands, and ancient coastal settlements. Through toponyms such as Gibraltar, the Bosporus, the Gulf of Salerno, the Gulf of Taranto, and the Great Syrtis, the narrative portrays the region as a basin structured by maritime routes. Major Mediterranean islands named in the text include Sardinia, Majorca, Sicily, Crete, Rhodes, and Capri, alongside more symbolic islands such as Issa (now Vis), Patmos, Leucas (formerly Santa Maura), and Cythera (now Kythira); Malta and Cyprus, counted among the countries, and Ithaca, counted among the legendary toponyms, are also named as islands. Ancient coastal ports include the Adriatic centres of Salona, Aquileia, and Adria; the southern Italian and Sicilian settlements of Sybaris and Lilybaeum; the Anatolian port of Phocaea; the Cyrenaican harbours of Apollonia and Berenice; the ancient Greek foundation of Heraclea; and the Black Sea ports of Apsaros, Gorgippia, and Theodosia. Together these sites present the basin as a space of circulation extending from the Adriatic to the Black Sea.

Hydronyms articulate the Mediterranean's internal structure: the Aegean, the Ionian, the Sea of Marmara, the eastern Adriatic, and the Tyrrhenian subdivide the central sea. The French reference to the Adriatic as "la mer d'Hadria" links contemporary geography with ancient conceptions. The Danube and the Iron Gates mark a transition towards continental Europe, and the reference to the Atlantic Ocean indicates the spatial and historical scope of the narrative.

Legendary toponyms

Matvejević also integrates legendary toponyms into the symbolic geography of the Mediterranean. Their function is conceptual rather than cartographic, anchoring the narrative in a space informed by literary and mythological traditions. Among them are Ultima Thule, the Fortunate Isles, Taprobana, Panchaea, Colchis, Ithaca, Arcadia, and the Hesperides. Rome holds a dual status: a real contemporary city, it is included here because the text invokes it as the Eternal City, grounded in civilisational legacy and myth rather than in cartographic position, and in the corpus partition it is counted once, under this category. Ultima Thule marks the outer boundary of the known world. Taprobana and Panchaea locate abundance and wisdom in remote eastern lands, whilst the Hesperides and the Fortunate Isles place reward in the distant west. Colchis, tied to the Golden Fleece, introduces the theme of quest and connects the Mediterranean with the Black Sea region. Ithaca, known from the Odyssey, evokes return, nostalgia, and home. Arcadia extends the Mediterranean's role in producing utopian imagery beyond geographical reference.

TRANSLATION CHALLENGES AND STRATEGIES

Translating toponyms presents particular challenges when the languages differ in grammatical structure, naming conventions, or degrees of standardisation. In the Mediterranean context, many place names refer to regions that have disappeared or changed in scope, and the name must retain its historical value without anachronism.

Classical toponyms illustrate the range of approaches. Some names are semantically translated (*Grande Grèce/Velika Grčija*), whilst Italian tends to retain classical or Latin forms (*Magna Grecia*). Ancient toponyms such as Cilicia or Heraclea take different shapes: French uses Gallicised forms (*Cilicie*, *Héraclée*), Italian tends to preserve the classical spelling (*Cilicia*, *Heraclea*), and Slovene adapts phonetically (*Kilikija*, *Herakleja*). This variation reflects distinct phonological systems and the tension between classical consistency and the norms of each language. A comparable divergence appears in the Pytheas episode: French uses the modern toponym *Grande-Bretagne*, Italian employs the Latin form *Britannia*, and Slovene adopts the Latinised adaptation *Britanija*. In this instance French tends towards contemporary standardisation whilst Italian and Slovene privilege classicising forms. Conversely, for the navigator's home city, French retains the ancient name *Massalia* where Italian uses the modern *Marsiglia*.

Beyond formal considerations, toponym translation involves trade-offs between tradition and standardisation. The rendering of the Greek city of Thessaloniki

varies across the versions. The Slovene text uses *Solun*, a long-established Slavic form. Italian adopts *Salonicco*, the standard modern Italian toponym. The French translation uses *Thessalonique* rather than *Salonique*, the older French form, and this choice aligns with the Hellenised form and places the version between historical usage and contemporary standardisation. A comparable shift occurs with *la côte de Numidie*, rendered in Slovene as *numidijska obala* but generalised in Italian as *spiagge africane*: the French and Slovene versions preserve historical specificity, whereas the Italian prioritises contemporary geographical description. In the French translation, the use of both *Dubrovnik* and *Raguse* marks a distinction between the modern city and its historical identity as a maritime republic. Italian predominantly uses *Ragusa*, maintaining historical continuity and shifting the temporal framing towards the city's earlier political identity. Slovene adopts *Dubrovnik* or the derived adjective *dubrovniški*, showing how morphosyntactic constraints intersect with cultural positioning. Finally, certain toponyms present in one version are absent from another: *Jordanie* and *Chypre*, present in the French text, have no counterpart in the Slovene, a difference that contributes to distinct geographical representations across the editions.

Toponym translation strategies

Table 1 presents a selection of toponyms as they appear in the French, Italian, and Slovene versions. The examples are illustrative rather than exhaustive. Where relevant, coexisting forms are shown, and for the similarity calculation, only the first-attested noun form was retained. The strategies underlying these examples are analysed in the following section.

These examples point to distinct translational patterns. Slovene shows systematic adaptation through morphological integration (*Neapelj*, *solunski*, *dubrovniški*), with *Benetke* as a long-established Slovene name. Italian exhibits historical forms (*Ragusa*, *Cartagine*) rooted in Latin and Venetian traditions. French favours established exonyms, and its dual use of *Dubrovnik* and *Raguse* distinguishes modern from historical nomenclature, a form of deliberate temporal framing (Baker, 2006, 112–113). The Italian version predominantly uses *Ragusa*, whilst also providing double designations such as *Dubrovnik (Ragusa)* in some passages. The dominant choice privileges historical continuity.

Table 1: Comparative translations of selected toponyms across the French, Italian, and Slovene editions (Source: Matvejević, 1992; 2000; 2004).

French version	Italian version	Slovene version
la mer d'Hadria	il mare Adriatico	hadrianska morja
Antioche	Antiochia	Antiohija
Aquileia/Aquilée	Aquileia	Akvileja
Carthage	Cartagine	Kartagina
Dalmatie	Dalmazia	Dalmacija
Dubrovnik/Raguse	Ragusa	Dubrovnik/dubrovniški
Grande Grèce	Magna Grecia	Velika Grčija
Hespérides	Esperidi	Hesperide/Esperide
Ifriqiya	Ifrikia	Ifrikija
Jérusalem	Gerusalemme	Jeruzalem
La Mecque	La Mecca	Meka
Losin	Lussino	Lošinj
Naples	Napoli	Neapelj
Thessalonique	Salonicco	Solun/solunski
Thuburbo Majus	Thuburbo Maius	Thuburbo Maius
Toulon	Tolone	Toulon
Venise	Venezia	Benetke
Zadar	Zara	Zadar

Typological analysis

Thierry Grass developed a typology of proper name translation within the Prolex project, a multilingual database for the automatic processing of proper names (Agafonov et al., 2006). Drawing on Gaston Gross's theory of object classes (Gross, 1994), Grass (2006, 662–663) distinguishes borrowing, transliteration, and transcription, together with translation proper, which comprises calque and adaptation. The present study treats these as five strategies for the transfer of toponyms. Each of the 158 toponyms extracted from the *Maps* section has been categorised according to its dominant strategy, although overlaps are common and indicate the complexity of toponymic transfer.

Translation strategies were analysed at two levels: a global distribution assigning each toponym to a single category based on the predominant strategy across the three versions, and language-specific distributions calculated independently for each translation. In the latter approach each rendering counts separately, so that corresponding forms may be assigned to different strategy categories across the three versions. The same duality explains why derivational substitution accounts for 7.0% of toponyms globally but 17.1% of Slovene renderings: the strategy is largely confined to the Slovene version, and the global label records the treatment prevailing across the three versions. Table 2 is accordingly indicative of overall tendencies, whereas the analysis that follows rests on the language-specific distributions.

Borrowing, or direct retention, is the most frequent approach, accounting for 29.1% of cases. Complete retention occurs with names such as *Adria* and *Tripoli*, which remain unchanged across the three versions. Partial retention is more common: *Toulon* remains unchanged in French and Slovene but becomes *Tolone* in Italian, and *Cres* becomes *Cherso* in Italian. This practice corresponds to what Grass (2006, 662) identifies as the default treatment of proper names, the borrowing of a recognisable form without graphic change.

Adaptation accounts for 28.5% of the data and involves the transformation of toponyms according to target-language conventions and cultural traditions. Such forms rest on usage that has sometimes existed for centuries and depends largely on cultural factors (Grass, 2006, 663). Examples include the semantic translation *Črna Gora* for *Monténégro*; cultural adaptations such as *Solun* for *Thessalonique*, reflecting Slavic-Byzantine nomenclature, and *Meka* for *La Mecque*; and phonetic adaptations such as *Dalmacija* for *Dalmatie* and *Kartagina* for *Carthage*.

Transcription accounts for 17.1% of cases and involves the phonetic adjustment of a form to the target language's sound system. This strategy is anchored in the target language's phonological norms rather than in those of the source language, which improves readability but renders the process irreversible (Grass, 2006, 663). It appears in Slovene forms such as *Bejrut* (fr. *Beyrouth*), *Antiohija* (fr. *Antioche*), and *Efez* (fr. *Éphèse*), and in Italian *Antiochia* and *Salonicco* for the same referents as French *Antioche* and *Thessalonique*. In the French version, the form *Losin* (for *Lošinj*) shows simplification through the omission of diacritics. The Slovene forms *Pergam* and *Smirna* correspond to French *Pergame* and *Smyrne*, historical forms adjusted to Slovene phonology. The modern Turkish name *Izmir*, by contrast, is generally reserved for contemporary contexts.

Calques, constituting 13.9% of the corpus, are particularly prominent in Slovene renderings of geographical features. This strategy involves the literal translation of meaning, as in *Velika Grčija* for *Grande Grèce*, which reproduces the conceptual structure of the French phrase, used here as the reference form, with Slovene lexical resources, and *Gibraltarska ožina* for *le détroit de Gibraltar*.

Transliteration, relatively rare at 4.4%, typically arises where names derive from non-Latin alphabets. Transliteration adapts a toponym's graphic representation to the target alphabet whilst maintaining reversibility to the original script (Grass, 2006, 662–663). One notable instance is the Slovene rendering *Taršiš* for *Tarsis*, which reflects the name's Hebrew origin and adjusts it to Slovene phonology and morphology through graphemic correspondence. The French version applies the same procedure to Arabic names, retaining *Ifriqiya* and *Al-Iskandariyah* rather than the conventional French equivalents. The latter is followed in the text by the gloss *Alexandrie*, which confirms that the transliterated form is the one adopted.

Grass's typology, however, does not account for morphosyntactic transformations of the kind observed in the Slovene version. To address this gap, the present study introduces a sixth category, derivational substitution, observed in 7.0% of cases and concentrated in the Slovene corpus. This strategy differs from adaptation as defined by Grass (2006, 663). Whereas adaptation involves the phonetic, semantic, or cultural reshaping of the corresponding form in another version (*Solun*, *Meka*), derivational substitution responds primarily to the grammatical and syntactic requirements of the language of the version concerned, without substantively altering the toponym's phonological or semantic form. It designates a procedure whereby the reference form corresponds, in another version, to a form derived through morphological affixation, resulting in a change of grammatical category. Derivational substitution is closely related to transposition in

Vinay and Darbelnet's (1958) sense, but is retained here as a narrower, toponym-specific category for noun-to-adjective derivation under the morphosyntactic constraints of the language concerned. In the Slovene corpus, the noun phrase *la côte de Numidie* corresponds to the adjectival construction *numidijska obala*, references to Cyrenaica appear in the adjectival form *kirenajški*, and *la mer d'Hadria* is rendered as *hadrianska morja*. The procedure is not confined to Slovene: in Italian, *la mer d'Hadria* corresponds to the adjective *Adriatico*, and *de Naples* to *napoletani*. Athens- and France-related references likewise appear as the adjectives *atenski* and *francoski*, and *Thessalonique* as *solunski*, wherever the syntactic context requires adjectival agreement. Two degrees of constraint are involved. In multi-word geographical names of the pattern adjective + noun, the derived adjective is grammatically imposed: *hadrianska morja* follows the productive type of *Jadransko morje*, where a genitive noun would be ungrammatical as a name. In other contexts the adjectival form is the conventionally preferred variant: *numidijska obala* stands where the genitive construction *obala Numidije* would be grammatical but unidiomatic. The introduction of derivational substitution extends Grass's typological framework to morphosyntactic transformations that occur independently of cultural appropriation or phonological adaptation.

Language-specific distributions bring out distinct translational tendencies, revealed by each linguistic system's relationship to the Mediterranean toponymic heritage.

The French version shows a marked preference for retention (77.2%), reflecting the tendency to preserve historically established exonyms, particularly those with Latin antecedents. Adaptation (12.7%), transcription (5.7%), calque (3.2%), and transliteration (1.3%) account for the remainder, and derivational substitution was not observed. The Italian version exhibits a balanced profile between retention (41.1%) and adaptation (41.1%), with transcription (12.0%), calque (3.8%), and derivational substitution (1.9%) in secondary roles. The Slovene version displays the greatest procedural diversity: retention accounts for only 13.3%, adaptation through established endonyms for 22.2%, and the remaining strategies comprise transcription (24.1%), calque (18.4%), derivational substitution (17.1%), and transliteration (5.1%). This distribution indicates a tendency, in the Slovene version, to prioritise grammatical integration with internal linguistic norms over the replication of the forms found in the other versions.

EQUIVALENCE AND NARRATIVE FRAMING

Equivalence patterns across language pairs

According to Marianne Lederer (2003, 67), equivalence does not necessarily rely on structural replication but on conveying meaning through functionally appropriate forms in the target language. This observation applies particularly to place names, in line with Nida's (1964, 166) dynamic equivalence and Baker's (2006, 122–134) argument that translation involves repositioning that affects meaning construction. Table 4 presents the distribution of equivalence levels across language pairs for the 142 toponyms attested as noun forms in all three versions.

The data indicate graded variation in formal equivalence across language pairs. Mean graphemic similarity orders the pairs by linguistic proximity: French–Italian (70.7%), Italian–Slovene (66.9%), and French–Slovene (62.1%). The French–Italian proximity is concentrated in the high-equivalence band (32.4%) rather than in complete identity, because the two languages render shared Latin and

Table 2: Global distribution of translation strategies (N = 158).

Strategy	Percentage	N
Borrowing/Retention	29.1	46
Adaptation	28.5	45
Transcription	17.1	27
Calque	13.9	22
Derivational substitution	7.0	11
Transliteration	4.4	7

Table 3: Language-specific distribution of translation strategies (in %).

Strategy	French	Italian	Slovene
Retention	77.2 (122)	41.1 (65)	13.3 (21)
Adaptation	12.7 (20)	41.1 (65)	22.2 (35)
Transcription	5.7 (9)	12.0 (19)	24.1 (38)
Calque	3.2 (5)	3.8 (6)	18.4 (29)
Derivational substitution	—	1.9 (3)	17.1 (27)
Transliteration	1.3 (2)	—	5.1 (8)

Table 4: Formal equivalence of Mediterranean toponyms by language pair (N = 142, in %).

Measure	French–Italian	Italian–Slovene	French–Slovene
Complete equivalence (100%)	16.9	23.2	22.5
High equivalence (≥75% but <100%)	32.4	27.5	15.5
Combined high equivalence (≥75%)	49.3	50.7	38.0
Divergent forms (<75%)	50.7	49.3	62.0
Mean graphemic similarity	70.7	66.9	62.1

Hellenistic exonyms with systematically different endings: lighter differences remain within the high band (*Italie/Italia*, *Tunisie/Tunisia*, *Dalmatie/Dalmazia*), whilst heavier ones, as in *Carthage/Cartagine* (66.7%) or *Jérusalem/Gerusalemme* (63.6%), fall below the threshold. The pairs involving Slovene show the converse pattern: a larger share of complete identity (23.2% and 22.5%), produced by ancient names retained unchanged in all versions (*Adria*, *Salona*, *Thugga*, *Apsaros*), combined with substantial morphophonological adaptation. The French–Slovene pair exhibits the lowest combined high equivalence (38.0%) and the highest divergence (62.0%), reflecting the linguistic distance between the Romance and Slavic families. Whereas French prioritises the retention of established exonyms, Slovene generally adapts toponyms through morphophonological transformation and adjectival derivation, producing pairs such as *Venise/Benetke*, *Naples/Neapelj*, and *Thessalonique/Solun* that show minimal formal similarity despite identical referential function.

Analysis by toponym category reveals further distinctions. Ancient settlements (n = 19 in the equivalence dataset) reach combined high equivalence of 63% in French–Italian and 74% in Italian–Slovene comparisons, against 29% and 42% respectively for contemporary cities (n = 31). Forms such as *Carthage/Cartagine/Kartagina* maintain recognisable shapes grounded in Latin or Hellenistic traditions, a pattern consistent with shared classical heritage and scholarly conventions that stabilise historical toponymic forms. The French–Slovene pair inverts this hierarchy: contemporary cities reach 58% against 47% for ancient settlements, because both versions retain the modern endonyms of Adriatic and Mediterranean cities (*Dubrovnik*, *Split*, *Zadar*, *Toulon*), whereas Gallicised classical forms such as *Éphèse* and *Césarée* diverge from their Slovene counterparts *Efez* and *Cesarea*. Some historical names attract divergent treatments. The city of Ragusa illustrates the range: *Ragusa* in Italian reflects Venetian nomenclature; the French version uses both *Raguse* and *Dubrovnik* to distinguish the city's historical and contemporary identities; Slovene adapts the name morphosyntactically as the adjective *dubrovniški*.

Series such as *Naples/Napoli/Neapelj* and *Thessalonique/Salonicco/Solun* nevertheless indicate that contemporary city names remain open to phonological adaptation. *Venise* and *Benetke* exemplify functional equivalence despite formal divergence, maintaining identical reference through culturally adapted forms (Reiss, 2000, 72; Nord, 1997, 29). Similarly, *Monténégro* becomes *Črna Gora* in Slovene, a calque that maintains semantic equivalence. By contrast, formally similar toponyms such as *Jérusalem*, *Gerusalemme*, and *Jeruzalem* may evoke different associations depending on readers' cultural backgrounds, so that formal similarity does not guarantee equivalent cultural resonance.

Dynamic equivalence (Nida, 1964, 159–160) prioritises communicative effect over formal correspondence. French *la côte de Numidie* corresponds to *numidijska obala* in Slovene through adjectival transformation, whilst Italian *spiagge africane* replaces the specific toponym with a generalised description. These variations show how morphosyntactic restructuring and lexical substitution maintain discursive coherence through different means. Toponymic equivalence thus operates as a graduated system, with each language pair employing strategies appropriate to its linguistic and cultural context.

Narrative framing in toponymic translation

Baker (2006, 105–106) posits that translators actively contribute to the elaboration of narratives through their choices, and she identifies four framing strategies: temporal and spatial framing, selective appropriation, framing by labelling, and repositioning (Baker, 2006, 112–132). Temporal and spatial framing, which operates through paratextual embedding rather than textual modification, is acknowledged but lies beyond the present enquiry, which concentrates on the remaining three mechanisms.

She defines framing by labelling as "any discursive process that involves using a lexical item, term or phrase to identify a person, place, group, event or any other key element in a narrative" (Baker, 2006, 122), and observes that such a label supplies an interpretive frame that both guides and limits the reader's response. The treatment of the city of Thessaloniki illustrates this mechanism. The French version employs *Thessalonique*, the Italian *Salonicco*, and the Slovene *Solun*: French aligns with contemporary Hellenised usage, Italian keeps the standard Italian form, and the Slovene *Solun*, a form of the Slavic tradition, can be associated with Balkan and Orthodox cultural memory.

The Dalmatian toponyms *Dubrovnik/Ragusa* and *Kotor/Cattaro* reveal further divergence. The Slovene text employs the endonyms exclusively: *Dubrovniška republika*, *dubrovniške kapitane*, *nad Dubrovnikom in Kotorjem*. The Italian version provides double designations: *Dubrovnik (Ragusa) e Kotor (Cattaro)*, *fortezze di Ragusa (Dubrovnik)*. The French distributes the forms contextually: *Dubrovnik* for geography (*les escarpements qui dominent Dubrovnik*), *Raguse* and *ragusaine* for historical references (*la petite république ragusaine*, *les capitaines de Raguse*). Italian exonyms such as *Cattaro* are consistent with the naming conventions of the Venetian and Italian presence in Dalmatia.

Baker (2006, 114) further describes selective appropriation as realised in patterns of omission and addition that suppress, accentuate, or elaborate particular aspects of a narrative. The etymological discussion of a Punic term illustrates this through differential attribution. The French provides an explicit scholarly reference, "D'après Quintilien, il venait du punique", whereas the Italian and Slovene present the Punic origin without attribution: "viene forse dalla lingua punica" and "morda je prišla iz punskega jezika". The French addition appears to situate the text within classical learning. Such a difference counts here as a feature of the published version, whether it originates in a translator's decision or in the author's revision of a given edition. The Pytheas episode, by contrast, shows elaboration running the other way: the French states that the navigator "longea la Grande-Bretagne et l'Irlande", whilst the Italian and Slovene versions follow the episode with a passage, absent from the French, on ancient mariners carried by the trade winds to the islands now called the Canaries, the Hesperides of old, and on the Azores as the islands of return, thereby extending the Mediterranean's conceptual boundary westward.

Finally, Baker defines repositioning as realignment "through the linguistic management of time, space, deixis, dialect, register, use of epithets, and various means of self- and other identification" (Baker, 2006, 132). The passage describing Venetian censorship of mapping in relation to competing powers reveals register variation across the versions. The French employs a neutral concessive construction: "Venise fit de même … malgré Gênes et Byzance, les califes arabes et le sultan turc". The Italian substitutes the colloquial idiom *alla faccia di*, and hedges the assertion with *cercò di farlo* ("attempted to do so"): "Venezia cercò di farlo … alla faccia di Genova e Bisanzio, dei califfi arabi e del sultano turco". The colloquialism introduces a shift in tone that repositions Venice's relationship to the other Mediterranean powers with marked emphasis. Although the shift concerns register rather than the form of a place name, it bears on toponymic framing because the names Genoa, Byzantium, and Venice can be read within the evaluative frame the register sets up: the same powers are presented neutrally in one version and polemically in another. The Slovene aligns with the French register, employing the neutral concessive preposition *navkljub*: "navkljub Genovi in Bizancu, arabskim kalifom in turškemu sultanu". The French–Slovene alignment, contrasting with the Italian colloquialism, is consistent with target-language or edition-specific conventions, although the parallel-text design does not permit the source of the variation to be determined.

Applied to the corpus, Baker's framework shows that toponyms operate as narrative elements open to framing. Framing by labelling may activate distinct associations: *Solun* can thus be read as evoking Orthodox contexts, whereas *Cattaro* reflects Italian Dalmatian naming conventions. Because reader response is not tested here, such effects are stated only as interpretive possibilities. Selective appropriation also modulates geographical scope and scholarly attribution, and repositioning through register (*alla faccia di* versus *malgré/navkljub*) appears to encode evaluative stances. These patterns suggest that toponymic choices may contribute to shaping differentiated spatial representations across the published versions.

CONCLUSION

This study has examined toponymic translation in the French, Italian, and Slovene editions of Predrag Matvejević's *Mediterranean Breviary*, showing that place names operate as cultural markers that participate in the construction of distinct Mediterranean representations. The analysis addresses the questions posed in the introduction concerning cross-linguistic variation in translation strategies, the role of historical factors, and the contribution of toponymic choices to narrative construction.

The quantitative analysis establishes a graded hierarchy of equivalence reflecting linguistic proximity and historical contact. Mean graphemic similarity decreases from French–Italian (70.7%) through Italian–Slovene (66.9%) to French–Slovene (62.1%), and the French–Slovene pair shows the highest proportion of divergent forms (62.0%), consistent with the

distance between the Romance and Slavic language families. The French–Italian affinity operates through near-identical forms, an effect of shared Latin heritage filtered through each language's ending conventions. These patterns indicate that toponymic equivalence operates through culturally specific strategies rather than through formal correspondence alone, with each language version developing a distinct relationship with Mediterranean space.

Two contributions emerge from the analysis. First, the introduction of derivational substitution as a sixth translation strategy extends Grass's (2006) framework to the noun-to-adjective correspondences observed in the present corpus, particularly in the Slovene version. Closely related to transposition (Vinay & Darbelnet, 1958), derivational substitution is retained as a narrower category, specific to one class of toponyms, and its recognition makes grammatical mediation visible as a distinct translation process in the study of proper names. Second, the integration of Baker's (2006) framing concepts with toponymic analysis suggests how translation choices may contribute to cultural positioning: the published versions exhibit framing by labelling (*Thessalonique* versus *Salonicco* versus *Solun*; the contextual distribution of *Raguse* and *Dubrovnik* in French; the Italian double designations *Dubrovnik (Ragusa)* and *Kotor (Cattaro)*), selective appropriation, and repositioning through register (*alla faccia di* versus *malgré*) to construct target-specific Mediterranean narratives.

The scope of these findings is defined by the corpus: the analysis covers the *Maps* section of *Mediterranean Breviary*, not the *Breviary* or *Glossary* sections, and concerns three European languages that share, to varying degrees, historical connections with Mediterranean civilisation. Within these limits, the three versions do not translate one geography, but produce three. The sentence recording Pseudo-Scylax's voyage sends the French reader across *la mer d'Hadria*, the Italian reader across the Adriatic, and the Slovene reader across *hadrianska morja*: one itinerary, rendered as three distinct Mediterranean spaces.

SREDOZEMSKI TOPONIMI V PREVAJANJU

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POVZETEK

Članek obravnava prevajanje toponimov v francoski, italijanski in slovenski izdaji dela Predraga Matvejevića Mediterranean Breviary, in sicer v razdelku Zemljevidi (Cartes, Carte, Karte), na korpusu 158 toponimov. Pri tem odgovarja na tri vprašanja: kako se prevajalske strategije razlikujejo med jezikovnimi različicami, kako vzorci ekvivalence odražajo jezikovno bližino in zgodovinske dejavnike ter kako izbire toponimov prispevajo h konstruiranju narativne strukture. Metodologija združuje tri pristope. Tipološka klasifikacija sledi okviru Thierryja Grassa (2006), ki razlikuje med prevzemom, adaptacijo, transkripcijo, kalkom in transliteracijo. Kvantitativna analiza meri formalno ekvivalenco z indeksom grafemske podobnosti. Kvalitativna analiza uporablja koncept okvirjanja, kot ga opredeljuje Mona Baker (2006), zlasti selektivno prisvajanje (selective appropriation) in okvirjanje z označevanjem (framing by labelling). V prispevku je kot šesta prevajalska strategija predlagana izpeljavna substitucija, s katero se pojasnijo oblikoslovno-skladenjske spremembe, ugotovljene v slovenskem prevodu, kjer se samostalniške oblike zaradi slovničnih omejitev lahko prevajajo v pridevniške oblike. Ta kategorija razširja Grassovo tipologijo na samostalniško-pridevniške ustreznice, opažene v obravnavanem korpusu. Rezultati kažejo na razlike med jezikovnimi pari. Povprečna grafemska podobnost je najvišja pri francosko–italijanskih parih, srednja pri italijansko–slovenskih parih in najnižja pri francosko–slovenskih parih, ki kažejo tudi največji delež razhajajočih se oblik, kar odraža jezikovno oddaljenost med romanskimi in slovanskimi jeziki.

Ključne besede: prevajanje toponimov, narativni pristop, ekvivalenca, izpeljavna substitucija, sredozemski prostor

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THE IDEOLOGY OF TECHNOLOGY AND ITS DEVELOPMENT MEETS THE POLYCRISIS OF MODERN CAPITALISM

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ABSTRACT

The article analyses the ideology of technology and its development as a constitutive ideological structure of contemporary capitalism and as an obstacle for developing sustainable, emancipatory, democratic solutions for the polycrisis that has began to radically destabilise the existing ecologically unsustainable system. By utilising a materialist neo-Luddite analytical framework it examines the central ideological notions through which technologies and their development were historically imagined. Additionally, it reflects on this ideological structure in connection to the wider justification and legitimisation of capitalism in its various historical iterations and points to the limiting nature of this structure that obstructs the articulation of alternative visions.

Keywords: ideology, technology, technological development, capitalism, polycrisis, industrial revolution, computational thinking

L'IDEOLOGIA DELLA TECNOLOGIA E DEL SUO SVILUPPO INCONTRA LA POLICRISI DEL CAPITALISMO MODERNO

SINTESI

L'articolo analizza l'ideologia della tecnologia e del suo sviluppo come struttura ideologica costitutiva del capitalismo contemporaneo e come ostacolo allo sviluppo di soluzioni sostenibili, emancipatorie e democratiche per la policrisi che ha iniziato a destabilizzare radicalmente l'attuale ordine capitalistico ecologicamente insostenibile. Utilizzando un quadro analitico neoluddista materialista, esamina le nozioni ideologiche centrali attraverso le quali le tecnologie e il loro sviluppo sono stati storicamente immaginati. Inoltre, riflette su questa struttura ideologica in relazione alle più ampie giustificazioni e legittimazioni del capitalismo nelle sue diverse iterazioni storiche e sottolinea la natura limitante di tale struttura, che ostacola l'articolazione di visioni alternative.

Parole chiave: ideologia, tecnologia, sviluppo tecnologico, capitalismo, policrisi, rivoluzione industriale, pensiero computazionale

INTRODUCTION

The article takes a critical look at a fundamental building block of the key ideological structures underlying society: the ideology of (capitalist) technologies and their development. We argue this ideological structure underpins the modern capitalist (neo)imperial order on both global and local levels. Along with other ideological structures (e.g., free market, private ownership of the means of production, citizenship, nation/nationalism), this ideology is crucial for (re)producing central socio-political and economic (class) relations, relations of power, stratifications, exploitation and domination that ossify existing unequal relationships among classes, genders, ethnicities/races etc., naturalise and objectify them, while giving legitimacy to the capitalist system generally and its various temporal variations (cf. Balibar & Wallerstein, 1991; Mau, 2022). The ideological structure is shown to be essential for the complex exercise of power in capitalism today, where unprecedented local and global destabilisations have led to a polycrisis (cf. Tooze, 2022). The intensification of several mutually reinforcing crises is responsible for a unique challenge to the conditions on which the capitalist order relies. Such crises include the ongoing political crises, epistemological/ideological crises of meaning, identity, belonging, and moral crises to do with wars and genocide (Palestine), economic stagnation, and the crisis of society with rising inequality and living costs and precarious employment, stronger geopolitical competition tied to destabilisation of the USA's global hegemony, and the dynamic, unpredictable and violent interregnum. Above all, there is the ever worse climate and wider ecological crisis, which has begun to severely affect living conditions not just in the Majority world (Alam, 2008) (which has been disproportionally affected), but also in the West. The described polycrisis is inextricably linked to the inherent contradictions of the current global capitalist and neo-imperialist system. This system rests on: past colonial hierarchies; private ownership of the means of production, which determines its hierarchical class structure; wage labour; unpaid gendered reproductive labour; competitive markets as the primary mechanism for allocating resources; and the nation-state form of socio-political organisation (Harris, 2023). It also relies on: an exploitative, destructive, resource- and energy-intensive, unsustainable discriminatory developmental model; structures, institutions and practices aimed chiefly at continuous and expansive economic growth and/or the accumulation of capital and the profits of capitalists and corporations; and the ever-growing scope of the commodification of life and consumption of goods produced solely for the market (primacy of exchange vs. use value) (Patel & Moore, 2017). Political, societal, economic and ecological crises are fundamental to the system, which places private capitalist interests above the public interest, especially when it could endanger the former interests. Until recently, the system was highly responsive to various crises, but has never resolved the central ecological contradictions; namely, the need for greater exploitation of natural resources and pollution, which is starting to undermine the conditions the system needs to exist given that the planet's resources and carrying capacity and ecological adaptability are finite (Wainwright & Mann, 2018).

A proper response to the polycrisis calls for a fundamental rethinking and reorganisation of the mentioned order. We argue that to develop alternative democratic, sustainable and emancipatory visions of a reorganised system, we must first develop an appropriate critique of its underlying structures, and the root causes of the existing order's instability and unsustainability which structure the way we think and act. This makes it necessary to first address the blind spots in today's critiques. Although (capitalist) technology(is) and their development have always played a central role in the capitalist order, its transformations and visions of the future and, together with the ideological structure underlying it and capitalism generally, continues to be under-examined and on the fringes of critical thinking and analysis (Winner, 1977). In the present context, this is particularly dangerous given the radical ways in which the order has become destabilised as well as the dubious, undemocratic, authoritarian, power-centralising, dispossessing, and technology-centred non-solutions promoted and implemented by capitalist elites. The latter notably refer to the most prominent and powerful parts involved: Silicon Valley (USA) based/adjacent Big Tech elites, the "techno-oligarchs" (cf. Vrečko Ilc, 2025).

The overarching analytical framework guiding the article builds on the notion that the technology-centred ideological structure is central for capitalism, and at its foundations. And that this is inextricably tied to the centrality of the relationship between capitalism and technologies and their development (Costello, 2024; Winner, 1977). The foundations of this multidimensional relationship are best understood when we see it as tightly connected with the ways power functions in a capitalist system. Namely, how capitalist elites and the system generally re-produce themselves and the associated hierarchical exploitative relationships, how the imperatives and logic of the system organise and direct human activities and relationships, institutions and structures, and the manner in which resistance to it

is handled. Our analytical framework combines materialist and neo-Luddite insights concerning power and technology in capitalism. Building on Søren Mau's (2022) reinterpretation of Marx's understanding of power, we frame the ideological dimension of power in a materialist way such that the dimension is constitutively co-determined and co-enabled by the other two core dimensions of power: economic and repressive. The ideological dimension refers to epistemological frameworks (discourses) for perceiving, imagining, thinking about, and responding to the socio-political reality, which they in turn co-create. These frameworks include specific values and presuppositions, or *Truths*, regarding our place and role in society and the world, relationships among individuals, and groups. They also encompass rationalisations and legitimisations of multiple and multidimensional inequalities, hierarchical, exploitative, extractive relationships, and structures, thereby co-enabling reproduction of the capitalist system. In addition, they refer to specific historical narratives or fantasises that seek to give legitimacy to the status quo, which mystify historical transformations and obfuscate and silence certain struggles in history and resistance to capitalism today. They ultimately present the history of capitalism not as one of class struggle, colonial genocide, occupation and domination, or dynamic and non-linear, but as a steady and linear progression creating ever more wealth, freedom and opportunities. The ideological dimension is made up of several layers in that while some ideological frameworks are foundational and constitutive, others can appear and disappear in line with historically specific capitalist interests and struggles, changes in accumulation processes, and changes in geopolitical and geoeconomic relationships and hierarchies. The ideological structures behind all of this are not static and have instead developed along with the capitalist system's transformations and been influenced and thus influenced ideologies during particular periods in history. The ideological structures include an expansive discursive archive populated by a multitude of notions, suppositions, narratives, values and norms, categorisations and hierarchisations, legitimisations and rationalisations, normalisations and naturalisations. Moreover, these structures are continuously reproduced via a complex apparatus of various institutions and practices, different subjects in all spheres of society, ranging from political institutions, elites, intellectual, educational and scientific institutions to various media institutions through to corporate actors via their marketing and PR activities. The primary target of the ideological dimension of power is the minds of individuals and groups (Althusser, 2000; Foucault, 2001; Freeden, 1998; cf. Mau, 2022).

Even though we focus analytically on the ideological dimension of power in this article, this is done with the understanding that ideas and notions by themselves are devoid of power if they are not tied to the two other dimensions of power. First: the economic dimension, which refers to 'mute compulsion' in a capitalist system that forces those subjected to it to participate in the productive and reproductive processes, to work, not through force and ideology but by structuring the conditions of living in general. Second: the repressive dimension, which refers to state and corporate policies, institutions, techniques, and practices chiefly based on the repression and disciplining (control, surveillance, correction) of individuals and groups, and the threat of punishment when certain rules and behaviours are not followed properly (cf. Mau, 2022).

The neo-Luddite (e.g., Merchant, 2023; Mueller, 2021; Sadowski, 2025) perspective in turn enables us to understand technology and its development as never-neutral since they are determined by specific choices and interests of capitalists, and as inherently political concerning the direction of their development, their main characteristics, the way they are implemented and utilised, who owns and controls them, and to what ends, and how they affect particular groups of people, how they empower/disempower, and who exploits, surveils and controls them. Further, the Neo-Luddites provide us with the initial understanding that technology's societal benefits were never given but were mostly the result of public regulation of it fought for by various worker and other social movements. The perspective also brings awareness of the fact that the authoritarian capitalist nature of technological development, which excludes democratic interventions, deliberation, and decision-making, has not changed over history while alternative ways of developing are obfuscated and/or directly denounced for being irrational, impossible and counterproductive.

To comprehensively interrogate the underlying ideological structure, we first examine the centrality of the capitalism–technology relationship, how it relates to both the polycrisis and the dominant ways used to respond to it. This is followed by an examination of the main characteristics of the ideological structure of the relationship. Here, focus is given to several crucial historical and geopolitical contexts tied to the major transformations that led to the contemporary capitalist system and ensured the establishing of the essential building blocks for its structure. We commence with analysis of certain notions developed during the genesis of the modern order, modern state, colonialism, and the capitalist mode of production, concentrating on pioneering political, social and scientific thought. The article

then interrogates the ideas and notions which legitimised and rationalised the Industrial Revolution and the rise of automation technologies and modern computational thinking. It is within these contexts that we expect to identify and reflect on ideological notions that are key coordinates of the underlying ideological framework. We conclude by briefly reflecting on the insights gained and the implications they hold.

TECHNOLOGICAL DEVELOPMENT, CAPITALISM, AND THE POLYCRISIS

Capitalism, technological development, and technologies are inextricably linked. The latter have been a product of capitalism's logic and imperatives of expanding accumulation and competition among capitalists, which forced them into continuous innovation. Still, the ongoing enhancing of the system's capabilities enabled it to transcend its European context and become truly global. Even more importantly for the history and future of humans, the system became planet-altering, radically transforming our relationship with nature and to other living beings that were rendered epistemologically/ideologically and ontologically totally subservient to the processes of both capital accumulation and human domination (Harris, 2023; Malm, 2016; Winner, 1977). Here, the factory system had a large role in transforming the nascent capitalist order into an industrial system. This role began in the early 19th century when automation machinery, surveillance, control and domination of workers combined with the utilisation of novel energy (primarily fossil fuel) sources permitted unprecedented levels of production and of resources (extending from ore to food and labour), unmatched expansive logistical/transportation networks (roads, railroads, ports), stable and fast communication, and consequently the radical altering of natural and human-built environments via extraction, destruction and pollution. Subsequent transformations of this system were especially linked to the development and implementation of central capitalist technologies (such as the internal combustion engine, logistics-shipping container, novel ICTs including radio, television and computer-digital technologies), which were used to establish new accumulation regimes whenever the old ones were stagnating, fading, and starting to collapse under the weight of their contradictions. Each transformation contributed to the massive expansion of the production of commodities (goods and services) as well as their variety and quantity, to the massive growth of consumption and the increasingly complex (global) value chains further integrating global societies in an ever wider and deeper world system. This was crucial for reproducing the legitimacy of the system since ordinary people could observe and (at least partly) participate in the continuous material progress by consuming an expanding range of novel commodities, which became conflated with improved well-being (Merchant, 2023; Patel & Moore, 2017). However, no transformation could resolve the constitutive contradictions of the capitalist system. The (eco)modernist hope that social, political, economic and ecological issues and crises could be resolved via a (technologically) improved accumulation regime has proven to be illusionary in the 21st century when all of these crises have intensified and created a polycrisis of the system, which precipitated the implementing of various quasi-solutions (more concentration and consolidation of markets, more commodification, more resource extraction, fewer worker rights), and have made the system more unstable, unequal, exploitative and authoritarian (Dunlap, 2024).

The solutions proposed are determined by the naive faith that continues to be present among the general public, political elites, and researchers/academics in strategies and policies in the inherent societal benefits of capitalist technological development and the corporate ownership/control and the neutral nature of technologies and the CEO/founders of Big-Tech corporations as inherent geniuses and conduits of these "transcendent" process that are to jointly solve all major dimensions of the polycrisis, including inventing and implementing 'magic' technologies (e.g., generative 'AI') to resolve the climate and wider ecological crisis, economic stagnation, poverty, hunger, and the issue of natural resources being finite coupled with the issues concerning our deteriorating liberal democracies (Sadowski, 2025). Such beliefs remain largely in place (Vrečko Ilc, 2025) despite successive hypes as to the capabilities of novel technologies (from social media to WEB 3.0, the crypto-hype, the Metaverse, autonomous vehicles, to automation) leading to resource and wealth destruction. Despite the extensively documented negative effects of technologies like their detrimental effects on democratic politics, science and education, work and leisure, the problematic behaviour of Big-Tech in the area of monopolistic anti-competitive practices, the breaching of citizen and consumer rights, the massive ICT-enabled surveillance and intrusive tailored advertising, deteriorating services (e.g., Google search), and the appalling behaviour and political ideas of techno-billionaires (e.g., Musk, Zuckerberg, Bezos, Gates, Thiel, Elison, Altman, Andreesen) striving for a dystopian techno-authoritarian/fascist, racist, sexist, eugenic, hierarchical, environment-destroying vision of society that would erase all the gains of

previous progressive and emancipatory struggles and place us on an even more unsustainable trajectory, and the capitalist states' utilisation of novel privately developed surveillance and automation technologies to stifle dissent and resistance to the increasingly unpopular status quo. It appears that no past broken promise, no horrible effect, no fascistic behaviour of the techno-oligarchs, or any authoritarian state intervention can destabilise these beliefs. The biggest reason for this is the multidimensional constitutive relationship between technologies, their development and the capitalist system, which is substantially older than the present permutation whereby the 'tech sector' enjoys a dominant position among capitalist industries due to its penetration and influence on all other pivotal industries (fossil fuels, transportation, heavy industries, finance etc.). Also relevant here are the underlying Teflon-like ideological structures which rationalise/legitimise and naturalise/normalise capitalist technologies and their development and play a substantial part in the reproduction of these power relations which hinder the expression of alternative solutions.

To unpack the mentioned ideological structure, we first analyse its key building blocks, notions, ideas, suppositions, subjects-objects as can be identified in pioneering modern socio-political and scientific thinking thought.

MODERN SOCIO-POLITICAL THOUGHT AND THE MAJOR BUILDING BLOCKS OF THE IDEOLOGICAL STRUCTURE

The key building blocks of the ideological structure can be discerned in socio-political and scientific thought expressed between the 17th to 19th centuries. It is crucial to demonstrate the obfuscated origins of certain still dominant notions and predispositions concerning technology and its development and to show how such thinking constitutes the rationalising and legitimising of the capitalist social form in the context of its genesis, transformations and consolidation. In this regard, we focus on the crucial revolutionary notions of modern thought related to material progress, the unclear divine–secular separation, the collective and individual privileged subject of development, the centrality of the capitalist property regime, and the notion of productivity as a building block for the nascent ideological structure.

The genesis of capitalism is ideologically characterised by a radical break from yet at the same time an obfuscated continuity of certain notions to do with the previous feudal order and its ideological legitimisation and justification. Fundamental works of modern political theory like Hobbes' *Leviathan* (1998) and Locke's *Two treaties on government* (2003) were simultaneously ideological visions of the gradually establishing Bourgeois-capitalist elites of the proper way for organising societies and reflections of transformations already made by then. A major part of this undertaking still nascent in Hobbes (1998, 19, 222) and fully formed in Locke (2003, 111–121) was the establishing of the material progress of society as fundamental and imperative for humans-as-a-species. Thinkers together with elites gradually established material progress, in the form of the expansion of material production, as a human duty, as what separates us from other living beings. A feature of this thinking was the notion of the technological domination and subjugation of nature (cf. Winner, 1977).[1] The subjugation and exploitation of other living beings and natural resources was seen as fundamental for the continued expansion of the material wealth of a society, thereby also creating a fundamental epistemological and ontological separation between humans and the natural world (Wainwright & Mann, 2018). Ideologically, the material progress and wealth of a society was directly tied to (the notion of) technological development and established as a direct expression of the moral character of a society and/or individuals.

In this context, a specific Christian eschatology was secularised and integrated into the notion of progress and (technological) development. This led to the development of technology being perceived as fundamental to the salvation of humanity*:* salvation in the form of a return to a perfect state of being, of harmony before the expulsion from the garden of Eden. It was imagined as a correction of Adam and Eve's transgression of eating from the tree of the knowledge of good and evil (Noble, 1999). In an ideological sense, technological innovations were connected with the secularised Christian idea of salvation that would make us immortal in the future. The secularised idea of immortality fundamentally influenced most Enlightenment thinkers, including Francis Bacon the father of modern empiricism. It is on this basis that *t*echnological development became equated with moral development. It became possible to delegitimise any kind of critique of technological development and any kind of regulatory obstacle placed in its path as morally suspect and/or an immoral obstacle to attaining human salvation (Geraci, 2008; Noble, 1999). Specific articulations of this ideological framework claim

1 The idea of nature held different roles in modern political thought not simply as something to be dominated but also as a determinant, explanans, origin and a (natural) state to be transcendent, cf. Pikalo & Lukšič (2013).

that technological development leads not only to our salvation in the sense of immortality (e.g., computer/A.I. fantasies of the digitalisation of our minds) but also to the creation of a technological God. The latter is a close approximation of the God in the Old Testament in that it will either absolve us from our sins or enact divine retribution. This legitimises extremely problematic policies and activities and the centralisation of power of those who are established or establish themselves as "prophets" of this technological God (Sadowski, 2025). The above ideas formed a fundamental element of a wider set of secular "Promethean" ideas, later established and perpetuated as part of the capitalist ideology, of thinking on and imagining technology(ies) (Merchant, 2023).

The genesis of modern theological and secular notions of technological prophets and Promethei can only be understood in a relationship of mutual support and influence with the capitalist-imperialist notions of universal and uni-linear objective development of human societies and the collective and individual agents of change, enlightenment, progress and evolution. The development of human societies was and is imagined as progressing via universal stages that follow specific inescapable "natural" laws (Lindqvist, 1996). European/Western societies were/remain (self-)imagined as naturally superior to all other societies based on their technological development and superiority. Depending on the historical and geopolitical and socio-political context, this superiority was also established via the notion of the biological superiority of European/Western populations in the sense of presumably possessing the most developed minds (intellect, reason) and bodies of any human group. Hence, Europeans/Westerners were established as holding a legitimate right to empires, to colonies, to intervention, as well as the capitalist-imperial appropriation and exploitation of societies deemed to be unenlightened and at a lower stages of development. The latter were imagined as in need of being led by the "enlightened" superior Europeans/Westerners (Lindqvist, 1996).

At the end of 19th century, capitalist Western elites added to these notions social Darwinism and eugenics (theories and practices of "racial hygiene"). Built upon the biopolitical notions of normality and possibility of the scientific identification and optimisation of developmental processes, these theories were based on the notion of the strict classification and hierarchising of individuals, groups and populations into distinctive 'natural' categories. These gave the basis for the specific regulation of populations and the disciplining (and exclusion) of individuals according to norms and the 'normality' of behaviour (e.g., social roles that certain categories of people could play in society) and appearance ('normal' bodies) corresponding to specific categories. A crucial component of these theories of normality and abnormality and hierarchical categorisations were the notions of the hereditary nature of these 'identified' characteristics/differences, and the notions tied to the inherently dangerous abnormality that would, if left unregulated, produce grave, degenerative effects for normal, superior populations and individuals (McWhorter, 2009).

These ideological frameworks simultaneously built on and naturalised sexist/gendered, racist/racial hierarchies and class hierarchies that had been established following the genesis of the capitalist social form in the early modern English context (Hall, 1995). The biggest difference was that they led to the novel authority of medical-biological-anatomical-anthropological-social sciences and that due to the European/Western imperial expansion these hierarchies and their novel biopolitical forms in particular were spread globally. However, the individual and population norm of the capitalist system remained only slightly changed to accommodate the novel scientific theories and local specifics concerning existing hierarchies. The Hobbesian and Lockean modern normal and normative political and economic subject thus remained in place. It continued to reflect the bourgeois man that is imagined to be autonomous, rational, intelligent, mentally, and physically fit (namely, Christian and white), and deemed to be cultured and civilised (McWhorter, 2009). Members of this category have established themselves and constantly re-established themselves as those who are inherently and naturally called upon to rule, lead, judge, subjugate, discipline and exclude those beneath them, and to be respected by all, and are not be subject to criticism. This individual norm has served and still serves to legitimate and rationalise the most brutal colonial-imperial and capitalist practices at home in the metropoles and abroad in (neo)colonial contexts.

An important feature of this norm is that members of this category/norm were and are imagined as productive, which is directly linked to their ownership of the means of production, ownership of private property in the form of land, and even more crucially the ownership of technology(ies). The capitalist system is characterised by a historically singular understanding of private property. The latter is imagined as capital in the sense it is inextricably linked to the notions of exclusivity and improvement. The property of land was imagined as tied to the intentional process of increasing its productivity with the sole purpose of improving its profitability (cf. Locke, 2003). This notion was fundamental to

the ideological legitimation of colonial occupation and dispossession of the land of native populations and for privatising (e.g., enclosure of) the commons and the land of local farmers-tenants in the colonial metropoles. A legitimate and legal basis of ownership could now be established only based on productive labour, which leads to the realisation of profit (Armitage, 2004). Nonetheless, the term producer became exclusively tied to the individual who actively utilises their private property for profitable investment: the capitalist, the entrepreneur, the captain of industry, and the hero of capitalist social form. The actual producers, the employed labourers, and the undeniable fact of the always-already collective dimension of production were erased from the notion of producers (Wood, 2017). A similar logic was established regarding technological innovations and the ownership of technology(ies) under capitalism. The notion of exclusivity held a core role in establishing intellectual property over specific technology(ies) as exclusively tied to a particular individual (and later corporation). The fact this property right was/is recognised and enforced by the state enables those holding this right to not merely improve their own production process but to control its use by other capitalists and generate an income in the form of a rent paid by users of this technology that employ it to improve the production process and make higher profits. In this ideological framework, the innovator-inventor plays the part of the lonely hero (cf. Merchant, 2023).

The latter is always-already limited to individuals, who are able *to* legally privatise the invention of a novel technology. This obfuscates the inherent collective nature of any type of innovation, which is always a product of numerous people, their mutual relationships and influences, their multiple experiments, multiple mistakes, and dead-ends that were necessary for a given invention-innovation to emerge. Regardless of the individual genius of specific inventors, their innovation is always the result of unrecognised and unseen collective labour, structures, institutions, and relations (Johnson, 2010). In any case, this individualisation and exclusivity of ownership is heavily determined by the membership (proximity) of the individual-inventor to the norm-subject of the capitalist order. Ownership of technology(ies) was/is disproportionately attributed to those closer to the norm, yet is denied to members of hierarchically inferior categories (e.g., women, of non-European descent, common workers). While the former bathe in glory and wealth, the latter's contributions are largely obfuscated and erased. Ultimately, this ideological framework enables capitalists (individuals and corporations) to gain exclusive ownership of the technological innovations made by their workers. This process is similar to the usual process of extracting the surplus value from the work of labourers and in a capitalist order is also perceived to be completely legal and legitimate (cf. Sadowski, 2025).

The extent of material compensation and symbolic recognition for technological innovations that workers can receive was hierarchically structured and dependent on the capitalist ideological framework of 'natural' hierarchies among members of specific population categories and the hierarchies tied to the capitalist division of labour. Even though male engineers and management could be compensated and partly celebrated, the contribution made by ordinary male and female workers and most female engineers was/is silenced, and thus they are not compensated for their efforts. This should be understood as an important element of consolidating control over workers through their differentiation, hierarchisation, privileging and discrimination. Economic compensation and (limited) symbolic recognition of engineers/experts was/is an ideological instrument to subvert, to prevent their solidarity with ordinary workers, to prevent their mutual resistance to exploitative capitalist social relations, and as an instrument for establishing solidarity with capitalists, and for aligning their interests and values not with other workers but with their employers, thereby also valorising and reifying the subject-norm of the capitalist order (cf. Harris, 2023).

A closer look at today's richest and most influential people (e.g., Gates, Bezos, Zuckerberg, Musk, Thiel, Altman) – the owners and leaders of crucial technological mega corporations – shows that this norm largely remains intact in our modern globalised digital era. It also demonstrates the above-mentioned abstract structure in a concrete way since each of them has extremely successfully privatised an enormous set of innovations of other people and acquired global recognition for innovations they made no tangible contribution to with their own intellectual/engineering work. Further, their common traits and (self)representation, ranging from an affluent family background, attending Ivy League universities, being located in Silicon Valley, the heartland of the American empire and birthplace of American technological might, their very similar values and interests (profit above all else, commercially minded, hyper-egoistical mindset) makes them interesting not as individuals but as avatars and expressions of a certain dominant ideological-material order and the specific capitalism–technology relationship. This has allowed them to succeed and acquire unprecedented influence also due to the specific ideological structure from which they can still draw on in order to legitimate and rationalise their influence and attack and delegitimise any regulation that would seek to

reduce their power. Similarly to the earlier capitalists, they are (self)represented as being at once individual geniuses, brilliant engineers and inventors, as self-made men, entrepreneurs, who succeeded because of their capabilities, who should direct the masses and lead people and societies, whose genetic material is outstanding and superior, who are the primary conduits/messiahs of the transhistorical/godly forces of technological progress and at the same time and paradoxically extremely rational and all-knowing despite holding dubious esoteric and narcissistic beliefs in a utopian future that closer inspection reveals to be a techno-dystopia for the vast majority of humanity.

As shown in the following chapter, imagining technology(ies) as the primary solutions for crucial socio-economic and political issues is as old as industrial capitalism, as are the notions that technological progress will ultimately benefit the wellbeing of societies and eventually lead to a technologically enabled utopia. Yet, the industrial revolution was also the genesis of other central elements of the ideological structure, including the still very effective ideological tools used to combat any resistance against the introduction of novel technologies.

THE INDUSTRIAL REVOLUTION AND CONSOLIDATION OF THE IDEOLOGICAL STRUCTURE

The ideological legitimisation and rationalisation of the British industrial revolution in the early 19th century may be viewed as the critical historical context when several central coordinates of the underlying ideological structure were established. It was then that the capitalist drive towards innovating productive processes encountered serious opposition from those negatively affected by it. Hence, major ideas about technologies and their development were articulated, popularised and naturalised to simultaneously legitimise and rationalise technological innovation, and to silence/obfuscate ideological-material resistance to these processes as well as to delegitimise and pathologise critiques by individuals and social/worker movements. These ideas are today completely naturalised and normalised (Merchant, 2023; Mueller, 2021).

One of the central notions is techno optimist and techno determinist, which has framed technological progress and the implementation of novel technologies as inevitable (a force of its own), an inherent good that should not be questioned with respect to its immediate negative impacts on workers and/or normal citizens, or its negative short-mezzo-long-term impact on the environment, negative impact on social relations, institutions and structures, including democratic political rights and processes, and the further precarisation of workers, ossified divisions of labour, and concentration of wealth and power. The discourses that legitimised the genesis of industrial capitalism (implementation of the factory system and automation technologies powered by the steam engine and later the internal combustion engine, and electricity) were suffused with the already addressed notions of material progress, especially the ideas of Adam Smith. These became the ruling political dogma of economic and political elites. Smith's ideas became crucial in factory owners' legitimisation of and the elite's and state's support for the unregulated implementation of the factory system and the machinery for the mass automation of work that undergirds it (Merchant, 2023). In particular, Smith's ideas about the "free market" (e.g., the necessity of pro-trade, pro-entrepreneur, anti-regulation policies) as the fuel that drives the motor of economic (and societal) prosperity and his ideas of the division of labour as the motor for generating prosperity (cf. Munger, 2018) were instrumentalised to prevent any 'obstructive' regulation and demolish existing rules preventing the unregulated use of technology(ies) and the factory system. The notion of the (strict) division of labour being needed for prosperity was inextricably linked to the notion of the necessity of the automation of work and systematic control and surveillance of working processes and workers, which were linked to the heroising of industrial capitalists and the derogatory claims about workers (Merchant, 2023; Mueller, 2021). Here the idea of the maverick entrepreneur, the top of the division of labour who is solely responsible for the progress of society, as well as for wealth creation, and providing jobs and opportunities, became dominant and hegemonic. Simultaneously, it was in this context that industrial capitalists made their instrumental image of the inherently lazy worker, who is child-like, undisciplined, unpredictable, ungrateful, which has become the dominant framework for the way society imagines workers, that is still present today (e.g., Bezos' rationalisation of the hyper-surveillance of workers in Amazon's warehouses) (Harris, 2023). The need for the division of labour and the interlinked notion regarding the characteristics of capitalists and workers implied that capitalists – the overseers, the '*producers*' – should be in charge and control the division of labour as they see fit, while the automation of work processes began to be imagined as a central element of enacting and controlling it.

The notion of the automation of human work is older than industrial capitalism because it was present in antiquity and initially tied to hopeful visions of a future in which work would become unnecessary for human prosperity (Mayor, 2018).

This utopian vision of the automation of labour was retained in the industrial revolution, albeit with specific twists and linked to the ideological legitimisation of the factory system. It was/remains a vital element of techno-deterministic and utopian notions of automation technologies, including the newest generative AI. Still, from the outset the industrial capitalist notion was imagined as inevitable, as part of the transhistorical process of technological development and not a set of choices of the industrial capitalists. Accordingly, its *n*egative effects on workers and communities had to be seen as unfortunate but unavoidable given the wealth the factory system, built on the automation of labour processes, had already created for the state, and notably for the elites. However, above all, due to its contribution to a prosperous future for all of society, including the now destitute, poor, exploited and expropriated workers who, following A. Smith, would benefit in the long run since new, better jobs would be created (Merchant, 2023). The latter was never the case as automation in itself has never led to the creation of better jobs and working conditions. These have instead always been an outcome of the collective struggle of workers (Mueller, 2021).

An insidious aspect of the notion of automation is tied to the central logic of the capitalist mode of production, the law of value, and the fact that value is primarily produced through human labour. The capitalist fantasy that can never be achieved but was and still is very popular among the most ruthless industrial capitalists (e.g., Bezos, Musk), political, media and scientific elites as well as engineers is the fantasy of automation completely replacing workers, the fantasy of a fully automated profit machine. This notion was/is used to discipline and control workers. It has frightened workers regarding their future 'inevitable' unemployment and thereby led them to accept the worsening of their working conditions and compensation. Moreover, it was and is utilised to disguise the fact of the inescapable need of human labour, of constant human intervention for any kind of automation to work properly in the long run (Benanav, 2022). The 'ghost work' that enables generative AI to not be completely useless is not historically exceptional but a contemporary materialisation of these processes that enable capitalists to further exploit workers by hiding their crucial contribution – their work – and in this way having even greater control over the production process, turning people into invisible cogs in the machine (Gray & Suri, 2019). This fantasy was/is part of a wider notion of the need for the factory system where the requirement to automate as much of the productive process as technologically and financially viable was key. Another key part were the notions of the need to organise a mass of workers into a massively substantial productive force achieving maximum efficiency to compete and dominate in national and global markets in the context of strong competition among imperial states. The factory system was imagined as (and actually was) the backbone of the British global hegemony established over the world capitalist system (Merchant, 2023). Consequently, these ideas were inextricably linked to the notions of the need to implement systemic and systematic surveillance of workers and minutiae control of workers activity in various steps of the productive process. This included the notion of the need for a strict shifts-based regime of production and the necessity to continuously further segment the process of commodity production into smaller and smaller steps that require ever fewer individual skills of workers. The basic motivation for automating the productive process was that complex, skilled human labour can be divided into a set of multiple simpler steps which can be more efficiently performed by automated machines; that these can be operated by presumably unskilled labour whose work is directed by these machines to which they are expected to adapt; and that these should be controlled by overseers-managers-entrepreneurs-capitalists as the proper rational autonomous subjects in this process. The ideas of automating capitalist production were labour-saving in a very specific way in the sense of adding further to capitalists' power vis-à-vis workers. They were explicitly anti-democratic, hierarchical and authoritarian, and an instrument of the rationalisation of capitalist asymmetrical power relations between capital and labour (Benanav, 2022; Harris, 2023; Merchant, 2023).

They shunned all ideas about ordinary workers and citizens having the right to participate in and influence the development and implementation of technologies. These ideas were crucial in legitimating ever novel technologies for automating the work of humans regardless of their negative effects on workers and societies, irrespective of who develops them, who makes the central but always obfuscated decisions on their characteristics, who owns them, who directs and oversees their operations, who reaps enormous profits from them, and who gains unprecedented power due to them. The ruthless industrialist strived to present their introduction of the factory system as a moral good, as morally just, since progress is just and morally good. At the same time, they were hailed by the political elites, the media, and the government for being beneficial to society (cf. Merchant, 2023).

The British industrial revolution was also the context in which the ideological structure was expanded with the discourse to counter resistance

to capitalist technologies and their development. Here the Luddite movement and the response of industrialists, political elites, the state and the media to it had a central role. The Luddite movement was the first collective systematic resistance to implementation of the factory system and as such faced the ultimately successful brutal repression and ideological denigration by the elites in society. In fact, the elite's efforts were so successful that the term Luddite even today remains a derogatory term for people who supposedly irrationally oppose technological progress, and are techno-phobes as they lack understanding of the benefits brought by novel technologies. Nonetheless, this negative fantasy is far from the truth because they were knowledgeable machinists and lucid critics of specific technologies and their implementation; namely, those that concentrated power in the hands of industrialists, disempowered workers and destroyed communities. Despite being among the first to articulate various ideas that benefited worker's wellbeing (e.g., the minimum wage) later adopted by workers movements in their generally successful fight for material benefits, their critical perspective on technology was silenced. What remained even in revolutionary left circles was quite a naïve understanding of technology(ies) as a neutral instrument that can be harnessed for emancipatory ends without issues even though their characteristics are in line with the imperatives and logic of capitalist accumulation. Contrary to today's fatalistic and deterministic visions of industrialisation, its total dominance was not a given but a product of powerful societal forces that prevailed in their struggles with workers (Merchant, 2023; Mueller, 2021; cf. Noble, 1999).

In the final part of our analysis, we consider certain ideological notions that consolidated and expanded the ideological structure and appeared in the context of the genesis of modern computational thinking. This is important since our contemporary context is ideologically and materially dominated by digital computer technologies, which obfuscate the relative oldness of computational thinking and its deep connections with the factory system, industrial automation, colonial slave plantations, and the subsequent establishment of the post-war neo-imperial, regulatory welfare state.

MODERN COMPUTATIONAL THINKING, MODERN ICTs, AND EXPANSION OF THE IDEOLOGICAL STRUCTURE

The fact that the father of modern computational thinking Charles Babbage was a major proponent of the interests of British industrial capitalists and a proclaimed enemy of organised labour and democracy that he believed was incompatible with capitalism can be seen as predictive of later computer technologies (cf. McQuillan, 2023). Babbage developed his notions and proto computers (difference and analytical engine) as part of an answer to the question faced by industrial capitalists about how to establish general control over and discipline the workers to assure stable production and stability of the factory system in order to consolidate the hegemony of the British empire around the world. This issue became especially relevant after the abolition of slavery, which called for a reorganisation of the industrial production processes that had relied heavily on a primary commodity (e.g., cotton) production by a slave population. That reorganisation transformed the nominally free workers into docile, disciplined cogs in the machine whose work was segmented, directed and surveilled for maximum efficiency and to minimise resistance it had to be seen as a legitimate step. Babbage's design of his analytical engine and the characteristics of the factory system indicate a deep connection with slave plantations. He was directly inspired by the operation and features of the modern slave plantation whose goal was to totally control, direct and surveil the slaves' lives to maximise their exploitation (Whittaker, 2023). Productive quotas, the exact number of workers, and time limits tied to specific work tasks developed via measurements, and the specification of tools and skills required to optimally perform specific tasks were techniques developed on slave plantations. They provided direct inspiration for developing the factory system and Babbage's analytical machine. Controlling and disciplining workers at a distance via automated machinery that enabled complex tasks to be broken up into simpler tasks for which a worker's movements were precisely defined and the time needed was at the heart of not only the modern factory system but modern computational thinking and computers as well (cf. Whittaker, 2023).

Babbage's computers were built on the notion of the automation of mathematical calculation by segmenting complex mathematical processes into parts able to be done by workers possessing rudimentary mathematical skills. His programmable analytical engine represents the central paradigm of modern computer technologies not simply because of the large amount of automated calculations. It specifically established the stark division of work and hierarchy between developers of computer programmes, the engineers who set the design and function of a computer, and the workers and other users who are deskilled and disciplined by the machine-programme they are working on or using without any possibility to substantially alter it (McQuillan, 2023; Whittaker, 2023). Similarly, to automation, the notions and presuppositions of computational thinking and machines were

developed not to support the emancipation of humanity and workers in particular, but following the imperatives of the capitalist social form and its need to control, discipline and subjugate workers.

The arguably final foundational expansion and consolidation of the ideological structure linked to computational thinking concerning the notions associated with the technological solutionism of central socio-political and economic issues can be traced to the proper birth of modern computers and computer networks (modern ICT) during the Second World War. This was constitutively connected with the emergence of the novel US-dominated global order built on its technological capabilities, its supremacy in novel computer-based technologies which enabled the USA to supplant the British empire as the centre of the capitalist world system, as the centre of technological innovation (Harris, 2023). It was connected with the capitalist state's material and ideological reorganisation into its modern administrative, regulatory, welfare and neo-imperial form. Here the novel computational thinking and technologies played a core role, and they had an inherently post-democratic, post-political, authoritarian and anti-emancipatory characteristic because they were a main element of the novel postwar technocratic and techno-solutionist ideological framework for governing, regulating, disciplining, normalising and optimising national and global populations predicated on faith in being able to solve any conceivable societal issue technologically. The principal purpose of this framework was to establish the conditions for stability, social cohesion, and unprecedented expansion for capitalist accumulation. Liberal democratic politics were seen as too unpredictable, irrational, and as an unproductive clash of interests compared to technological-based solutions, which were framed as a superior substitute for potentially destabilising politics (Levine, 2019). This could only be claimed in relation to the particular reductive understanding of humans, society and nature on which the pioneering computer engineers based their expansion of computational thinking during and after the Second World War and which became a major addition to the ideological structure underlying postwar capitalist society. Such an understanding stemmed from the notion that computer models for ordering, classifying, regulating populations and for creating hierarchical, stabilising and prediction-based imagining of the social and natural world were a neutral mirror of it. Still, the world established by these models was always-already characterised by its conservative and reactionary nature since it reified existing capitalist structures, institutions, relationships, interests, and values. It obfuscated the existing asymmetrical power relations together with the various choices made while developing these models, their implicit characteristics, preferences, and the interests and values embedded in those choices. These models of computation and their societal proliferation did/do not expand the agency of common citizens and instead were/are a vehicle for the further concentration of power, as made even more opaque by describing the decisions/solutions based on them as neutral and optimal (Bridle, 2018; Weizenbaum, 1993). Models and computer technologies became a fixed part of the corporate sector and welfare institutions and of the state's repressive apparatus as instruments of surveillance and control, and of counterintelligence, for preventing and tackling domestic and foreign resistance to the existing imperialist-capitalist national and global order (Levine, 2019; McGuigan, 2023).

Paradoxically, the subsequent expansion of this ideological framework in the 1980s managed to retain the mentioned model-based techno-solutionist framing, while adding a techno-utopian notion of computer/network technologies as being inherently emancipatory, liberating, decentralising (as inherently good) and democratic/anti-authoritarian. This helped conceal the military origin of computer/network technologies, while also legitimating and rationalising the later monopolisation of the digital technology sector by delegitimising any public regulation of it as authoritarian and anti-innovation, and obfuscated the inherent emancipatory limits of these technologies of atomisation, surveillance, control and concentration of power in the hands of a few technological mega corporations and the US state (Harris, 2023; Levine, 2019).

CONCLUSION

In the article, the ideology of technology and its development was analysed as a vital underlying ideological structure of the modern capitalist neo-imperial order that was/is very important in the genesis and the (re)production, justification and legitimisation of this system and its asymmetrical power relations. We explained why this under-analysed ideological structure must be viewed as one of the primary ideological obstacles for imagining and implementing sustainable, democratic and emancipatory transformations of the system. Such transformations in the context of the polycrisis of the modern order today are existentially needed given that various dimensions of the crisis, above all the ecological/climate crisis, are rattling the system's foundations and clearly reveal its ecologically unsustainable nature. Yet, to imagine the alternatives we claimed a critical interrogation of the underlying ideological structure is needed since the latter remains the naturalised framework in which

dominant solutions to the polycrisis are formulated; solutions reliant on unwavering, albeit misplaced faith in capitalist technological development, technologies and the corporations and techno-oligarchs that own and/or control them. Namely, faith in the simultaneous inevitability of specific technological solutions, their inherent emancipatory nature, the neutral nature of technologies and their implementation, their neutral and singular development, and their inevitable benefit for society, politics and the environment, and the non-problematic nature of excluding the public from decisions about the direction of technological development. A prime example of the latter is the development and implementation of ecologically, socially and politically unsustainable generative AI technologies owned and controlled by unaccountable corporations/oligarchs as universal solutions to the polycrisis. This led us to critically interrogate the genesis and development of the major foundational elements of the ideological structure underlying technology, which has enabled, reproduced and naturalised such faith from its beginnings in modern political thought to the industrial revolution and digital-computer revolution. We reflected on technological determinism, utopianism, solutionism, the secularised divinisation of technological development, the obfuscated privileged individual (bourgeois, white, Christian male) and collective (Western men) subject of technological development, and the notion of technology(ies) being owned exclusively by the capitalist as the only subjects imagined to be productive (not actual labours). The analysis considered the notions of automation being inherently good irrespective of the destitution, poverty, deskilling and disempowering of workers and centralisation of power in the hands of capitalists which rationalised industrialisation. Also examined was the notion that technologies and their development are neutral, part of a transcendent process that should neither be stopped nor regulated, that there is no alternative to their implementation because in the long rung they will benefit all of society. We reflected on the ideological tools used to combat resistance to technologies centred on the notion of the Luddites, who contrary to historical facts were framed as irrational, anti-modern haters of technology. We analysed the anti-emancipatory, authoritarian, disempowering nature of computational thinking in the contexts of industrialisation, the postwar computer revolution, and birth of the notion of computer-based models of the natural and social world. These provided the foundation of the postwar neo-imperial capitalist regulatory welfare state. Models remain an inherent part of the technocratic dimension of our present order which views democratic politics as messy, unpredictable and unproductive and obfuscates the inherent limits and repressive dimensions of these classificatory, predictive and decision-making models built around techno-solutionism. Finally, we briefly reflected on the modernisation of techno-utopianism thinking with the birth of personal computers and the Internet where these have been framed as inherently empowering, emancipatory and democratic, which with the hindsight provided by our current context of corporate monopolies that dominate these technologies and our lives have proven to be problematic and an obstacle to the articulation of proper alternative emancipatory solutions to the polycrisis.

IDEOLOGIJA TEHNOLOGIJE IN NJENEGA RAZVOJA IN POLIKRIZA SODOBNEGA KAPITALIZMA

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POVZETEK

Članek kritično reflektira ideologijo tehnološkega razvoja in tehnologije kot konstitutivno ideološko strukturo modernega kapitalizma in kot hkrati temeljno oviro za razvoj trajnostnih, emancipatornih in demokratičnih rešitev in vizij za razreševanje politikrize. Slednja večdimenzionalna kriza, ki zajema tako politično, geopolitično, ekonomsko kot ekološko dimenzijo, je namreč pričela korenito destabilizirati obstoječo kapitalistično ureditev na lokalni in globalni ravni ter spodkopavati same temelje njenega obstoja. Kljub temu, da dosedanje naslavljanje krize ni bilo uspešno, so rešitve in vizije razreševanja še vedno osrediščene na problematični veri v zmožnosti tehnološkega razvoja, novih tehnologij in tehnoloških korporacij ter tehnoloških oligarhov, ki izhaja iz utemeljujoče ideološke strukture. Opirajoč se na materialistično-neoludistični analitični okvir članek najprej naslovi temeljno razmerje med kapitalizmom in tehnološkim razvojem ter vlogo ideološke moči v (re)produkciji ureditve. Glavni analitični del pa je osredotočen na identifikacijo in analizo idej, ki so v specifičnih temeljnih prelomnicah razvoja kapitalistične ureditve zamejevali razumevanje tehnologij in tehnološkega razvoja in širše legitimirali in racionalizirali kapitalistično ureditev njene imperative in logiko nenehnega večanja akumulacije kapitala v okviru teh zgodovinskih prelomnicah, kot tudi omejevali alternativne vizije razvoja tehnologij in njihovih značilnosti ter lastništva in učinka. Najprej so analizirane ideje, ki se pojavijo s pojavom moderne politične in družbene misli. Temu sledi analiza idej v okviru industrijske revolucije. Analiza se zaključi z osredotočanjem na ideje v okviru geneze in razvoja računalniške miselnosti, ki vzajemno omejujejo alternativne vizije tehnološkega razvoja in tehnologij preko utrjevanja idej tehnološkega determinizma, optimizma, solucionizma in neizogibnosti zasebnega usmerjanja tehnološkega razvoja in zasebnega nadzora nad tehnologijami.

Ključne besede: ideologija, tehnologija, tehnološki razvoj, kapitalizem, polikriza, industrijska revolucija, računalniška miselnost

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KAZALO K SLIKAM NA OVITKU

SLIKA NA NASLOVNICI: *Barvna ilustracija Ančke Gošnik Godec za zgodbo* Za lahko noč *v zbirki* Za lahko noč *Ele Peroci (od leta 1964)*.

Slika 1: *Ilustracija Ančke Gošnik Godec za zgodbo* Kdaj je Ljubljana najlepša? *v zbirki* Ptičke so odletele *Ele Peroci (1960)*.
Slika 2: *Predlisti prve izdaje Cvetkovici, risba Rajka Kovačevića, 1981* (Vir: Lukić, 1981).
Slika 3: *Ilustracija Ančke Gošnik Godec za zgodbo* Za lahko noč *v zbirki* Ptičke so odletele *Ele Peroci (1960)*.
Slika 4: *Ilustracija Ančke Gošnik Godec za zgodbo* Kdaj je Ljubljana najlepša? *v zbirki* Ptičke so odletele *Ele Peroci (1960)*.
Slika 5: *Ilustracija Ančke Gošnik Godec za zgodbo* Za lahko noč *v zbirki* Ptičke so odletele *Ele Peroci (1960)*.
Slika 6: *Ilustracija Ančke Gošnik Godec za zgodbo* Za lahko noč *v zbirki* Ptičke so odletele *Ele Peroci (1960)*.

INDEX TO IMAGES ON THE COVER

FRONT COVER: *Colour illustration by Ančka Gošnik Godec for the story* Za lahko noč *in the collection* Za lahko noč *by Ela Peroci (since 1964)*.

Figure 1: *Illustration by Ančka Gošnik Godec for the story* Kdaj je Ljubljana najlepša? *in the collection* Ptičke so odletele *by Ela Peroci (1960)*.
Figure 2: *Frontpapers for the first edition of Cvetkovci, drawing by Rajko Kovačević, 1981* (Source: Lukić, 1981).
Figure 3: *Illustration by Ančka Gošnik Godec for the story* Za lahko noč *in the collection* Ptičke so odletele *by Ela Peroci (1960)*.
Figure 4: *Illustration by Ančka Gošnik Godec for the story* Kdaj je Ljubljana najlepša? *in the collection* Ptičke so odletele *by Ela Peroci (1960)*.
Figure 5: *Illustration by Ančka Gošnik Godec for the story* Za lahko noč *in the collection* Ptičke so odletele *by Ela Peroci (1960)*.
Figure 6: *Illustration by Ančka Gošnik Godec for the story* Za lahko noč *in the collection* Ptičke so odletele *by Ela Peroci (1960)*.


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