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SLOVENE MINORITY ISSUES

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Abstract

The contribution explains the historical development of the political boundaries of Slovene states and the creation of minorities as political bodies in Slovenia and in the neighboring countries, as well as the creation of Slovene Diasporas in Europe and around the world. The ethnic development of Slovenes can only be understood within the context of the general ethno-national, political-territorial and socio-economic processes in Europe since the beginning of 19th century. In the treatise, we deal with ethnic minorities and minority policies as typical political heritage of Europe: the destiny, problem and challenge, but an advantage as well. Due to the size and importance of minorities, Slovenia count to the minority sensible countries. Legal and actual Protection of autochthonous minorities in Slovenia is normatively wide and realized consistently, while Slovene minorities in neighboring countries have much worse formal-political baseline.

Key words

Slovenes, Slovenia, ethnic minority, diaspora, Slovene history.

1. Introduction

Slovenia is a small Central European country, known by its minority policy. Regarding the level of minority protection standards per capita, the Italian and Hungarian community can be counted as the highly protected national minorities in Europe. From the other point of view, the national development of Slovenes is comparable central-european story, where the creation of ethnic community is much older than the making of political-territorial unit (or state). Established in 1991 and internationally recognized in 1992, Slovenia is among the youngest countries in Europe, but its political borders have much larger

(and older) background. The minorities are, however, a result of these dynamic political processes.

Slovenia lies on crossroads; there, where the eastern part of the Alpine Arc passes through the lower hills into the Dinaric Mountains and delineates the continental Pannonian basin from the Mediterranean Northern Adriatic. Its' size is 20.273 km² and has 2,066.000 inhabitants. Traditional settlement territory of the Slovenes borders on the Italian, German, Hungarian and Croatian ethnic area. The area was until the crossroads of the 1990s as part of the non-aligned socialist Yugoslav federation at the

military-strategic point of contact among the NATO Italy, neutral Austria and Hungary, which belonged to the Warsaw pact. After a brief war Slovenia became independent nation in 1991 and less than two decades later joined the EU and NATO in 2004 and entered into the Eurozone and the Schengen area in 2007. Slovenia is a country of ethnic Slovenes, people of 2.4 million. The majority of them (approximately 1.8 million) lives in Slovenia, some 150,000 in neighboring countries and circa 500,000 in diaspora around the world (Zupančič, 2001). The ethnic development of Slovenes and the political consequences can only be understood within the context of the general ethno-national, political-territorial and economic-social processes in Europe since the beginning of 19th century. Slovenes are a people with the old and rich culture and relatively late political affirmation. Slovenia became an independent country during turbulent geopolitical changes after the fall of communist regimes and dissolution of multinational Yugoslav federation.

Slovenia is often described as "Alpine" land, which roughly corresponds to the geological-tectonic criteria as well as economic and social mentality of its inhabitants. Most of the state lies between 300 and 700 meters above the sea. It lies on the mountainous terrain and its climate intermingles Alpine, continental and Mediterranean. These climate types influences varied and rich flora and fauna. The current territory of the Slovene state was determined by the previous state systems and their economic, administrative and cultural policy (Natek, Natek, 1998). Slovenes have lived for centuries under the Austrian (Habsburg) Monarchy, which strongly influenced its cultural landscape. Also Northern Italy had an impact on the development of Slovenia. Because of the time proximity in particular Yugoslavia through the socialist social and economic heritage left important traces. These traces can be seen in administrative borders, widely understood material and spiritual culture, regional identities and mentality. Mosaic structure of Slovene cultural landscape also highlights the predominantly retail-settlement system. Slovenia has more than 6,000 settlements, reflecting the adjustment of the potential exploitation of the agricultural land on the rugged hilly terrain. In addition also important are small urban areas which are late result of a very intensive industrialization and relatively weak urbanization; with 51% of the urban population the least urbanized country in Europe (Natek, Natek, 1988).

2. Brief Slovene national history

The ancestors of the Slovenes (Alpine Slavs) inhabited the area of approximately 80,000 km², extending between the eastern Alps and western Carpathian Basin in the north stretched to the Danube, in the west to central parts in Bavaria, in the east to Lake Balaton, and to Istria in the south, in the 6th century. Around the year 900, 10,000 km² of this area in the western part of the Pannonian Plain was occupied and settled by Hungarians (Magyars). They magyarized it until the end of the 11th century. Off the remaining 70,000 km², approximately 36,000 km² was settled in the 15th century by Bavarian-Germans, and around 24,000 km² remained populated by the ancestors of today's Slovenes and represent the cornerstone of Slovene National Development (Grafenauer, 1994).

The ancestors of the Slovenes had their first state formed already in the 7th century. It was the tribal principality of Carinthia, which soon came into the feudal relationship (due to defending against Avars on the east) with the Bavarians and later the Franks. A typical residue of the first period of Slovene statehood was the ritual of installing Carantian princes, and later dukes of Carinthia. It was held in the archaic Slovene language and preserved until 1414 (Grafenauer, 1952). Because of its unusual shape this ritual aroused the interest of later writers. It is described in the book of the French jurist and political philosopher Jean Bodin (1580), *Les six livres de la République*, in which also Thomas Jefferson read about it. Based on his bookmark in the book on page 129, where the ceremony is mentioned the theory aroused that the latter inspired Jefferson in writing the American Declaration of Independence (Declaration of Independence); especially in the part where the equality among human beings and the indivisibility of their fundamental rights is mentioned (Felicijan, 1967; Štih, 2005). Subsequent important events in Slovene history until the mid-19th century were peasant uprisings and reformation. The latter brought the codification of the Slovene language (grammar and the first translation of the Bible in the Slovene language).

The first modern political manifestation of Slovenes as people began in the revolutionary year of 1848, when Slovenes in their political program, "Unified Slovenia", demanded the unification of all territories inhabited by the Slovene population in one political unit within the Habsburg Monarchy (Granda, 1999). Administrative reform, or merger of lands with Slovene population (Carinthia, Styria, Carniola, Gorizia, Trieste and Istria and in parts of the Hungarian Zala and Vas counties in one unit mainly aimed to

achieve cultural objectives. In this new administrative unit Slovene was supposed to be the language of the administrative bodies, teaching and judiciary. Surely, the idea was very far from being fulfilled. But since then, the national idea was "alive" during all the time. What followed later was the policy of small steps by the leaders of Slovene political parties as the result of the political pragmatism of resistance against Germanization, Magyarization and partly Romanization. These objectives have remained unrealized. The result of a division of the Habsburg monarchy in the Hungarian and Austrian half (1867) was that northeastern parts (s. c. Slovene Kraina or Véndevidek in Hungarian) came under the Hungarian part of the Double-Monarchy. A year before (1866) the Venetian Slovenes decided (by plebiscite) to remain within Italy. The idea of "United Slovenia", which was until all popular assemblies movement (so called *taborsko gibanje*) limited to the narrow circle of students, intellectuals and priests became popular in the years 1868–1871. People gathered in all Slovene provinces and demanded the fulfillment of the idea of United Slovenia (Gestrin, Melik, 1966). These political tensions were a part of much larger demands of Slavic ethno-nations (Czechs, Slovaks, Poles, Ukrainians, Croats, Serbs, beside Slovenes) in the framework of pan-slavic movement within dual-monarchy¹. In the second half of the 19th century, Slovenes achieved significant successes in the implementation of the demands for Slovene language in schools and offices, especially in Carniola and southern Styria. There Slovene language became an official language in municipalities. Based on the third article of the Carinthian provincial constitution of 1849 which proclaimed equality of both peoples of Carinthia bilingual local directories, bilingual Code and the Provincial Constitution was printed in German and Slovene also in Carinthia (Schnabl, 2016). Slovene, however, was also partly enforced in municipal administrations throughout the Slovene ethnic territory. So this is a period when Slovenes became politically aware of themselves and demonstrated their political will: to preserve their language and unique culture by organizing institutions on the basis of their ethnicity.

The beginnings of industrialization in the Slovene ethnic territory since mid of the 19th century and beyond was marked by intensified Germanisation, Italianization and Hungarianization of Slovene population; on the one hand due to the immigration of German, Italian and Hungarian population

to the Slovene ethnic territory, on the other hand due to intensive emigration of the Slovene population. Due to mass emigration and assimilation pressures of numerically stronger nations, the number of Slovenes in the Slovene ethnic territory grew very slowly. Thus, in the lands of the western part of the Habsburg Monarchy, among which the majority of the Slovene ethnic territory was divided, the number of Slovenes between 1846 and 1910 increased only from 1.055 million to 1.253 million, or 18.76%. Share of Slovene population in this period in the region fell from 46.1% to 40.0% (Zwitter, 1936).

The geopolitical changes came soon in the beginning of 20th century. The First World War marked a turning point in the Slovene History, because part of the Slovene ethnic territory after the collapse of the Habsburg monarchy merged with the territories of other South Slavic ethno-nations into the Kingdom of Serbs, Croats and Slovenes (since 1929 Kingdom of Yugoslavia). Approximately 15,750 km² of the Slovene ethnic territory belonged to the Kingdom of Serbs, Croats, outside its borders remained approximately 8,700 km² of territory settled by Slovenes (or 65%); from that in Italy on approximately 6,000 km² with 340,000 Slovenes, circa 2,600 km² with 80,000 Slovenes in Austria and much smaller in Hungary: close to 100 km² and close to 8,000 Slovenes. Outside the Kingdom of Serbs, Croats remained around 428,000 or around one third of all Slovenes settled on their traditional territories.

After dissolution of multinational Habsburg Empire, Slovenes entered into another multiethnic political unit: the SHS state, later Kingdom of Yugoslavia. In 1918 began the Slovene history within the Yugoslav state. During this period of Slovene history, the Slovene politicians fought for decentralization and federalization. The Slovene language was introduced as language of the schools, official language in offices and in the courts, but there was no way to establish Slovene as an official language at the national level. This is the period when the University opened in Ljubljana, as well as a number of secondary schools in other central places in Banovina of Drava (slov. *Dravska banovina*) was administrative-political unit in Yugoslav kingdom established in 1929 with predominantly Slovene population.

After two decades, the peace-period was over. World War II represented the peak of assimilation pressures on the Slovene ethnic territory. After the attack of the Axis forces on Yugoslavia in April 1941 new partition of the Slovene territory occurred. Prekmurje, the northeastern part was occupied by Hungarians, Italians occupied the southeastern regions (Notranjska, Ljubljana and Dolenjska) and the Germans occupied the rest of territory settled

¹ Trialism: political idea and movement for political reconstruction of Habsburg-Monarchy into three parts: Austrian (or German), Hungarian and Slavonic.

by Slovenes (aprox. a good half of it). All parts were included into the occupying-states. The assimilation became most common and mostly very violent policy. Soon they forced mass emigration of Slovene population, either to concentration camps or to Serbia and Silesia. It is interesting to note that on the basis of an agreement between Hitler and Mussolini on the settlement of South Tyrolean question Italians and Germans also agreed upon the emigration of the Gottscheer Germans "back to the Reich" to the area of Brežice which was typical ethnic – motivated colonization (Ferenc, Zupan, 2011). Slovenes reacted with the armed resistance of Partisans against the occupying forces, which soon came under the Yugoslav national liberation movement under the leadership of the Communist Party. This resistance was part of the "anti-Hitler coalition" in Europe. It has played an important role in changing the borders with Italy in the Yugoslav favor. Whereas this resistance was also a communist revolution part of the Slovene population rebelled against it and collaborated with the occupying forces. After the Second World War, the soldiers who joined in the Slovene Home Guard (Domobranci) retreated to Carinthia, where they were captured by the British occupation forces. They returned part of the soldiers of Home Guard units to Yugoslavia. More than 12,000 of them were executed without any court procedures. This fact has been concealed by official politics of the communist regime until the democratization process took place in Slovenia. However, it remained to this day part of the political discourse in Slovenia.

Although the Partisan Army liberated most of the Slovene ethnic territories by the end of World War II, the borders with Austria and Hungary remained unchanged. Yugoslavia gained only some territory (Slovene coastland and Istria) in the west that had belonged to Italy in the period between World War I and World War II. However, the city of Trieste remained part of Italian state when the Free Territory of Trieste established by the Peace Treaty with Italy was divided between Yugoslavia and Italy by the "Memorandum of Understanding Between the Governments of Italy, the United Kingdom, the United States and Yugoslavia Regarding The Free Territory of Trieste" in 1954 (Jeri, 1961). However, it took more than twenty years to determine finally the border between Italy in Yugoslavia, by the Treaty of Ossimo in 1975. Altogether more than 200,000 ethnic Slovenes remained outside the borders of Yugoslavia after World War II as the national minorities in Austria, Hungary and Italy. The protection of Slovene national minorities in the neighboring countries was always an important issue for Slovenia that tried to put pressure upon the Yugoslav foreign policy for

the improvement of the situation and protection of Slovene minorities abroad.

However, the Slovenes in Yugoslavia also found themselves in a contradictory position after World War II. On the basis of the Constitution of 1946 they gained the status of a constitutive part of the Yugoslav federation. Formally, Slovenes gained their own state; their independence was, however, only apparent. Already by the end of World War II the Slovene partisan units were integrated into the Yugoslav Army. Later, Slovenia had to give up much of its autonomy and independence established by the Slovene National Liberation Movement during World War II, when Slovene independent economic, social and cultural policies and institutions were developed. In accordance with the Yugoslav federal constitution, Slovenia retained its governance in education, culture, social- and health care, planning system and urban development. Public administration has common Yugoslav platform, but was made in Slovenia in Slovene language and has, therefore, practically the Slovene character. Police was Slovene as well as limited local military forces (Teritorialna obramba)².

As elsewhere in Yugoslavia, also in Slovenia the Communists took over all the powers after World War II. So they took control over political structures and the Communist Party was the only party allowed. In 1948, the country was under serious threat of soviet military intervention, which did not occurred. This was the breaking point with the other communist countries in Europe in sense of military as well as economic collaboration. Yugoslavia however kept the socialist economic and political system – therefore remained the typical socialist society, but the economic relations with the "west" were of a crucial importance. Slovenia was the only Yugoslav republic territorially bordering with the west (Italy, Austria) and has – despite typical socialist economy – quite a few economic connections and cooperated with western economies. Some enterprises exported up to 80% of their products to the West! Otherwise, the economy was until the mid-1950s characterized by state ownership of means of production. In the 1950s a period of socialist self-management with a typical social ownership of the means of production began.

² Teritorialna obramba (eng. Territorial defense) was a part of total defense system, developed in Yugoslavia due to the geopolitical position of Yugoslavia, after 1968. The units based on commune level had to defend the local areas in the case of occupation. Among all Yugoslav republics, Slovene territorial defense forces were far more organized, equipped, led and skilled in military profession than in any other part of Yugoslavia. They were however a part of common (Yugoslav) military. The commands were all in Slovene language.

At the end of the 1980s as in other Eastern European countries also in Slovenia and Yugoslavia the democratization processes began; and with them also demands for greater independence of Slovenia; at first, still within Yugoslavia. In 1990 the first democratic elections, were carried out in which democratic parties won. The leaders of the new government called for a plebiscite on Slovenia's independence in December 1990 in which almost 90% of all the voters voted for independence, which was declared on 25 June 1991 (Klemenčič, Žagar, 2004).

3. Slovene ethnic minorities in neighboring countries

The Slovene minorities in neighboring countries are a result of dynamic political processes in first half of 20th century. Therefore, they represent a direct result of new political borders after the First and the Second World War. Slovene communities in the border regions are much older; these spaces were an important part of Slovene ethnic body and gave evidently important contribution to the creation of Slovene ethno-nation and national movements of Slovenes during Habsburg rule in these areas. The First World War marked a turning point in the Slovene History, because part of the Slovene ethnic territory after the collapse of the Habsburg monarchy merged with other South Slavic peoples in the Kingdom of Serbs, Croats and Slovenes (since 1929 Kingdom of Yugoslavia). Outside Yugoslavia remained around 8,700 km² of the territory settled by 340,000 ethnic Slovenes, which was a little bit more than one third of the Slovene ethnic territory as well as of ethnic Slovenes who lived on this territory.

Actual and legal protection of Slovene indigenous minorities was not adequate in all three countries (Italy, Austria, and Hungary). This was still a period of integral nationalism, during which the nation-states followed the idea of ethnic homogeneity. The minorities were very often seen as a threat to the country where they live. The nation states' policies towards them aimed to assimilate the minorities, or even worse, to force them to emigrate and thus ethnically cleanse the region of their settlement. The assimilation pressures on the outskirts of the Slovene ethnic territory continued and gained strength during this period. Thus, in Italy the fascists shortly after their arrival (in 1920s) to power prohibited the use of the Slovene language in schools and all other public institutions. Also physical attacks on

the Slovene population occurred. For this reason, the Slovene mass emigration from the Western part of the Slovene ethnic territory which was under Italian rule (The Littoral)³ to Yugoslav Slovenia, as well as to South America and Australia strengthened. The delimitation process between Austria and State of Serbs, Croats and Slovenes was turbulent. After some military attempts, the great powers decided for plebiscite⁴ as a delimitation tool. In Southern Carinthia (Austria) in the year 1920 the majority of the voters decided in a plebiscite that it will belong to the Republic of Austria. In doing so, they did not decide on ethno-nationality only. It was a political decision and calculation, based on the fact, that Austria was at that time advanced and industrially developed republic, and the Yugoslav state economically weak backward Balkan kingdom (Zupančič, 1999). It is necessary to mention the fact that the Carinthian provincial assembly before the plebiscite promised by a solemn declaration to Carinthian Slovenes that they would be able to maintain and foster their identity in Austria. Already a few days after the plebiscite all these promises were "forgotten" and Slovene was "expelled" from public institutions and schools, Slovene intellectuals had to emigrate in large proportions to the Yugoslav Slovenia or overseas countries. Pressures on the Carinthian Slovenes have reached its peak after the Anschluss of Austria by the German Third Reich in 1938. With the intention of ethnic cleansing of the region the Nazis sent many Slovenes to concentration camps during the World War 2. Slovenes in Hungary were also exposed to similar assimilation pressures. The situation worsened during the World War II.

After the World War 2 there were several changes of border with Italy in favor of Slovenia/ Yugoslavia, while the national frontier with Austria and Hungary remained unchanged. The question of protection of Slovene minorities in neighbor states became an important political issue for Slovenes, since there lived large Slovene minorities in Italy and Austria, and much smaller in Hungary. In Austria the legal base for protection of the ethnic/ national minorities can be found already in article 19 of Austrian Constitution in 1867. It is also the Treaty of Saint Germain of 1919. The most important document regarding the

³ Littoral (in Slovene: Primorje or Primorska) sourcing from Austrian province (Austrian Littoral), which was (beside city of Trieste with particular city statute and Istria) an administrative unit in Austrian part of double Austro-Hungarian monarchy. The term »littoral« remain and was later used as a common name for the whole territory settled by Slovenes (and partly Croats, in Istria) ruled by Italy.

⁴ Plebiscite were commonly used in delimitations between new established countries in Central Europe after WW1.

protection of Slovene minority in Austrian provinces of Carinthia and Styria is the Austrian State Treaty of 1955⁵, especially its Article 7. The Austrian authorities continued assimilation pressures on Slovenes of Carinthia and Styria even after 1955. They reached its peak in 1970s with the War of bilingual localities signs and with the special census of population of 1976. With this census the Austrian authorities searched for Carinthian Slovenes in the whole Austria; although the world knew where Slovenes of Austria lived. Even during the 1970s and 1980s there were several cases of physical attacks on Carinthian Slovenes. The changes of the law regulating bilingual education of elementary school children put further pressure on Carinthian Slovenes. The Austrian constitutional court established a few times in 1990s and 2000s that Austria failed to realize provisions on minority protection fully. The provincial- as well as federal Austrian authorities tried to minimize the minority protection (Klemenčič, Klemenčič, 2010). The situation of the Slovene minority in Austria improved slightly after years of negotiations the Austrian parliament passed a new law on protection of Slovene minority in 2011.

For Slovenes in Italy the most important documents regarding their minority protection are the Peace Treaty with Italy of 1947, "Memorandum of understanding on Trieste of 1954" and some bilateral treaties between Italy and Yugoslavia; most important among them Osimo Treaty of 1975 included also provisions on the protection of the Slovene minority. However, these provisions have never been fully put into practice and the Italian political elites always found reasons and ways how to avoid the fulfillments of these diplomatic agreements. After years of negotiations and political maneuvering the Italian Parliament passed the special law on the global protection of the Slovene national minority in Italy as late as 2001. At a formal level this meant that after three decades of endeavors the Slovenes in Italy at least formally enjoy minority rights throughout the territory of their historical settlement. The law was realized only in 2009. In addition, Italian neo-fascists physically attacked Slovenes of Italy and their institutions physically attacked by Italian neo-fascists until late 1980s.

Nevertheless, in the period of the "Cold War" the situation of the Slovene national minority living in

an underdeveloped part of Hungary behind the "Iron Curtain" was much worse than the situation of the Slovenes in Italy and Austria. The situation of this minority started to improve when the gradual liberalization in Hungary in the 1980s took place, yet improved substantially in the 1990s when representatives of Slovenia and Hungary signed a bilateral agreement on the protection of national minorities between Slovenia and Hungary.

Today, Slovene minorities live in border areas of neighboring countries. The minorities took important part in Slovene foreign affairs. Slovenia is the successor state of former Yugoslavia and therefore has inherited succession of contracts and agreements that were concluded during the existence of Yugoslavia. Based on these agreements the Republic of Slovenia with a high degree of autonomy was able to support them. Slovenia during the Yugoslav period actively took care of Yugoslav diplomatic efforts which were made in regulating minority issues as part of diplomatic relations with the neighboring countries. Slovenia financially supported activities of Slovene minorities. It also took part thru its diplomats in the work of diplomatic and consular missions in the regions where Slovenes live and in promoting cross-border economic and cultural cooperation. The policy towards minorities in neighboring countries sometimes has to adapt to general political circumstances and could be less principled – which can also be a problem.

The Slovene minority in Austria inhabits around 2,600 km² of territory in southern Carinthia and most Southern Styria, where lives, according to official Austrian census data, in 2001 about 13,000, according to Slovene estimates, 45,000 Slovenes (Klemenčič, Klemenčič, 2010; Zupančič, 2013). Outside these areas in Austria live more than 5,000 Slovenes, mostly in Vienna and Graz (Zupančič, 1999). Basic legal document for the Slovenes in Austria is the Article 7 of the Austrian State Treaty of 1955, which was written as a compensation to territorial changes in favor of Slovenia (then Yugoslavia) and provides a wide range of minority rights in a given territory. Second Austrian Republic largely ignored or even violated, as far as education or bilingual topography (Klemenčič, Klemenčič, 2006). Education is organized in the framework of the public education network, but not as a special minority schools, but implement bilingual education. The success of this model is relatively modest. There are many successful private mostly Catholic) kindergartens. Secondary Education stands at the provincial and Austrian levels for effective multilingual educational model. Minority is organized into three umbrella organizations, left-oriented Association of Slovene

⁵ Austrian State Treaty of 1955 is an international diplomatic agreement among major powers (USA, United Kingdom, France, Soviet Union) with Austria. Yugoslavia and some other countries joined the Treaty as cosigners. Austrian borders remained unchanged as they were from St. Germain Treaty in 1920.

Organizations (ZSO) right-oriented National Council of Carinthian Slovenes (NSKS) and the newest organization Community of Slovenes (Klemenčič, Klemenčič, 2008). Styrian Slovenes are organized in an association (Association Article 7). At the regional and local level a political party Unity list (EL) has been successful. Slovene minority members were elected also to national parliament as well as to provincial assembly (Klemenčič, Klemenčič, 2010). Slovene minority additionally has some successful economic organizations and is, despite some disadvantages regionally strong and successful. Members of the minority are very successful in cultural activities.

Slovenes in Italy live on 1,500 km² in Italian Region Friuli-Venezia Giulia. The region has a special status because of its cultural diversity. In the region Slovenes and Friulians live. According to the Slovene estimates there are between 83,000 and 100,000 Slovenes who live in this region; according to official (Italian) estimates there are 52,000. About 10,000 of them live in the Friuli plain, outside the territory of the indigenous Slovene settlements. The education is organized in the framework of the Italian national education through Slovene schools. Slovene is the teaching language in these schools, while Italian is a compulsory subject. School in Špeter Slovenov/St. Pietro Natisone in s.c. Venetian Slovenia is an exception. The education there is bilingual. Slovene minority has developed rich cultural, sports and media activities which is partly supported by Italy and partly by Slovenia partially through tenders. Slovenes until 2001 enjoyed different level of protection. After 1954, Slovenes in Trieste enjoyed the highest level of protection, Slovenes in Gorizia and Udine provinces enjoyed protection to a lesser extent. Slovene minority has formed two umbrella political organization, the more left-oriented Slovene cultural and economic union (SKGZ) and right – oriented Catholic Community of Slovene Organizations (SSO). An umbrella organization means that it unites under its "umbrella" numerous cultural, sport and commercial organizations. Slovene minority has more links with leftist parties in Italy, although at regional and local level, it has its own political party "Slovene community". Ethnic Slovenes were elected to national parliament and to provincial and regional assemblies. The minority is also economically quite strong and well organized especially in Trieste and Gorizia and also at European level realizes integrative role of minorities in cross-border cooperation.

Slovenes in Hungary represents a small traditional ethnic minority in Europe. They live in the Raba region in Vas County on 100 km². According to official census data, in 2001 there were about 2500, according to Slovene estimates nearly 5,000 nationwide

(about 2,000 Slovenes live scattered throughout Hungary outside Raba Region). Raba region/Porabje is purely peripheral region with low economic advantages (Zupančič, 2000). Slovenes in Hungary have gained the first classic minority rights after the democratic changes in Hungary at the crossroads of the 1990s. Before the democratic changes took place in Hungary they were considered as a "Yugoslav" minority and the level of formal protection was very low. However, the range of these rights is still now very modest. The implementation of minority rights and economic development is hindered by the placement of the entire area populated by Slovene minority in the Órség National Park in 2001 without compensatory measures. A minority has two organizations: the Association of Slovenes in Hungary and "Slovene national minority self-government". Education comprises bilingual instruction, but the model failed, partly due to a very modest financial support by Hungarian state, small total number and reduced number of intellectuals among minority (Šiftar, 2016).

Traditional Slovene minority in Croatia is comprised only of a few hundred people. They are settled in five small and mutually separated areas along Slovene-Croatian border. The Slovene community in Croatia is much more numerous (around 20.000 of members) if we add also Slovene migrants. So most of the Slovenes in Croatia' are immigrants and their descendants who reside in major cities especially in Pula, Zagreb, which is the capital city, and Rijeka, important Croatian harbor. These cities were attractive as immigrants' destinations since the middle of the 19th century and most of Slovenes in Croatia have therefore gained relatively good economic positions as individuals. The community as a group remained practically hidden during the Yugoslav period and became visible only after Slovenia became an independent nation. They are organized in clubs. Slovenes are mentioned as a minority in Croatian Constitution; but it does not bring them practically any particular advantage (Kržišnik, Bukič, 1995).

4. The emigration of Slovenes and creation of Slovene diaspora

From late 1870s till the beginning of World War I. the mass emigration took place in most of the areas populated traditionally by Slovenes. Slovenes were than a part of enormous human stream from Europe to North America. The immigrants mainly from East-Central and Central Europe emigrated to the US in search for a better life. The US needed to settle the empty West and support the immense increase of American economy. After several decades

the US became the important economic power, thank to millions of newcomers, who brought fresh and cheap work force. In less than one generation the immigrants became Americans, people of common American culture with diverse ethnic roots. The ethnic background was not forgotten, but was not important in their daily life in the US, either. The culture, awareness and belonging remained, the language mainly not (Bodnar, 1987).

Also Slovene immigrants experienced transformation and became first American Slovenes and later Americans of Slovene descent. Slovene diaspora remained strong, relatively numerous and influential. The United States was not the only destination of the Slovenes, but remained probably the most numerous (Klemenčič, 2013).

There were many reasons for emigration; and it could not be limited to the economic reasons (in sense of seeking job or better economic position). One of the main reasons for the emigration of Slovene population was rapidly reduced income from non-agrarian activities since the mid-19th century onwards. It began to decline due to the construction of the railways which brought cheap products into the region and due to the development of the industry in the areas nearby Slovene ethnic territory. It was therefore not surprising that the Slovenes began mass emigration, both to the industrial and mining areas within the western part of the Habsburg Monarchy, particularly to the area of northern Styria and Vienna, and to industrial area in the Rhine in Germany, as well as to overseas countries. In the period before the First World War, over 150,000 Slovenes settled in the US, 40,000 to the northern areas of Styria and other industrial areas of the Habsburg Monarchy, and about 15,000 to the other areas of Western Europe. Mass migration of Slovenes took place from Slovene ethnic territory from the mid-19th century onwards. In the period before the First World War, they settled mainly in Western Europe and the USA. The number of Slovene emigrants and their descendants from this period can be estimated at around 250,000 (Klemenčič, 1995) or even higher, to 300,000 or more (Zupančič, 2001).

After the First World War, the majority of Slovene emigrants settled in Western Europe, Canada, South America. We can estimate their size in the interwar period at around 100,000 (Klemenčič, 1987; Genorio, 1989). A lot of them were simply political emigrants, escaping from radical treatments of Nazi and fascist regimes in Italy and Austria during the period between both world wars. Due to mass emigration and assimilation pressures of numerically stronger peoples, the number of Slovenes in the Slovene ethnic territory grew very slowly.

After the Second World War people migrated from Slovenia from 1945 onwards first for political reasons to the US, Canada, South America and Australia partly also to Western Europe, especially to Great Britain. They were émigré, who emigrated strictly because of political reasons. They were refugees and displaced persons. They created (particularly in Argentina) very close communities and preserved the Slovene language very well also among members of second and third generation (Genorio, 1993). Since the mid-1960s when the then Communist authorities opened the border for economic emigration as well as for tourist visits, the trend of emigration continued into all areas of Slovene emigration (Klemenčič, 1995). This trend has strengthened again with the beginning of the last economic crisis in 2008. In five years since than around 35,000 emigrated. The Slovene immigrants are organized worldwide in different forms, as for example in fraternal organizations, ethnic parishes, political organizations, cultural organizations; they have built many national homes and ethnic parishes. Naturally, they built there Slovene churches. All these forms of organizations have in modified forms, survived until the present day. Globally, it is possible to speak of at least a thousand »Slovene settlements« if the latter is referred to as part of a settlement in which at least one of the above forms of Slovene organization can be found. In the cultural field there are, inter alia, Slovene publishing houses as well as drama and choir performances (Klemenčič, 2013). Thus, it can be argued that even in exile Slovene culture in the broad sense of the word continues to this day.

5. Managing ethnic diversity: the minorities in Slovenia

Slovenia belongs to the countries with one of the highest levels of legal and real protection of indigenous ethnic minorities. The Slovene Constitution explicitly mentions two minorities, Italian and Hungarian, as well as a special Roma ethnic community. All three ethnic communities have a particular laws. Italians and Hungarians have a comprehensive set of specific minority rights throughout the existence of the independence of Slovenia, which dates from the arrangements, which were valid in the after World War II Yugoslav period. Specific laws regulate the field of bilingual topography, use of language, political participation, education, cultural and media support as well as the economy (Komac et al., 2004). Roma were given a special umbrella act of 2007. The construction of special minority rights has origins of the typical normative-legal nature based

on international treaties with Italy and Hungary and is through constitutional provisions realized in the sectorial laws. They are based in the fundamental premise of collective and territorial nature of (autochthonous) minorities. Individual areas of regulation of minority protection is adapted to the specific situations of minorities, while others are universal.

First, there is to make a brief explanation the distinction between classical or historical minorities' protection and immigrant communities. The concept of protection of minorities in Slovenia is not much different from these concepts in other European countries. The division into so called historical or traditional minorities which are explicitly mentioned in the Constitution is a typical result of diplomatic negotiations and simultaneous drawing of frontiers in which specific minority rights had a character of compensatory measures. Ethnic minorities are recognized as specific collective bodies within the nation, on a given territory. The area of autochthonous settlement is mainly a pragmatic instrument of determining the territorial scope, where specific minority rights are implemented. Members of immigrant ethnic groups, which are result of subsequent and recent migratory flows do not enjoy these special rights. They enjoy the general rights of citizenship, including the right to ethnic identification and organization and protection of their language and culture. Interpretations that these "new" minority communities (ethnic groups) are discriminated against and disadvantaged are completely inaccurate (Zupančič, 2004).

The ethnic structure of the population of today's Slovenia is the result of several centuries of historical processes. The image of today's cultural landscape was formed because of economic and spatial development, many political changes and migrations. These factors also determined its boundaries and the basic features of today's ethnic identity. Inclusion in the Habsburg monarchy strengthened position and size of German population, especially among a growing layer of civil servants, the nobility, the army, the artisans, miners and traders. Germanisation was spontaneous process of linguistic standardization in the urban and commercial environments, because German language was mostly used as language of communication by certain social classes and certainly by intellectuals. There were also quite a few migrants from German speaking territories i.e. miners in mines and serfs who were forced to migrate from one estate of the same landowner to another. As the result of these processes, some German "linguistic islands" were formed. The coastal cities in Slovene Istria were marked by unbroken tradition of ancient urban continuity from Roman times,

because of political, economic and cultural links with the Republic of Venice. The old population remained in these cities although they were constantly experiencing repopulation from the surrounding areas with the Slovene population (Božič, 1980). In addition to the above mentioned also individuals from other areas within the Habsburg monarchy were present in the Slovene area (Jews, Czechs, Hungarians, Italians, Greeks and others).

According to the last census in Austria-Hungary in 1910 the linguistic/ethnic structure on the territory of today's Republic of Slovenia was such that there lived in addition to more than 82% of Slovenes, almost 10% of Germans, 2% Italians and 1.5% Hungarians. This began to change rapidly after the collapse of the monarchy, when German and Hungarian population in the Kingdom of Yugoslavia became a minority. The number of Germans fell from the prewar 106,000 to only 42,000 in 1921 and fell again in 1931 to circa 29,000. The number of Hungarians has declined more slowly. The size of both communities have declined partly due to emigration, but even more because of the real or merely "statistical" change of identity. The number of Italians increased, because the territory of today's western Slovenia belonged to Italy. From there quite massive emigration of at least 40,000 Slovenes took place.

During the World War II 80,000 people were killed in battles as members of partisan units, in concentration camps and in post-war killings. Over 20,000 Slovenes were forced in exile. Already during the war the Italians deported around 15,000 Gottscheer Germans to the region of Posavje, from where the Germans evicted over 40,000 Slovenes. Most ethnic Germans (over 30,000) and Italians (circa 22,000) left Slovenia after World War II, due to fear of reprisals and deportations (Nečak, 1994). For a decade, Slovenia became ethnically homogenous. In 1948, Slovenes represented around 97% of the population. However, not for long. After the rapid industrialization of the 1960s, the number of immigrants from areas of the former Yugoslavia exceeded the number of Slovene emigrants. Slovenia has become an immigrant country and society, with all the characteristic features of social relations and processes. Members of various Yugoslav peoples and ethnic groups, mostly young and less qualified immigrated. They found employment in mining, metallurgy, construction, municipal activities and extensive sectors of industry (Klemenčič, 1992). The percentage of Croats, Serbs, Bosnians, Macedonians, Albanians and Montenegrins began to increase and the share of Slovenes slightly eroded (Gosar, 1993). According to the criteria of the mother tongue, the share of the Slovene population is currently around 90%. In the

Tab. 1. Slovenia's Population by ethnic affiliation in censuses in 1951, 1961, 1971, 1981 and 1991

Ethnic affiliation	1951		1961		1971		1981		1991	
	Number	%	Number	%	Number	%	Number	%	Number	%
TOTAL	1 466 425	100.00	1 591 523	100.00	1 727 137	100.00	1 891 864	100.00	1 965 986	100.00
Slovenes	1 415 448	96.52	1 522 248	95.65	1 624 029	94.03	1 712 445	90.52	1 727 018	87.84
Italians	854	0.06	3 072	0.19	3 001	0.17	2 187	0.12	3 064	0.16
Hungarians	11 019	0.75	10 498	0.66	9 785	0.57	9 496	0.50	8 503	0.43
Roma	1 663	0.12	158	0.01	977	0.06	1 435	0.08	2 293	0.12
Albanians	169	0.01	282	0.02	1 281	0.07	1 985	0.10	3 629	0.18
Austrians	289	0.02	254	0.02	278	0.02	180	0.01	199	0.01
Bulgarians	49	0.00	180	0.01	139	0.01	105	0.01	169	0.01
Czechs	807	0.06	584	0.04	445	0.03	433	0.02	323	0.02
Montenegrins	1 356	0.09	1 384	0.09	1 978	0.11	3 217	0.17	4 396	0.22
Greeks	24	0.00	50	0.00	24	0.00	18	0.00	23	0.00
Croats	17 978	1.23	31 429	1.97	42 657	2.47	55 625	2.94	54 212	2.76
Jews	15	0.00	21	0.00	72	0.00	9	0.00	37	0.00
Macedonians	640	0.04	1 009	0.06	1 613	0.09	3 288	0.17	4 432	0.22
Muslims / Bosniaks	1 617	0.11	465	0.03	3 231	0.19	13 425	0.71	26 842	1.36
Germans	1 617	0.11	732	0.05	422	0.02	380	0.02	546	0.03
Poles	275	0.02	222	0.01	194	0.01	204	0.01	204	0.01
Romanians	41	0.00	48	0.00	43	0.00	94	0.01	116	0.01
Russians	593	0.04	295	0.02	302	0.02	194	0.01	170	0.01
Ruthenians	46	0.00	384	0.02	66	0.00	54	0.00	57	0.00
Slovaks	60	0.01	71	0.00	85	0.01	144	0.01	141	0.01
Serbs	11 225	0.77	13 609	0.86	20 521	1.19	42 182	2.23	47 911	2.44
Turks	68	0.01	135	0.01	53	0.00	87	0.00	155	0.01
Ukrainians					143	0.01	192	0.01	213	0.01
Vlachs	9	0.00	6	0.00	5	0.00	17	0.00	38	0.00
Others	352	0.02	449	0.03	307	0.02	577	0.03	1 178	0.06
Undeclared					3 073	0.18	2 975	0.16	9 011	0.46
"Yugoslavs"			2 784	0.18	6 744	0.39	26 263	1.39	12 307	0.63
Regional identity					2 705	0.16	4 018	0.21	5 254	0.27
Unknown	211	0.01	1 154	0.07	2 964	0.17	10 635	0.56	53 545	2.72

Source: Verska, jezikovna..., 2003.

1990s also the number of immigrants from other non-EU and non-European countries started to increase: the Chinese, Indians, Pakistanis, Ukrainians etc. (Zupančič, 2004).

In the areas of autochthonous settlement of Slovene minorities in neighboring countries, the number of Slovenes is constantly declining primarily due to statistical and real assimilation, partly due to migration from peripheral rural and border areas. Therefore, these areas have been characterized by the appearance of spatial expansion of settlement areas and at the same time by the numerical reduction of members of minority communities

The area of autochthonous settlement of the Hungarians in Slovenia comprises 195 km². It lies along

the Slovene-Hungarian border. According to census data, in 2002, in Slovenia lived around 6,500 ethnic Hungarians; but we can estimate that the number of people who use Hungarian language reach up to 10,000. Area of settlement is peripheral, which contributes to a reduction in their number and hinders modernization (Zupančič, 2000). According to the census of 1991, there were 8503 Hungarians Slovenia, which represents a relative majority (49%) in the ethnically mixed area. Around 15% (around 1,300) of them live in other regions in Prekmurje and the rest of Slovenia, especially in major cities, because of displacement for economic reasons. There were 9,240 people with Hungarian mother tongue, who lived in Slovenia in 1981 (Zupančič, 2002).

The Italian minority lives in the coastal areas of Slovene Istria on 27 km². According to the ethnic affiliation of the census of 2002, 2,700 ethnic Italians lives there. According to the criteria of the mother tongue about 3,400 Italians lives in Slovenia; estimates show circa 4000 members of Italian minority. According to the 1991 census, there lived 2575 people who claim Italian as their ethnic affiliation and 4009 by mother tongue. The area of settlement is vital and economically active; minority is also locally in the minority. The Slovene-Yugoslav- Italian border since the Treaty of Ossimo [1976] onwards is very open, which made it easier for minority to communicate with its Italian ethnic origin hinterland (Zupančič, Pipan, 2012).

Members of Roma community are autochthonous ethnic community, present in Slovenia for at least 500 years. Roma are not settled on a contiguous territory, but are in the majority in over 100 settlements. According to the 2002 census there were around 3,600 and in 1991 2,293 Roma according to the ethnic affiliation criteria and 2,847 according to the criteria of the mother tongue. According to estimates by social services around 8,000 Roma live in Slovenia, scholars estimate their total number at 10,000 (Zupančič, 2014). Minority protection has due to the poor economic situation of these communities mostly character of social interventionism, rather than keeping the ethnic and cultural nature of the population.

In accordance with Slovene Constitution, representatives of Italians and Hungarians have secured a permanent (virile) mandate in the Slovene Parliament. Deputies have the same powers as the other MPs, additionally they have the right to use their own language and the right of veto in matters that directly affect the rights of minorities. They are elected at the regular election in a special minority electoral roll. Members of minorities are included in this roll with the statement that they belong to a minority community. Members of minorities can vote for minority candidates and also for the candidates of political parties; thus they have double voting rights. The same is true at the level of local elections. Roma do not have their representatives in the national parliament, but they have the right to elect their own representatives or municipal councilors in the municipalities where they are traditionally present. In addition, all three minorities have their own umbrella organizations, which play roles of coordinative bodies. For the level of political and cultural rights, and issues the Office for National Minorities in the Slovene Government is responsible.

Another area of protection of minorities is bilingualism. Slovenia is consistently pursuing a policy

of bilingualism visible in the topography of settlements, streets and official institutions, which must be bilingual in the areas of minority settlements. Officials must master at least the basics of both languages at the local level in the area of autochthonous settlement. Officials with knowledge of the minority language are financially stimulated. Persons belonging to minorities have the right to a translator in litigation on the entire territory of Slovenia and have the right to communication with authorities in their own language. This also includes the right to a name and last name in the language and script of the minority. In the area of autochthonous settlement all, irrespective of ethnicity have bilingual identity documents: identity cards, passports, documents of origin, the various permits and certificates. Bilingualism is also possible in courts; if the client is a member of a minority and wants to do business in their own language. Written decisions and other documents are always bilingual, regardless of the language in which the proceedings take place. Bilingual operations are legally guaranteed in the procedures of the municipal authorities and the authorities of the municipal and local committees. Documents (statutes, regulations, rules, etc.) in the municipalities are in both languages. Minority languages are used also in the church, although this is not guaranteed by the state. Bilingualism in the Catholic and Protestant churches in Slovenia is consistently implemented, even among priests and pastors who are not members of the Italian or Hungarian community (Komac et al., 1999).

Education is the second most important socializing environment in the life of minorities; the first being family. Minority schools have a threefold purpose: to provide members of minority sufficiently general and professional knowledge of education in their own language and knowledge of the culture, history and geography of their own ethnic group, to form appropriate values and to assert the values of tolerance and accept differences in the ethnically mixed area. In Slovenia, due to peculiarities of historical development and circumstances two entirely different systems of minority education were established: Italian schools in Slovene Istria and bilingual schools in Prekmurje on the Slovene – Hungarian border. This education is part of a single Slovene state school system. In public schools located in the area of autochthonous settlement of minorities, in all educational institutions all pupils have to learn the minority language. In the Italian kindergartens, elementary and secondary schools where teaching takes place in Italian, pupils are also required to learn Slovene. Also, all communication with parents of school children is conducted in Italian in these schools. In total,

in Slovenia there are nine Italian primary and three secondary schools. Italian language and literature can be studied in Ljubljana Faculty of Arts (there they also train teachers for the Italian minority schools). For the needs of the Hungarian minority a system of bilingual education was developed, where classes simultaneously take place in Slovene and Hungarian. In the ethnically mixed areas there are 11 kindergartens, five elementary schools and one bilingual secondary school. At the university level Hungarian is taught at the University of Ljubljana and Maribor, where they train teachers and educators for bilingual schools. Mutual recognition of school diplomas at all levels among Slovenia, Italy and Hungary is regulated by separate agreements.

In the field of information and media the regulation of minority rights are of threefold nature:

- the right of the members of minorities to establish their own media image of themselves and the spread of information about themselves;
- the right to the presence of minority issues in the public media, and
- to ensure a smooth flow of information between the minority and the country of origin.

The Italian community in doing so has due to the characteristics of the territory a few advantages. In the context of the national radio and television, radio and television programs in Italian language are aired virtually all day and they have a seat in Koper. The Italian community in Slovene Istria has at its disposal a range of programs, magazines and newspapers from Italy. Media of Hungarian minority is much poorer. It has available the weekly newspaper, cultural magazine, radio station in Lendava and the emission on national TV twice a week. A special program council of Radio Television of Slovenia – public – national broadcaster, in which the minorities have their representatives, governs the content of the program, for both of the minorities. Roma community has several emissions in public radio and short magazine.

Cultural heritage of minorities, its preservation and development is included in the common heritage of the Slovene state. Hungarian community has established "Institute for Culture of Hungarian nationality", which includes the activities of civil society with predominantly folklore attitude to literature. In Lendava and Murska Sobota, the rich libraries in the Hungarian language exists. Cultural activity of Italians is organized in six associations. Important institutions with their seat in Croatia are also available for Italians of Slovenia: the Centre for Historical Research in Rovinj and the Italian Theatre in Rijeka, Slovenia allocates certain funds for the activities of both institutions (Zupančič, 2014).

6. Conclusion

Slovenes are relatively small European people, which live in contact with others in Central Europe and the Mediterranean. Due to historical circumstances, they achieved statehood relatively late. Traditional ethnic minorities in Slovenia and Slovene minorities in neighboring countries are a result of turbulent processes of border-making through a bit more than last century, when the recent political map of Europe has been made. Due to the intense emigration of a century ago, and later a relatively large Slovene diaspora in North America, Australia, Argentina and the countries of Western and Central Europe was developed. Immigrant communities from the former Yugoslavia in Slovenia are a result of recent migrations. Colorful ethnic heritage is difficult to manage, but is also culturally rich. Future cultural development and ethnic existence of Slovenes is dependent on both the skills of implementing new socioeconomic paradigm, consistent with the processes in Europe, as well as the conscious efforts of the existence of the Slovenian language and culture, in the sense of defiance global tendencies universalization of the one and migratory flows, on the other hand.

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SOCIAL PROTECTION OF ATO PARTICIPANTS AND MEMBERS OF THEIR FAMILIES IN MODERN CONDITIONS OF DEVELOPMENT RISKS OF UKRAINE

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Abstract

In this article we analyze the unfavorable demographic, social, economic situation, which has been forming for 20 years in Ukraine and now is burdened with military actions. That's provoking increasing a number of people, who having received disabilities and, as a result, need versatile rehabilitation. The state takes care of its defenders and their families. Defined at this article risks, unfortunately, impede rehabilitation, resettlement and reintegration of those who participated Anti-Terrorist Operation and members and their families.

Key words

public health, socio-economic situation in Ukraine, Anti-Terrorist Operation, the participants of the Anti-Terrorist Operation, social protection.

1. Introduction

Ukraine gradually moves to development firstly as an independent, sovereign, strong, respected by the world community state and as a competitive, prosperous, self-sufficient member of the European Community; and secondly as democratic with formed civil society, social and legal state, country of health and welfare.

Complicated social transformations associated with preservation of the integrity and sovereignty of Ukraine, burdened by a number of today's geopolitical antagonism, internal and external challenges, such as opposition to separatism with the formation

of the national unity resulting in "Anti-Terrorist Operation" (hereinafter – ATO).

The transformation processes in Ukraine related to long, lasting and sporadic, multifaceted political and economic transformation of systems providing the country functioning and livelihoods of people today still relate to the need of drastic changes in organization, management, financing etc. It significantly negatively impacts, primarily the social sector, causing increased social differentiation of population and decline in quality of life, reduction in social protection and confidence in the future of the

citizens, physically and mentally complicating their livelihoods. Thus, the priority tasks are building and improvement of medical and social support towards the establishment of such a system that would meet modern world standards and ensure promising future to the population of Ukraine.

Thousands of Ukrainian mobilized soldiers and volunteers protecting the territorial integrity and independence of the homeland, during the last year had to practice military skills, look into the eyes of war due to ATO in the east. Nowadays reality stipulated by increasing role and value of management factors, the need for new forms, methods and techniques of organization and management lead to formation of new scientific modern mechanisms of state control for regulation of social relations in this sphere: including ATO procedure, regulation of ATO participants status, creation of perfect and efficient system directed to preventive medical and welfare improvement of health of the ATO participants and members and their families. The absence of multifaceted, complex, interdisciplinary, scientific and analytical researches on the medical and social security of ATO participants and members of their families with option of effective ways, methods and procedure for solving certain scientific and practical problems that would show the feasibility and ways of implementing qualitative changes in public administration led to the topicality of this article.

At the meeting of WHO Regional Office for Europe in 2009 "Health in times of global economic crisis: Implications for the WHO European Region" (1–2.04, Oslo, Norway) it was highlighted that the current global crisis is a serious global threat to health systems, social security and public health in general, because in continues at the background of global environmental and energy issues and profound demographic changes that in modern Ukraine are complicated with hostilities of ATO.

It is universally recognized that the socio-economic situation in a country determines the state of public health. Thus, lower incomes during the crisis lead to a feeling of uncertainty in the future, which

inevitably causes negative changes in health status and increasing needs of the population in medical and social protection while the state is unable to satisfy it fully.

On the other hand, it is common that deterioration of public health is a prerequisite for deeper irreversible effects of socio-economic and spiritual development of the Ukrainian nation, the real threat to Ukraine's national interests. Unhealthy nation cannot at full strength resist negative external and internal (social, economic, socio-political, environmental) factors to solve complex problems in order to overcome the crisis.

Therefore, it is necessary to identify, evaluate existing and potential risks and ways to minimize or eliminate their negative impact. Implementing anti-crisis measures, to adopt effective appropriate decisions to complete the transformation processes and future development.

2. Problems and risks of health care and social spheres

For the last 15 years, unfortunately, in Ukraine the demographic situation, accumulating influence of a wide range of factors (transient and long term, related to the specific socio-historical development caused by modern social changes) is characterized by a decrease in the total population, reduction in life expectancy for both men and women; decrease in birth rate, increase of death rate, lack of natural growth; aging of population with increased "load" for working persons, deformation of gender and age structure by predominant death rate of men; increase sanitary-epidemiological problems at risk of outbreaks and dissemination of infectious diseases, worsening the situation of tuberculosis and HIV; significant deterioration in the health of the nation with increased premature mortality and so on (tab. 1.) (Лібанова, Курило, 2012; Рингач, 2014).

The problems and risks of health care also include reducing the availability, quality and effectiveness of

Tab. 1. Demographic indicators in Ukraine for the last 5 years

	2010	2011	2012	2013	2014
Total population [millions of persons]	45,778.5	45,633.6	45,533.0	45,426.2	42,928.9
Rate of natural increase, population decline [thousands of persons]	-200.5	-162.0	-142.4	-158.7	-144.2
Number of births [thousands of persons]	497.7	502.6	520.7	503.7	465.9
Number of deaths [thousands of persons]	698.2	664.6	663.1	662.4	632.7
Migration increase, population decline [%]	16.1	17.1	61.8	31.9	22.5

Source: Data of the official website of the State Statistics Service of Ukraine (Дані офіційного сайту Державної служби статистики України).

medical care (prevention, treatment, supervision) at all levels and medications support, medicines, which come amid a surge of quantity, change of need for medical and social care and growth in the number of contingent in need for state care; difficulty of healthy lifestyle.

Decreasing the number and reducing health state of Ukrainians, migration outflow of young, active and rich segments of the population automatically lead to deterioration of the country's labor potential competitiveness.

Among worsening economic risks in Ukraine are chronic budget deficit, devaluation of the hryvnia, reduce of real value of the allocated funds, respectively, the country's inability to ensure implementation of the adopted social programs and activities during growth and modernization of social needs, corruption; loss of income by the most people etc.

The economic risks were enlarged by necessity of warfare in eastern Ukraine, going beyond the destroyed region, formed a chain of economic losses of the country: numerous enterprises, commodity markets and jobs which, in turn, increase unemployment, decrease budget revenues and social insurance funds, thus the capacity of the state to provide social programs and activities of medical and social sphere.

Repeated increase in funding the military sphere and restore of destroyed infrastructure also turn into increase of budget expenditures.

Risks and effects of social issues are related to the loss of housing, livelihood due to large-scale displacement of people from temporarily occupied (so called „gray zone“) and located close to the boundary territories, which remain industrial desert and reduce the chances of reintegration of the local population.

Fall in living standards combined with fear for life (own, children`s, relatives`) increase migration, particularly people are fleeing with intention to change the country forever – this is the risk-effect that will influence the development prospects of the country for many years - massive exodus of active employable people produces direct loss of labor and reproductive, intellectual potential – Ukrainians will work in other countries, spend their money, and have children there.

The spread of unemployment, growth of traditional risk groups and the emergence of new risk groups – victims of social conflicts and refugees – provoke increasing of social tension in Ukrainian society, large scale of social exclusion, marginalization and polarization of the population. The issue of increasing the number of children who receive no

education requires special attention – it is a potential threat for rising crime.

In Ukraine there is a high degree of deterioration in the quality and accessibility of different population groups to social activities (including education and health care), social and economic inequality, including gender and territorial.

Socio-legal problems, which Ukrainians frequently face, are related to the protection of social and economic rights, including receiving the state financial assistance, because today Ukraine is a country of privileges, subsidies and grants: from social protection for poor families, pensions, aid to unemployment subsidies for utilities; child benefits (childbirth assistance, child care, single mothers) to the important issues related to the participation of the citizens in ATO (guarantees during mobilization, the status of combat veteran, compensation in case of injury or death, treatment of wounded, prosthetics). Also matters about housing of families of the soldiers who died in ATO are important for the ATO participants and their families.

The most important thing today in different regions of Ukraine is the problem of social protection of migrants (status of migrant, restore of lost documents, registration, targeted assistance for employable and disabled family members, dismissal and employment). As of February 1, 2016, according to the data of social protection structural units there were registered almost 1,705,000 persons or 1,346,276 families from Donbass and the Crimea.

Also, social risk-effects include uncontrollable territories of Ukraine, full of weapons complicated criminal situation, increasing manifestations of separatism, banditry and threats of terrorist acts that inevitably spread to remote territory from warfare areas.

Sharp political confrontation, bloodshed increase aggression in society; set up illegitimate methods for disputes and conflicts resolution; lead to usage of force and weapons. There appears a need for fast and simple solutions – the threat of criminalization and dehumanization of society in general, when emotions, accusations and revenge come to the fore; intolerance, values split, atomization of society are catalyzed.

Events in the east, ATO caused except economic and social very important psychological impact on Ukrainian society – the war has generated a number of challenges and threats to socio-psychological nature.

Prolonged existence of the population in state of acute and chronic stress is provoked and/or enhanced by common socio-economic problems of life in Ukraine and ATO. This will have social

risks-effects – increase in number of patients with mental disorders (post-traumatic syndrome, psychosomatic disorders) and behavior (socially dangerous and suicidal). It has been dozens of suicides of ATO participants returning home, including healthcare workers. According to the Ministry of Defense 171 Ukrainian soldiers committed a suicide in 2014, but it is believed that the real number is much higher. Alcoholism and drug addiction are major problems today among Ukrainian demobilized soldiers.

Continuous military operations and constant increase in a number of their participants (currently there are more than 124,000 soldiers, who has combat veteran status) create implications, risks-effects of post-war syndrome, resocialization of demobilized soldiers and their families. Socio-psychological risks-effects are complicated with inadequate personnel support from state managers to sociologists, physicians, psychologists.

However, there have been positive changes of socio-psychological situation in Ukraine, manifested in the acceleration of integration of Ukrainian political nation, society has united for the idea of building an independent sovereign state; enhanced social connections - social capital is gradually increasing, particularly through the establishment of a new system of contacts between total strangers.

The awareness and the desire to avoid public danger led to the formation of active mass volunteer movement – a bright manifestation of strengthening civil society, growth of its social role and new alternative informational system, formation and use of which involves Ukrainians, especially young and middle aged – as a sign of democracy.

3. Some aspects of the social protection for ATO participants

Today Ukraine has a system of social protection at three levels: national (Presidential Administration of Ukraine, the Cabinet of Ministers of Ukraine, Verkhovna Rada (Supreme Council) of Ukraine, ministries and departments, courts), regional (regional administrations, regional councils, departmental territorial bodies), local (district administrations, district councils, departmental territorial authorities, enterprises, institutions and organizations).

The bodies and institutions that provide social protection for ATO participants coordinated by the Ministry of Social Policy, are:

- State Services of Ukraine for war veterans and members of the Antiterrorist Operation, services on Labour, Employment and Pension Fund of Ukraine;

- Territorial social security agencies (total of 696 – structural subdivisions: 25 regional departments, one city department in Kyiv, 670 district offices);
- The network of social services for families, children and youth (total of 692 centers, 25 regional, 464 district and 138 local, 31 district-city, 34 village);
- Services for Children (total of 695 services, 24 regional, 464 district and 143 local, 60 district in towns, 3 city);
- Centers of Vocational Rehabilitation for Disabled (total of 10 centers, with the ability to provide rehabilitation services to about 1.6 thousand people with disabilities);
- Specialized resort facilities (total of 4 sanatoriums: “Peremoga” (Kyiv), “Batkivshchyna” (Truskavets), “Slava” (Myrgorod), “Salut” (Odessa));
- Children’s Center State Enterprise “Moloda Hvardiia”;
- Fund of Social Protection for Disabled;
- State experimental prosthetic and orthopedic enterprises (12 state enterprises and 70 - private);
- Ukrainian Scientific-Research Institute of Prosthetics and Rehabilitation.

As indicated above, more than 124 000 of Ukrainian citizens – ATO participants have received combat veteran status, so state social protection system now conducts 6 programs for social protection of ATO participants and members of their families:

With regard to obtaining combat veteran status. At first the Interdepartmental Commission on granting combat veteran status was established. Today, combat veteran status is given under simplified procedure by departmental committees dealing with these issues.

With regard to resort treatment. 3,700 tickets for ATO participants were purchased; more than 200 people were made healthier under this program in summer.

With regard to housing of ATO participants. Close fruitful cooperation of social security bodies and local authorities is being conducted. More than 10 million UAH were transferred for housing of 25 ATO participants; another 10 million UAH are planned for purchase of housing for 19 ATO participants. 64 million UAH were allocated from budget for housing to those who lost functionality of the lower extremities during ATO.

With regard to prosthesis. 120 ATO victims got prostheses, four injured soldiers received biological and myoelectric prostheses abroad (cost from 30 to 45 thousand euros). Each ATO participant who needs high-tech prosthetics, not available in Ukraine, by the decision of departmental commission can count on aid (over 2 million UAH). People who need

prosthetics or provision of technical means of rehabilitation are monitored. Currently, nine soldiers prepare for prosthesis under this program. It is important that professionals work abroad to open in Ukraine service center for imported prostheses.

With regard to psychological assistance. Psychological support is provided to ATO participants by experts of both small and large medical institutions (there are 20 hospitals, 29 hospital departments - in total, more than 6.5 thousand beds) and private entities. 50 million UAH were allocated for the program of psychological rehabilitation of ATO participants from the state budget. As of August 1, 2015 psychological support and rehabilitation were provided to about 20 thousand families of ATO participants.

With regard to social and professional adaptation of ATO participants. The state provides 27 million UAH for social security program. Retrain and second specialty groups are being formed with the help of NGOs and volunteers. It will help ATO participants to adapt to new conditions.

Of course, all the problems of people who until recently were carrying out military service in eastern Ukraine these six programs cannot solve. There is a lot of questions, a lot of conflicts, sometimes they require innovative solutions. For this purpose new modern mechanisms of public influence are in process.

This issue is under ongoing debate among experts, managers and scientists. Personnel is taught, qualification of specialists such as management specialists, social and medical workers military psychologists is increased.

Social protection for ATO participants and members of their families is carried out by State Employment Service. Pursuant to Presidential Decree No 150/2015 of 18.03.2015 "On additional measures for social protection of Anti-Terrorist Operation participants" [Про додаткові заходи щодо соціального захисту учасників антитерористичної операції], Order of the Cabinet of Ministers of Ukraine of 31.03.2015 No 359-p "On Approval of action plan for medical, psychological, vocational rehabilitation and social adaptation of Anti-terrorist Operation participants" [Про затвердження плану заходів щодо медичної, психологічної, професійної реабілітації та соціальної адаптації учасників антитерористичної операції] and Order of the Cabinet of Ministers of Ukraine of 13.01.2016 No 10-p "On approval of Interagency Action Plan for Adaptation to Civilian Life of Anti-Terrorist Operation participants" [Про затвердження плану міжвідомчих заходів з адаптації до мирного життя учасників антитерористичної операції] in order to promote employment and social integration of Anti-Terrorist Operation participants, State Employment Service

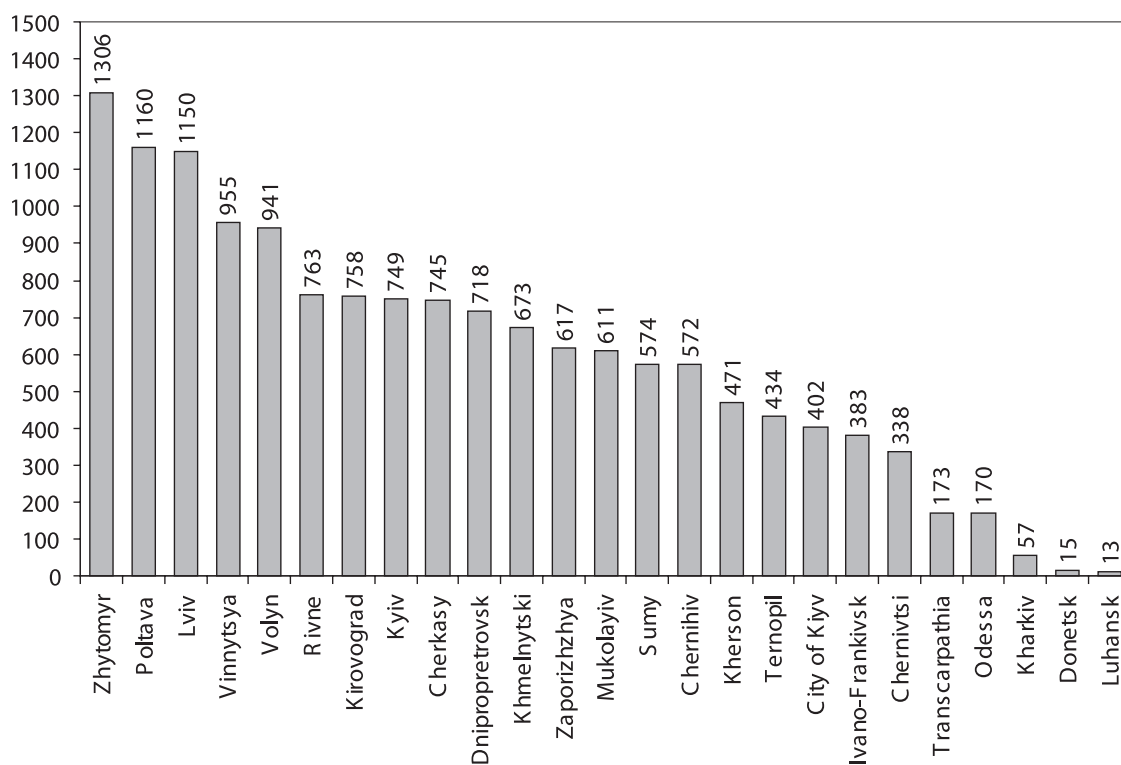


Fig. 1. The number of people receiving assistance from State Employment among ATO participants in different regions of Ukraine as 31.12.2015

Source: Data of the official website of the Ministry of Social Policy of Ukraine (Дані офіційного сайту Міністерства соціальної політики України)

ensures full range of social services, including employment, vocational guidance and training, etc.

Since 2015, 21,100 unemployed among ATO participants took advantage of State Employment Service, more than 700 of them have disabilities. 20 200 persons received unemployment benefits. 4 000 persons, including 78 people from among the disabled got work. The age structure of the unemployed among the soldiers who took part in ATO is as follows: every tenth person is 15–24 years old, over 19% are from 25 to 29, one in five is 30–34, 38% are persons of 35–44, 12% are persons of over 45, including 1% of over 55. Division of unemployed by education among the soldiers who took part in ATO is as follows: people with vocational education represent almost 50%; people with higher education – 27%, primary and secondary education – 26% (<http://www.dcz.gov.ua/statdatacatalog/document?id=393494>).

In 2015, half of the unemployed soldiers among ATO participants were employed at positions of legislators, senior civil servants and managers, each one of six at worker position, 7.4% at elementary occupations and 6.6% at positions in trade and services. 1,500 ATO participants started their own business at the expense of one-time payment of unemployment benefit since 2015 (Офіційний сайт Міністерства соціальної політики України).

Since early 2015, more than 2 200 ATO demobilized participants were trained at the advice of State Employment Service. Thus, at the end of 2015, 14 700 persons had unemployed status (decrease of 6,400 people – 30% for a year); unemployed among ATO participants, of which 14,000 received unemployment benefit (30% less than at the beginning of the year). In January-February 2016, 16,500 unemployed ATO participants took advantage of State Employment Service. 15,900 people received unemployment benefit. 1 000 persons got a job, including 968 persons, who were employed at the advice of State Employment Service. 325 of them received one-time payment of unemployment benefit for organization of own business. 870 unemployed among ATO participants underwent vocational training. 359 such persons were involved in public and other temporary works (Кондратенко, 2015).

Figure 1 shows the number of people receiving assistance from State Employment Service, among ATO participants as of 31.12.2015 in different regions of Ukraine.

4. Summary

Ukraine faced with resolving the issues of further development with the formation of national unity,

preserving the integrity and sovereignty, which is burdened with a number of today's geopolitical antagonism, external and internal risks, including opposition to separatism and conduction of ATO.

Negative demographic dynamic described herein above, burdened by deterioration of health, economic and social welfare as a result of long-term sporadic maintenance, chaotic changing vectors of implementation and incompleteness of reform processes in country's functioning.

Unfavorable demographic, social, economic situation, which has been forming for 20 years is burdened with military actions in the area of ATO, provoking increasing a number of people, who need versatile rehabilitation, having received disabilities, especially considering the fact that 70% of them are people of working age. An important fact is increasing a number of family members of ATO participants, those who doomed to limited opportunities for quality development over the next decades.

Solving the issue of adequate medical and social security for ATO participants and members of their families is an important duty of the state. In 2016 systems of medical, social and psychological care for this category of people are being developed and started to work efficiently in Ukraine. But only a few areas of theory and practice are developed today, rehabilitation activities and institutions are being elaborated, but a proper level has not yet been reached which is determined firstly by lack of experience, and secondly by lack of relevant capabilities.

Thus, the state takes care of its defenders and their families, but there is still a need for optimal variant of complex multi-stage rehabilitation and competent scientific approach to the governance of medical and socio-psychological support of ATO participants and members of their families.

Despite general awareness of the importance of integrated rehabilitation, recovery and return to normal life of soldiers; support to their families, there are still no clearly defined common methodological approaches to medical, vocational and social rehabilitation, no complete national system for comprehensive medical and social rehabilitation for this group of people. Therefore, further researches and development are very important for the theory and practice of public administration in particular and development in general.

Solution to these complex risk issues described herein is an important task of government and nowadays, in our opinion, lie in securement of adequate living conditions and productive life of society as a whole and each individual in particular.

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„INNOVATIVE IDENTITIES“? THE ISSUE OF CULTURAL AND LINGUISTIC FRAGMENTATION IN MONTAGNA FRIULANA (NORTH EASTERN ITALY)

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Abstract

The current globalization reality is characterized by the constant coming up of new identities, that are appearing at any scale, almost as a side-effect of parallel phenomena signifying increasingly cultural indeterminateness. This paper argues that this phenomenon is connected to a condition of periphericity, namely to a sense of vulnerability that arise outside the umbrella once provided by modern state; furthermore this paper argues that this phenomenon is indifferently affecting any culture, not considering ethnic and linguistic derivation. Such situation figures out a sort of paradox of the globalization, which, while extending the hegemony of a uniform code, would induce per reaction the flourishing of local cultures, sometimes evidencing a self-referential character, other times configuring the main stain for a new territorial consciousness.

Key words

Region Friuli Venetia Giulia – North Eastern Italy, local identity revival, geography of peripheral condition, Eastern Alps, ethnic and linguistic minorities.

1. Introduction

The sometimes insisting sprout out of new identities is characterizing the current globalization reality; they appear at any scale, from the micro to the macro, almost as a side-effect of parallel phenomena signifying increasingly identity (cultural) and territorial indeterminateness (Herb, Kaplan (eds.), 1999; Wintersteiner et al., (eds.), 2010; Jelen, 2011; Ilieş et al., 2012).

This paper argues that this phenomenon could be connected to a condition of periphericity, in which some communities unexpectedly find their selves in the new global map (which is in the same time upsetting the usual centre-periphery schema), namely from a sense of vulnerability, outside the umbrella once provided by modern state – that in

the same time is losing in charismatic and material power.

Further elements can be individuated in a post modern phenomenon of revival of local cultures, obliterated in modernistic times by the centralization wave, and in the increasing weakness of modern institutions. These are accumulated problems (public debt, bureaucracy, political inefficiency), evidencing the incapability to accomplish longer their duty both, as provider of social services (safety, welfare, accessibility, pluralistic education) and as reference for an all-comprehensive identity in national terms; a problem common to many contemporary political systems, which is described by the rhetoric of the "end of cycle" of (western) democracy.

As a further element to be considered the reaction to a situation of uniformation induced by multiculturalism, with the "mixed" category becoming the most rapidly growing ethnic category in the global era (namely the fear for the disappearing of an usual idea of identity) (Ali, 2011). Another relevant aspect would be the establishment of a condition of borderless, repurposing the fear for competition of outside economies, namely the loss of some rent position; in the case of the Montagna Friulana (MF, see fig. 1)¹ it means the fear to be exposed to the more efficient "north" and the fast growing "east" in the Central-European scenario (borderland effect).

Further elements would be possible traced to a kind of marketing tactic, the peripheral communities would adopt for making their selves something distinguishable in the "flat" global scenario. This not just for touristic-economic purposes, but also for the possibility of obtaining a share of the public budget usually devoted to protection of environmental and cultural particularities (a usual task for the modernist welfare state). Such possibility indeed induces expectations (in terms of public funding, of promotion etc.), then configuring the risk for bringing to some artificial survival of the publicly-funded identity, with local lobbies advocating a minority status, in fact becoming a kind of minority "professionals" (then configuring a dangerous cultural bias).

Such situation figures out a sort of paradox of the globalization, which, while extending the hegemony of a uniform code, would induce per reaction the flourishing of a mix of local cultures, sometimes evidencing a self-referential character, other

times configuring the main stain for a new territorial consciousness.

2. The condition of periphericity: opportunity or condemnation?

Such perceptions are strongly influenced by the post-modernity "turn", which means amongst the others the upset of the perception of the territorial order, namely the inversion of centre-periphery disposition. It is a matter of geographical consciousness, about the position a certain group perceives to settle with regard to all the "others" and to other territorial and non-territorial factors; it depends probably on cultural or historical circumstances, which would determine the self-perception of a certain community in terms of being inside or outside (protagonist or victim) of certain context (Steinicke et al., 2011a, 2011b).

In some case, a condition of periphericity could be perceived as an advantage, in others as a definitive disadvantage; in the range of few km the perception of a certain identity could manifest in opposite significances. This issue is evidently correlated to the identification of the "self" in a "whole", what in regional-structural terms means the perception of being included or excluded from something: perhaps it could signify perhaps the level of social collaboration (e.g. functioning of the civil functions), the availability of infrastructures, the connection to "centers" (state, regional, "global" etc.) and the accessibility to wider flows, depending on geographical hierarchy (Chai et al., 1986).

The fact, that in a context of structural weakening the local emarginated group would tendentially perceive the outside world in a negative way is possibly more than an hypothesis: it would be probably affected by intestine conflicts, manifesting in different way the discomfort and the impossibility of maintaining a rational way of confrontation both, inside the community (among community members) and towards the outside institutions.

This until the society will reach a new equilibrium or, at the contrary, until it will definitively weak, with peoples maturing a sense of miss-trust, eventually a sense of self-hatred, risking the definitive desegregation. Probably a situation characterized probably by the spread out of instinctive reactions, that are going to characterize both, inside and outside relations, with the outside world being perceived from a condition of inferiority, as well as the local community were a kind of residuum left behind by the mainstream of geography and history.

¹ For making the reading easier, it has been used in the text the official toponomastic in Italian, followed eventually by locally used names either Friulian-Italian, Slovenian or German; see the institutional webpage of the region Friuli Venetia Giulia <http://www.regione.fvg.it/rafvfg/cms/RAFVG/cultura-sport/patrimonio-culturale/comunita-linguistiche/> [11.11.2016].

Such motivations manifest in not predictable ways and in not coherent communication modes. Sometimes the group, perceiving itself as threatened, would react in an instinctive manner, like an "organic" being, with a whole personality defending his self in a lethal struggle for survival – since in those circumstances the rational confrontation codes are not working anymore. Sometimes it would just desegregate and disappear (as e.g. a community demographically weakening and migrating).

In such circumstances, single individuals, factions and groups, association and institutions, feeling limited and menaced (in a kind of "territorial trap"), would probably react as endangered "animals", for pure self-defense purposes, migrating or hiding their selves, fighting or escaping the reality. Yet they have as well the chance to positively react, elaborating compromises, starting initiatives and elaborating intermediate (innovative) identities. Evidently, social actors and settlement units, as well as economic or political organizations, are not behaving just like "atoms" in an invariable mechanically-determined game, which is just further "replicating".

3. The case of the mountain area of Friuli

Such situations have been well defined in literature in the post-mod culture frame (supposed to evaporate or to become "liquid"); the same for the case of the alpine rural geography in different circumstances, both, in "critical" and descriptive-quantitative terms (Appadurai, 2001; Rumley, Minghi (eds.), 1991; Kaplan, Häkli (eds.), 2002; Weixlbaumer, 1988).

Indeed in mountain space – as well as in other spaces characterized by remoteness, natural topographic obstacles, and territorial discontinuities – such condition of periphericity is perceived alternatively as a problem or as an opportunity. Probably this considering the expectations the community manifests to become dependent of some "centre", considering as well further local attitudes (as autonomy tradition or social compactness), as well structural accessibility, availability of infrastructures and economic self-sufficiency.

In order to test such connection we would consider the MF, an area comprehensive of the northern and the eastern part of the province of Udine

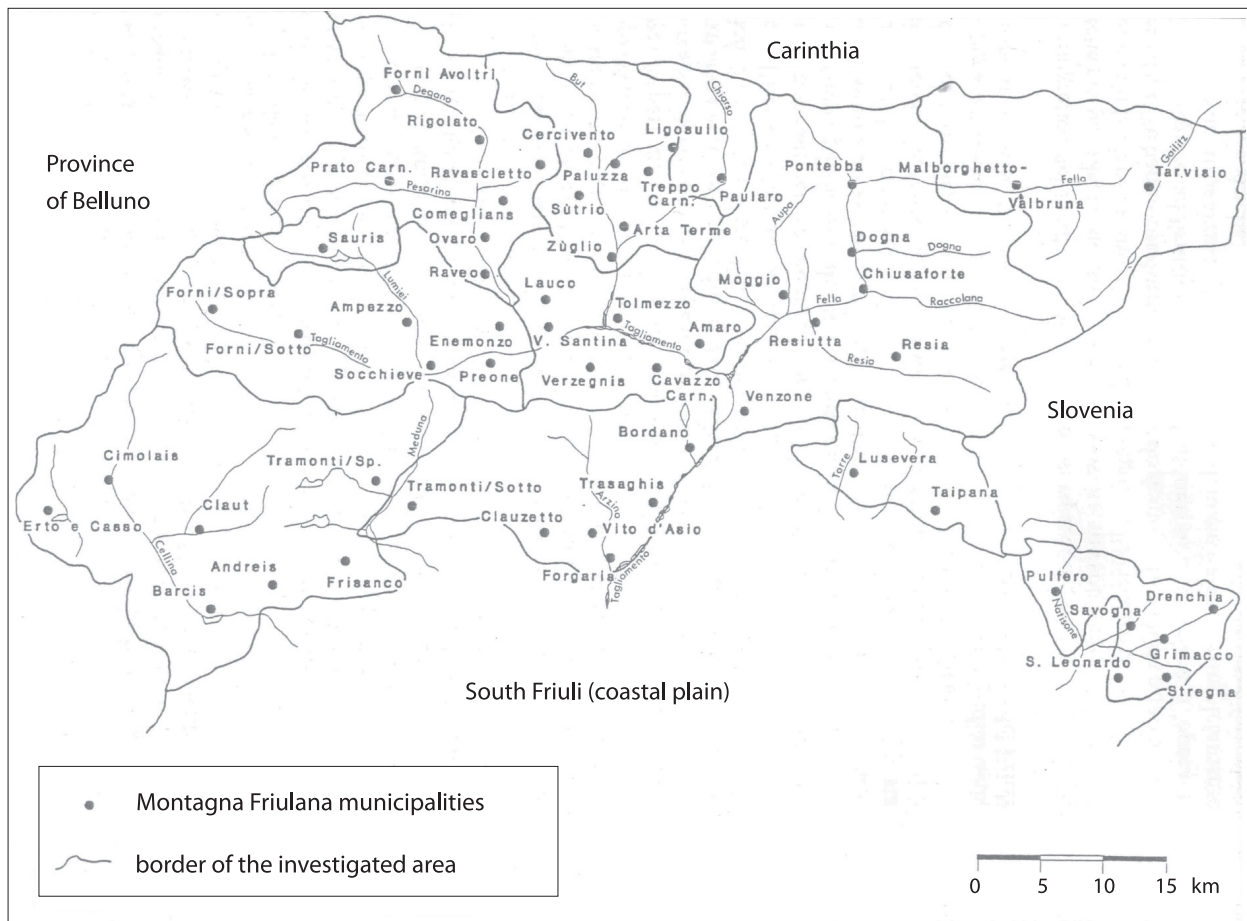


Fig. 1. The Montagna Friulana as per E. Steinicke, comprehended in the administrative provinces of Udine and Pordenone, in the northern part of the FVG region, north-eastern Italy

Source: Own elaboration based on Steinicke (1991, p. 40).

Tab.1. Population and demographic trend in the municipalities of the Montagna Friulana

municipalities and sub regions	resident population		% (1951 =100%)	municipalities and sub regions	resident population		% (1951 =100%)
	1951	2011			1951	2011	
Arta Terme	3208	2273	-29	Chiusaforte	2187	705	-68
Cercivento	1220	705	-42	Dogna	987	200	-80
Ligosullo	432	180	-58	Moggio Udinese	3854	1842	-52
Paluzza	4271	2403	-44	Pontebba	3931	1535	-61
Sutrio	1758	1376	-22	Resia	3350	1101	-67
Treppo Carnico	1409	659	-53	Resiutta	798	320	-60
Zuglio	1150	607	-47	Venzone	3592	2223	-38
Canale S.Pietro	13448	8203	-39	Canal del Ferro	18699	7926	-58
Paularo	4408	2782	-37	Lusevera	2377	711	-70
Comeglians	1839	540	-71	Taipana	2841	699	-75
Forni Avoltri	1508	653	-57	Prealpi Giulie nord (Torre)	5218	1410	-73
Ovaro	3935	2064	-48	Drenchia	1392	141	-90
Prato Carnico	2538	958	-62	Grimacco	1737	395	-77
Ravascletto	1500	569	-62	Pulfero	3735	1052	-72
Raveo	739	506	-32	San Leonardo	2283	1210	-47
Rigolato	2058	513	-75	Savogna	2077	506	-76
Canale di Gorto	14117	5803	-59	Stregna	1883	413	-78
Ampezzo	2472	1058	-57	Prealpi Giulie sud (Natisone)	13107	3717	-72
Enemonzo	1846	1355	-27	Bordano	1483	810	-45
Forni di Sopra	2070	1071	-48	Clauzetto	1840	402	-78
Forni di Sotto	1598	660	-59	Forgaria del Friuli	3202	1854	-42
Preone	655	279	-57	Tramonti di Sotto	1952	423	-78
Socchieve	2253	938	-58	Trasaghis	4125	2337	-43
Alto Tagliamento	10894	5361	-51	Vito d'Asio	2939	843	-71
Sauris	885	429	-52	Prealpi Carniche - Ovest	15541	6669	-57
Amaro	1199	820	-32	Andreis	1125	289	-74
Cavazzo Carnico	1601	1102	-31	Barcis	1056	256	-76
Lauco	2529	805	-68	Cimolais	1092	431	-61
Tolmezzo	8329	10659	28	Claut	2408	1027	-57
Verzegnis	1818	929	-49	Erto e Casso	2219	389	-82
Villa Santina	2002	2223	11	Frisanco	1568	683	-56
Area Tolmezzo	17478	16538	-5	Tramonti di Sopra	1614	385	-76
Marborghetto Valbruna	1512	965	-36	Prealpi Carniche - Est	11082	3460	-69
Tarvisio	6438	4683	-27				
Valcanale	7950	5648	-29	Montagna friulana	132827	67946	-49

Source ISTAT Italian Census Bureau; <http://www.demo.istat.it>; see map 1.

and Pordenone, Autonomous Region Friuli Venezia Giulia (FVG), Italy, bordering with Slovenia (east) and Austria (north). The area is characterized by many aspects of marginality in terms of losing capacity, of depopulation, of weakening of welfare systems, with emergence of "ghost" cities and villages (Čede, Steinicke, 2007). It means, in a context

of regional-structural transformations, the degeneration in a new condition of dependency, with the spread off of a perception a self-insufficiency.

The settlements are dislocated in a scarcely populated area of about 42.5% of the whole surface of the region FVG (7 857 km²), with a population of 67 946, that is 7% of the whole regional population

(1 236 103 inhabitants). Such figure is getting even worse because of long term trends out-migration, demographic ageing, economic decadence, with proliferation of "Wüstungen", deterioration of social connections, mis-management of landscape and environment, worsening of infrastructural networks, and further signs of decay².

The decrease of population counts for a half in the last 50 years, from 132 827 in the '50ies to nearly 67 946 in current census data (tab. 1); the demography is worsening also because of correlated ageing, migrations and "brain drain" effects, with the indicators showing a long-term migration to the leading centers of the southern part of the area, where are settled the administrative and industrial centers, far from the mountain area (especially the cities of Udine and Trieste).

This leads to increasingly marginalization problems, a paradox, if we consider that the MF valleys are historically the "Pass-land" on the Central-European axis, between the East and the West, the North and the South of the continent, and are currently crossed by relevant infrastructural corridors like highways, high-capacity railways, pipelines etc.

Actually, local societies can just perceive the dis-advantages of such flows (pollution, crowding, commuting-traffic), that just stream massively up and down the main Alpine channel, ignoring the lateral valleys of this area (indeed worsening the sensation of being excluded of the reality). In fact, such streams appear just as the metaphor of the modernity, passing "through" or "over" the peripheral MF, with flows of peoples, tourists, freights etc. crossing this area, not including and not aiding in any way the local communities.

4. Structural and cultural weakening in the late modernity

Obviously, such weakness is not exclusive of this area; critical long term trends have been observed along the Alps and other mountain and emarginated areas (in Italy it is the case of western Alps and of Apennine mountains, at the contrary of well developed and demographically stable Dolomite and Central-Eastern Alps). Nevertheless, here, although

considering some recent counter-tendency elements, mainly induced by amenity settlement and emigration movements, the crisis manifests an extraordinary persistence, evoking the existence of specific circumstances.

Such weakness manifests itself in both cultural and structural terms; the former is proved by a progressive lost of social common rituals and by the spread out of indiscriminate outcry attitudes. The latter by the long term deteriorating of economic and demographic situation. Indeed it is difficult to state, in which way such processes are correlated and mutually influencing, whether the cultural weakness is the cause or the effect of the territorial crisis (the condition of periphericity), or the reversal. It has to be suppose that such processes are intrinsically connected.

Such trend began to be irreversible during the time of late modernity, starting from the '50ies, when became evident a condition of structural delay of the MF compared with other parts of the region (the southern and coastal plain and cities). It happened almost surprisingly. After the late modernity turn, the valleys suddenly have found their selves in a condition of periphericity (at the contrary, in pre modernity period the mountain valleys have been comparatively flourishing), with the diffusion of the perception, by the side of the mountain populations, of being deprived of something, to the benefit of the urbanized part of the region.

During this period the southern alluvial coastal plain (more suitable for developing scale economics for business, communication and production in modern terms) begin to show the characteristics of the rapid development, with massive "third industrialization" and consummistic development (urbanization, spread out of middle class culture, increasing well-being standard, automobile and private mobility etc.), since that time generating an attraction effect on the – from that time – emarginated mountain.

Since the '50s the southern urban-industrial areas began to attract peoples and resources of the mountain, whose economics began reciprocally to show the signs of a weakness, as a consequence. Such negative trends developed progressively until the final crisis, configuring a wide desertification effect for entire MF valleys, and once decreased below some threshold, risk to collapse and disappear. Such effects seem to evolve in a contextual regional-level "zero sum game", with economics and societies losing value and cohesion and depressing irreversibly in a "closing in its self" system, then giving birth to an ideology based on claims and protestations.

² "In nessun territorio della zona alpina il processo di spopolamento è così incessante e così fortemente radicato come nelle Alpi friulane, dove accanto ad appezzamenti abbandonati si sono configurati luoghi completamente disabitati (ghost towns); luoghi questi, dove dunque, sono fallite anche le tradizionali strategie di sviluppo economico e territoriale atte ad arginare lo spopolamento" (Steinicke et al., 2007, p.549).

The structural weakening configures the exactly parallel to the social weakening, which is epitomically described by the disappearing of regulation codes, and furthermore by the spread off of intestine conflictuality. Further consequences of such drift are the spread off of several social disturbances, and finally emargination and mass population out-migration. Indeed, a vicious circle exerting a dramatic effect for conservation of the local culture: the progressive weakening of communities, loosing self-confidence and the respect in their own culture, loosing codes that demonstrated to be enough efficient to permit the long term survival of the community in the past times. A progressive weakening that would probably combine with further fragmentation tendencies, placing a lethal threat to communities with millennia of history.

This especially in an area which is characterized by an extreme variability in cultural linguistic terms: the crisis in MF means the threat to a borderland mixed region, characterized by Romance (Carnian, Friulian and Italian), Slavonian-Slavonic and Germanic speaking groups spread out in the valleys. A place representing the transition area between the central-European and the Mediterranean space, among the Balkans and Italian peninsula and the Danube valley (Wendt, 2001) (in which the different European linguistic cultures have met since ancient times as spontaneous historical diffusion (Ilieş et al., 2011)).

5. The flourishing of micro identities

Nowadays such different cultures nowadays are affected equally by crisis factors and are showing similar reactions. The data describes a long term weakening, in which economic worsening is combining with social uncertainty, affecting inevitably on the identitarian dimension: a context inclined to intestine conflictuality, with cultural and material codes just overlapping any further local contraposition, and inclined as well to proliferation of ethno-linguistic micro-identities – the variable considered in this study, rather than of other character, such as religious, ideological-political, or strictly territorial.

On the basis of our investigation it is possible to enlist a sequence of “innovative” identities, from the traditionally recovered to apparently totally invented ones, from what it is possible to define as a revival identity to a neglected one, for variants not (yet) recognized as a national standard or not recognized at all, neither by scientist (philologists, geographers, sociologists) nor by official institutions. Some of those are indeed based on the expectation of local

groups to be recognized as an authentic culture, or to be accredited as local variants of official language, claiming for ethnographic peculiarities e.g., in culture, traditional music or vernacular literature (mainly oral), or even “genetic” terms (see below the grotesque case of Resia valley).

Such claim would be based alternatively on something primordial (therefore indemonstrable), assuming a “culturalist” marker as the evidence of a peculiar identity, often as a strictly geographical issue (the belonging to a valley, to a village, to a fraction of a village, to a special landscape, mountains or rivers etc.). Rarely it develops in civic/rational terms, namely targeting the representation of a common interest (e.g. the claim for a material need, for control on political action or for infrastructure improvement, the spread out of environmental questions movements), demonstrating that in such context the civic approach is usually weaker: due to the social “confusion”, people rarely participates to elaboration of public life in rational terms; e.g. they do not attend to civic assemblies, but they are inclined to undertake informal quarreling or occasional protestations, tendentially assuming rebel attitude.

More often the spread out of innovative identitarian movements is the result of a distorted social dynamics, resulting e.g. from the contraposition between two or more associations, each one claiming for “purity” or for a sort of primogeniture. In other cases the acknowledgment of a new culture is just the result of “top down” politics, often pursuing a “positive discrimination” manoeuvre (considering that the modern welfare state usually supports local minorities).

Sometimes it results from the initiative of some influent local faction or personality (e.g. the Major of a small municipality, the VIP residing in a rural area, the entrepreneur offering working places) pursuing individual objectives. Other times the foundation of a new micro-culture is a direct consequence of a manipulative use of local media, with some association or some individual (just as a hobby or as a game) founding a new “variant” of a certain ethnicity, starting with the organization of a local movement. Sometimes the promotion of an innovative identity relies “tout court” on a manipulation of a certain tradition, in other cases it comes from the “refuse” of some innovation (in conservative or escapist terms), eventually perceived as an imposition (it is the case of the superposition of a national linguistic standard on a local dialect).

All these, cases potentially inducing domino effects (a kind of “fractalization” of identities, using the Appaduray terminology) (Appaduraj, 2001, p. 68.), with the creation of apparently innovative

movements, as well as the diffusion of negative attitude, namely of identities induced just by a reaction in contraposition circumstances (Korostelina, 2008). Such effects are realizing in a fragmented context, with informal groups or just single individuals purposing an innovative language in a sectarian context, in an arbitrary manner – a paradox, considering that the first function of a language is to be an instrument for improving the communication and to enlarge the audience (Minnich, 1993).

6. Test area

Such tendencies have been observed in a wide series of case studies, nearly in any village of the MF, assuming different forms and instruments – such as home-printed booklets, social media, blogs and web pages, inter-personal circumstances, start up of spontaneous committees, as well door-to-door communication networks. Sometimes the contents of such expressions are similar to an occasional outburst, other times they are the beginning of a wider movements, inclined to assume as well political character with the intention of pursuing objectives of social influence. Indeed, such ways of expression are not always significant indicator of a consolidated public opinion, but just “iceberg peaks” signifying a “minority” of organized agitators trying to “opening the door” in the local society, pursuing particular targets.

Furthermore, beside the usual communication circuits, such movements are spreading out on the web, assuming a typical immaterial form, as a universe of information, opinions and “taking sides”, occasional polemics and disputes on the “blog-sphere”, which is becoming a kind of arena for the local dialectics – indeed often manifesting in self-referential modes, since not inducing a significant feed-back. In general these expressions rely on the tools offered by the free communication, without filters and censure, in order to get a wide communication base (considering also that the accessibility of such instruments is usually easy and inexpensive). All this is configuring a general confusion of expressions and open source media, in which the local society is inclined to express, manifesting sometimes drift effect of the “trash” communication (e.g. indulging in offensive and vulgar language).

Such material has been analyzed with a screening method: an information base not necessarily expressing something coherent, but a good barometer of local tension, with communication tools used by individuals and associations as simple multipliers of opinions. Indeed, they have to be considered just

what they are, namely spontaneous liberatory expressions: either than the purpose of some solution, the simple outburst of some frustration.

Furthermore it has been performed a search on local newspaper, especially on letters column, as well as on articles written by local correspondents (usually not professional journalists). This assuming that the private readers letters sent to newspapers would represent a way for “measuring” the identity-proliferation phenomenon. Such newspapers are the *Messaggero Veneto* (MV), based in Udine, the *Il Gazzettino* from Udine-Pordenone and the *Primorski Dnevnik*, Slovenian newspaper of Trieste, all of them printed outside the investigated area (since no daily newspaper settles inside the MF).

Local periodicals with different origin have been as well reviewed, such the *Dom* and the *Novi Matajur* (from Cividale, in Slovenian and partially in local dialects), *La Vita Cattolica* and *Il Nuovo Friuli* (from Udine, in Italian and Friulan). Names of privates, when cited, have been punctuated. Such letters are – as verified – usually not filtered, even when usually selected by their polemical potential in mobilizing the public opinions, in order to manifest the latent tensions (and presumably to increase newspaper circulation).

Such letter are supposed to be significant indicators even when considering some biases, as the repetitiveness of some writers: when the polemical “violence” would reach the top, waves of letters inundating the newspaper editorial board, soon disappearing after a while. It has been estimated that about 40% of the letters are targeting directly or indirectly the identity issue, offering material for a possible list of self-defined identities.

In particular with these articles it is possible to describe the situation of minority belonging considering the three most important minority groups located in MF, in respective areas of historical settlement, applying a symmetrical investigation on the three linguistic roots. This in order to verify differences in the behavior of such groups, whether they are assuming different attitude evidencing “culturalist” significance.

7. German variant: Carnia and Valcanale

German speaking settlements in MF have a particular form, since they diffuse in isolated rather than continuous settlements (Weixlbaumer, 1988; Steinicke et al., 2011b; Domenig, 1997). It happened because of original formation of such communities, deriving from late medieval colonization of German settlers, who assumed in this area mainly an



Fig. 2. The title of village booklet meaning “that’s life... but no devil can understand it”!, a slogan in self codified language, not using German graphic signs, stating implicitly – with some complacency – that nobody can understand it

Source: Zaiting van Cirkul Kultural va Tischelbong, n. 67, August 2011 (cover sheet).

“infiltration” schema, with forestry and mine workers (traditionally using diffusely iron instruments for the diverse activities) settling inside Furlan and Slavonic populated area (already existent since the early Middle Age times or even earlier), where the population were devoted mainly to extensive agrarian-pasturage activities.

This population settled remote places, at that time not yet occupied, like lateral valleys, high mountain plateau or shadow side of the valley, where there was possibility for forestry, mining and blacksmiths activities (in Tarvisio, Valcanale valley), or mountain farming and transhumance, like in Sauris (Ger. Zahre), Timau (Ger. Tischelwang, local German dialect Tischlbong), and Sappada (Ger. Ploden)³.

Other groups settled in other periods in Valcanale (Ger. Kanaltal, Slo. Kanalska Dolina, Fri. Val Cjanal), when German speaking peoples followed the expansion of Austrian empire in the centuries, namely the consolidation of its administration apparatus, composed mainly by officials, clerks, merchants, businessmen, contributing to the formation of the commercial town of Tarvisio (Ger. Tarvis, Slo. Trbiž, Fri. Tarvis), Pontebba (Ger. Pontafel, Slo. Tablje, Fri. Pontajbe) and Malborghetto (Ger. Malborget, Slo. Naborjet, Fri. Malborghet).

Further traces of German-Austrian culture settlement are spread out in the region, but not represent a compact unity with historical continuity (as eventually in Gorizia and Trieste, cities which maintain a well recognizable cultural and urbanistic Habsburg semblance).

About this relatively few and insulated cases there is available scientific literature. In these case it is possible to observe active groups of local revival, culture etc., assuming either than the German official language, the local variant; Hochdeutsch is considered for school purposes, but for the local dialectics it is clear a tendency of elaborating an innovative code. Such case of “spin off” of new language (evoking a particular culture) would evidence an incongruence (or, from the localistic point of view, a coherent attitude) between the linguistic code and the national identification; actually such groups are preferably defining their selves as “friulani” with, as mother tongue, a German (Austrian) dialect (see fig. 2).

A curious approach to such phenomenon, considering the dimensions of this communities, consisting of few hundreds of peoples, with the language used as an instrument for ethnic self identification (inside communication), not really for wider (then “true”) communication purposes. Similar questions are common for further high mountain settlements, where the local association seems to be inclined to use an original linguistic marker. At the contrary in

³ which actually lies in province of Belluno, in Veneto region, but is in predicate to adhere to the province of Udine.

lower parts of traditionally German speaking valleys, the investigation shows a different situation, with the existence of associations claiming Hochdeutsch as the own language (the Kanaltaler Kulturverien in Valcanale), organizing standard teaching courses, with some dozens of subscribers; as far as we know, in this circumstance there are not groups claiming Austro/German local variants.

This possibly happens because of the "urban" character of such community (pivoting the administrative centre of Tarvisio), or probably because of the continuity with the Austrian territory, or because of the prevalence in the border area of functional use of the language for tourism, business or trade (possibly because the minority is alimanted by "fresh blood" cultural inserts as well by economic initiatives from trans-border area).

Different situations are represented by the traditionally mixed Slovenian/German area like Camporosso (Slo. Žabnice, Ger. Saifniz, Fri. Cjamparos) and Valbruna (Slo. Ovčija Ves, Ger. Wolsfsbach, Fri. Valbrune), which can be better to be interpreted in the category Steinicke defined of "diffuse Ethnizität" and of active multi-lingualism, characterized by the attitude of the local population of adapting the used tongue to circumstances. But such hybrid-multilingual traditions seem to became rare and even to extinguish.

8. The Slavonic variant: identity labels and classification refractory cultures

The further case is that of the Slovenian settlements, which are localized on the western side of the Julian Alps watershed (approximately) and therefore historically gravitating to Venetian (and then Italian) political area, either than to Slovenian outback (previously under the Habsburg and the Yugoslavian rule). Such settlements are characterized by territorial continuity and ethnic coherence on the eastern belt of MF: indeed a coherence mostly just apparent, since the structure of the Slovenian speaking population is composed by rural clusters scattered in a wide topographic fragmented area, scarcely communicating with each other. In fact the relations between these communities with the Slovenian upper Soča/Isonzo valley have been rather weak in the history, and have been further obstructed (hindered) by the superposition of political state borders (especially in Venice and Habsburg epoch).

This fact provoked a dependency on outside areas, preventing integration in a wider Slovenian speaking area, in particular preventing the formation of urban elite during the modern time able to

represent the ethnic character of the rural population (as it happened e.g. for others Slovenians "outside Slovenia", who could refer to the social elite of towns such as Gorizia and Trieste or Klagenfurt) (Jelen, 1996; Vavti, 2007).

The current fragmented pattern is particularly evident in the sequence of valleys along the Italian-Slovenian border from the Valcanale in the north, to Resia (Slo. Rezija), Torre (Slo. Ter) and Natisone (Slo. Nediža) valleys, to Collio (Slo. Brda, just north of Gorizia), configuring a set of divided settlements, depending culturally and structurally from non-Slovene towns of the Italian plain, towards them they possibly developed a sense of cultural subalternity. Nowadays such situation represents the ground for a tendency to further fragmentation, in several terms, linguistic and cultural, combining with further differentiation schema of social, economic (rural/urban, rich/poor, modern/traditional, conservative/innovative), topographic (plain/mountain) and then of ethnic and linguistic character (Slavonic/ Romance, and finally local dialect/literary Slovenian).

Such binary classifications are characterizing the discussion about the identity at any level, inside the communities, between the communities and Friuli neighbors, the Italian provincial authorities, as well the official minority institutions based in Trieste and Gorizia, and finally the Slovenian national outback. A kind of historic and geographic "incoherence" – namely a gap between ethnic identity and political belonging – which seem to incentive an attitude to particularisms, as well as an attitude for escaping any classification (see Fig.3 as an example of self-codification of local vernacular Slovenian used on the media).

An inclination relying sometimes on a kind of representation of the "self" as original and non reproducible paleo-Slavonic units, that have to be preserved from any "contamination". A definition contrasting the one purposed by the Slovenian nationals, who are advocating the assimilation to the language standard, which sometimes is interpreted by local autonomists as a maneuver pursued by the national lobby for extending the political influence on the valleys (repurposing the image of the former Tito's Yugoslavia communist expansionism). A situation exacerbated by the effects of the mentioned structural crisis, prospecting a mix of motivations and of disputes in which material and indentitarian elements are continuously confusing in small communities, that appear to be bound to further divide until a probable auto-destruction.

The level of the polemics between standard Slovenian and (supposedly) not Slovenians assumes an increasing relevance in recent years, reaching the

juridical/penal level, regarding outrageous outcry and asserted lethal “threats” (“Resia: the defense for the Italianity now is finally in front of a judge”)⁴. In some circumstances the identity quarrel reaches the level of the “genetic” discussion, therefore – as the Major of Resia stated – not to be classified “tour court” as Slovenian but as something particular and unique (“Strong attacks to C. for the ‘Resian race’ [sic]”)⁵.

In fact such presumed uniqueness of Resia (and eventually of others communities) is advocated in a incongruent manner. This lobby alternatively claims the inclusion in a Slovenian cultural space (as in occasion of the adherence of Resia to the regional law 38/2001 prospecting subsidization for cultural minorities, see below), or the exactly opposite, underlying the uniqueness in “genetic” terms (indeed a usual characteristic for any isolated villages, considering as well the genetic drift, to which were exposed communities in the long term of pre-modern history). Such positions mature in circumstances of contraposition among groups, swinging among opposite theories (namely the belonging to the Slovenian matrix, the absolute refute to such belonging or something else).

Finally such attitude would contaminate the local society, who is systematically dividing in factions, contrasting each other and competing for social influence, generating a number of associations inside and outside the valley⁶, polemizing vainly on local booklets, newspaper rubrics, blog-sphere and further social communication tools. The question has been recently purposed again at official level, considering the decision of the Resia municipality of adhere to the status defined by the mentioned regional law 38/2001, prescribing benefits for the promotion of communities classified as Slovenian (introducing possibly an asymmetry among Slovenian and self declared non-Slovenian).

In that moment the Municipality council decided to adhere to that classification – namely it applied to that project – with probably the intention of not being excluded by the aids that would be provided by the law (whose original intention has been the protection of linguistic minorities). However, the Municipality council – following a sudden change in public opinion, probably as a consequence of a disappointment in such expectations – just retired its

⁴ MV, 15/9/2011, p. 49, A.C.: “Resia: la difesa dell’italianità ora finisce davanti al giudice”.

⁵ MV, 16/6/2010, p. 12, “Duri attacchi a C. per la ‘razza resiana’”; names of letters authors have been cited per initial letters.

⁶ Like “Identità e Tutela val Resia”, <http://itvr.blogspot.it/>; “Tutela e identità Valresia” [11.11.2016], <http://www.valresia.it> [11.11.2016], and others.

adhesion⁷, and deciding to adhere to the opposite language “front”. Then “the Municipality Council deliberated to comprehend the Municipality of Resia in the category of those protected in quality of being of Friuli origin”⁸; a decision configuring a paradox and a philological “non sense” considering that the Furlan is a Romance language.

From this point of view, such change of Resia municipality derives from a confusing representation of the identity, with lobbies “playing” with the different variants, eventually inventing them. The volatile interpretation of the own identity appears as a tactic, but it could represent as well the “mirror” echoing further disputes (material/economic), and then the sign of an internal weakness, in general the tension induced by a condition of remoteness and the fear of being definitively excluded⁹.

Such tensions are expressed by some letters, signed by the president of the association “Identità e tutela Val Resia”, actually based in Udine (therefore outside the valley),¹⁰ stating that “despite the studies about genetics on Resia – a unique ‘ethnic group’ – and the millennial 1400 years long settlement in the valley, we are condemned to be a Slovenian National Community, robbed of our identity, of our traditions and of our culture”¹¹.

In fact the local – scarcely codified – languages represent something suitable of adaptation, with phonetic and graphic signs, lexicon and grammar differences being instrumentally stressed or minimized, alternatively, in order to underline a belonging. The Slovenian standard answer to the above assertions is: “pristaž take politike je sam župan S.C., ki si je izmislil nestrokovno pisavo krajevnega narečja, da bi se čim več oddalili od slovenščine”.¹² The Messaggero Veneto reader N.S.G. in his letter “Investimenti ed emigrazione”¹³, citing prominent Slovenian linguists makes clear the rainbow of different position stating that “Philologists state scientifically that [the local dialect] belongs to one of the seven dialectological bases, in which the 47 Slovenian dialects

⁷ MV, 15/8/2010, p.11, “Resia, il consiglio comunale non vuole la tutela per le minoranze slovene”, A.C.

⁸ Author’s free translation from Italian.

⁹ MV, p.17, “Piuttosto che unici, in via di estinzione”, 1/7/2010.

¹⁰ signed A.S., MV, p.14, “Determinazione ingiusta”, 19/8/2010.

¹¹ Author’s free translation from Italian.

¹² R.D., 2012, Ali bodo v Reziji Slovence izgnali iz doma, ki ga je podarila Slovenija? Dom. Kulturno verski list, XLVII/15, August 31, 2012, p. 11, čedad/ Cividale d.F. (names are punctualized since concern private letters).

¹³ MV, p. 17, 16/9/2010.

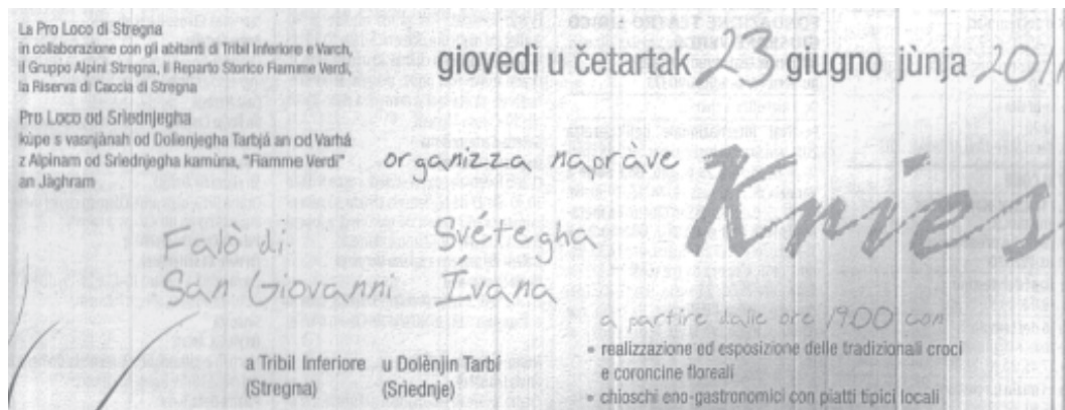


Fig. 3. promotion of the rural celebration in the village Stregna in occasion of the event called "Kries"; poster composed in Slovenian dialect (or paleo Slavonic) self codified written language

Source: MV 19/6/2011.

were classified, therefore the introduction of the bi-lingualism is legitimized"¹⁴.

Resia – a remote beautiful alpine valley, with less than 1 000 inhabitants, surrounded by the majestic snow covered peaks of the Mount Canin – represents the paradox of identity in times of globality, with conflicting associations claiming by chance the exactly opposite, namely the belonging to the Slovenian koinè, the Friulian-Italian loyalty, or the absolutely uniqueness, with a sequence of intermediate positions.

9. Romance Variants: the Friuli culture

The Friulan situation presents similar aspects, but on a different scale, highlighting the same fundamental question, and the same tendency to arbitrary disputes about something that indeed is impossible to define in positivistic-objective terms (namely the codification of a language that was never been used as a written official language). Such language (the "Furlan") is an ancient language, resulting probably from the mix of Latin and Celtic elements occurred since the time of the Roman conquest of the area.

This code resisted to different waves of standardization thank to the fact it remains the language of a population occupying peripheral areas, that, indeed thank to this condition, survived for centuries until today – differently as happened to the languages spoken from time to time by the military and urban elites, derived from powers and populations who invaded MF in the past from outside (Roman, Longobard, Slavonic, Hungarian, Turk, Venetians, Habsburg etc.). This fact brought to the elaboration - indeed rather late in the national history – of the

rhetoric of the "Patria del Friuli" (fatherland) in the frame of a well definite territorial imaginary, originating by the glorious history of the Aquileia Patriarchate, the medieval "state" which represented the original myth of such "patria".

Geographically these territories lie in the area between the mountains and the see, and between the two rivers Tagliamento (on the west) and Isonzo/ Soča (on the east), configuring something "organic" and ideal, about that any Furlan should be conscious. Such ideal had in the last decades an important revival – after centuries of being neglected, mainly in favour of official Italian standard - assuming the significance of the reaction to a supposed imposition (then a "patriotic" idea generated by the reaction to a "cultural imperialism").

Finally the Furlan culture representatives claim a true national dignity based on a long tradition, being the language spoken in a much wider area, when it was the main language of the whole arc from the Central-Western side of the Alps (connecting with western European Gallic languages) to the Upper Adriatic (Trieste and Istria). A residuals of such languages would be the Ladino spoken on the Dolomits, the Rumantsch in Graubünden (Switzerland), and the Istrota in Istria region (Croatia). Nowadays it is spoken mainly in Udine province, in part in Pordenone and Gorizia area, by a few hundreds of thousand of peoples. It suffered especially in modern times an emargination process, when it has been confined in rural areas, with the main towns in Friuli assuming progressively the language of the authority (usually a Venetian dialect, then Italian standard).

Since that times the Furlan evidenced a typical minority-subalternity complex ("sotans" vs. "sorestans") (Maniaco, 1985). In many times a set of institutions have been established to improve it. It is the case of the public Societât Filologjiche Furlane (SFF), and of

¹⁴ Author's free translation from Italian.

others initiatives that have been promoted in the spirit of the “positive discrimination” principle, the modern welfare state applied in order to sustain the minorities. It provides above all the necessity of codifying the (almost exclusively until then) oral use language, in order to unify the different variants, and to limit the ongoing erosion (typical indeed for any minority languages), which would otherwise endangering the language and the ethnicity in its whole.

Today the main issue is about a definitive – generally acknowledged – written mode, in order to make of the Furlan a code susceptible of being applied as well for institutional purposes, for education at any level of schools and public communication. A question connected with that of lexicon, phonetic, graphic, syntactical and grammar rules, the SFF had the statutory duty to elaborate and certify – a task, institutionally promoted, but started immediately a sequence of disputes. In such context the language question assumes further motivations, signifying the reaction against “imperialistic” attitude of the major cultures (targeting alternatively Italian-state centralism, “globalization” and multi-cultural society, European “bureaucracy”, computer and television culture etc.).

Above all, it means especially the arising of a bulk of claims for not “orthodox” variants, eventually accredited as more authentic, sometimes just evidencing slight linguistic differences, symbolized by the academic herudite quarrel for an “o” or an “e” as final word letter or some other apparently not much significant questions. Such claims are diffusing in the different areas in the Furlan spoken area, especially in the MF and in further peripheral areas. Virtually any village would purpose a cultural self defined code, a fact that, whether from a cultural point of view could be considered an element of vitality, from the “tactic” of the promotion of the minority in its whole represent a set of problems.

Furthermore, such diversification tendency is often superimposing to administrative issues, and to autonomy claims, sometimes justified in terms of the revival of local identities, sometimes just instrumentally used for the purposes of some territorial lobby. It is the case of the mountain movement for establishing a new “province”, to distinguish the “Friulani” from the “Carnici”, separating them from the “imperialistic” Udine, considered the capital town of Friuli, for a population supposedly composed by Carnian-Celtic descendents in the Carnia.

10. The Lega Nord movement

This movement realizes by chance in the politically-oriented Movimento Friuli, inspired by autonomy ideals, but maintaining rather a moderate tone (it never claimed for secession, just for administrative autonomy and cultural promotion), relying on a popular reformist movement, opposing any centralistic elite – in particular the Italian statist culture, accused of having de-nationalized the Furlan culture once it assimilated Friuli in its administrative frame. Movimento Friuli had some success in the ‘70s and in the ‘80s, then disappeared and gone into a major wave of an autonomist party with more radical program, which spread out in Italy in late modernity times. This can be considered the last stage of a fragmentation processes – indeed assuming eventually radical significances, with the spread out of the well-known Lega Nord party.

Such movement – originating outside the Friuli region, namely in Lombardy and Veneto – would possibly signify a radicalization of similar process assuming immediately political consistence. It would mean the rebellion against the political capital Rome, claiming for taxes reduction, state devolution and the transformation in a federal constitution, assuming by chance xenophobic attitudes. It claims a program relying on the foundation of a “totally invented” new identity (Agnew, Brusa, 1999, p. 123; Albertazzi, 2006), recovering a mythical Celtic primordality (representing the image of Celtic tribes fiercely resisting to Roman invaders), assuming from the beginning the sense of a rebellion.

A movement rapidly spreading out, that can be interpreted in many ways, as the reaction to a “end-of-the-cycle” welfare state, as a populist variant (cyclical for democratic systems, as happens in many others European countries); it assumes the late modernity typical form of the revolution of the “haves” against the “have-not” (the North against the South), with the aim to resist the re-structuration the welfare system, the modern state built over the years. A “[...] post modernist territorial political movement in its self-conscious manipulation of territorial imaginary” (Agnew, Brusa, 1999, p. 123). In fact the Lega spread out in Friuli and elsewhere in North Italy, gaining consensus, claiming alternatively secession from Rome and from the European Union, or “tout court” the fight against multi-cultural ideology, evoking the risk to be invaded by Islam fundamentalists, North African refugees, East European immigrants or Chinese business men or someone else.

Finally the movement reached many times the ruling position at several local and regional level and (paradoxically), on Italian government in Rome (hold

in periods 1994–1995, 2001–2006 and 2008–2011, in a coalition supporting Berlusconi's party). Indeed, such movement overlies just to some extent the Movimento Friuli, which never advocated such extremists claims: the correlation between Lega Nord and Movimento Friuli seems not to be very strong, sometimes they are mutually exclusive, even when several Movimento Friuli leaders took actively part of Lega Nord movement. In general, it is possible to say the Lega Nord originated from a domino effect induced by the spreading out of an artificial way of elaborating identities (paradoxically provoking the loss of significance for the concept of "identity").

11. The ongoing changing inventory of identities – true or fictive?

The question of defining an identity represents something new in the new global reality, confusing and upsetting the relatively stable structure of the modernity. In some circumstances it starts a process, which – once started – would be impossible to be kept under control, assuming finally political significance (as the Lega Nord, risking some geopolitical drift, claiming separatists programs). Obviously, when the identity becomes suitable of being innovated arbitrarily (or "pluralistically") innovated, it risks the loss in significance, degenerating in something superficial, suitable of being used instrumentally.

Therefore, it is difficult to elaborate a method in order to verify such invention as something true or fictive, justified or arbitrary. The fundamental right for anyone of expressing his self with a preferred code (a re-invented "mother tongue", a new "ethnicity", a political-territorial movement etc.) appears in conflict with an idea of cultural efficiency of the community, relativizing the same idea of the identity. It is the case of MF with a set of communities persistently breaking in new parts, dissolving the cohesion of settlements and cultures, and the concept of identity properly collocated in a definite geography and history. A process indifferently affecting the language groups in the area, demonstrating that such "syndrome" affects indifferently any ethnicity.

Finally this process is bringing to the creation of a list of labels configuring a kind of local "Babylonia": a paradox, considering that the language obviously exists for communication purposes (both, inside and outside the group), that prefigure the risk for self-destruction of some culture. Indeed in these circumstances the identity-linguistic marker seems to be used mainly for oblique purposes, as the consolidation of a "faction", pursuing some particular target. This phenomenon means something different as the

arising of a multi-linguistic area (a "diffuse Ethnizität" condition theorized just few decades ago) (Čede et al., 2012), configuring possibly a self reflexive game, where just the contraposition would represent the original causality for the formation of a new identification code: a vicious circle indeed, that would signify the risk for the relativization and then for the possible extinction of the local culture.

Furthermore, such "Babylonian" uncertainty makes any institutionalization of that code impossible. The question of the acknowledgment of a official status (which seems to be essential in order to give to a local code a chance of survival, e.g. predisposing bilingual tables in public areas, lecturing in schools, using the written language in administrative acts), and the transcription for the written use (which is practically useless when the language is spoken by few hundred of peoples) appear as something impossible to realize. Sometime the institutional work of the officially recognized organizations is openly contested, demonstrating once more that in these circumstances the national character of a culture is difficult or either impossible to ascertain.

The risk is that the impossibility of standardizing a mixed dialect would bring to the disappearance of such code; it happened recently to many fringes of the investigated area, prospecting a progressive erosion of the multi-linguistic culture of Friuli, to the advantage of a standard code. It is the case of the disappeared S.Leopoldo area dialect in Valcanale (Slo. Lipalja Vas, Ger. Diepoldskirchen, Fri. Laglesie), mixed Slavonic and German, as well the mixed Slovenian-Friulian tongue of the Montenars village in the Gemona area, and of many others; it would be possible today to draw up a map of dissolved local cultures, mainly due to the incapability of maturing a coherent position. Indeed the question of the "purity" (a primordialist/ essentialist approach) of some culture (the "Hochdeutsch", the "uncontaminated" Slovenian, the official Italian, the authentic Furlan or the "purity" of the respectively local mixed variants) could bring to something obsessive, but the complete arbitrariness would provoke to lose the sense of social-territorial belonging.

In fact, the groups advocating such originality configure a paradox within communities living together since 1 or 2 millennia suddenly discovering to be something different. In such situation, with the infinitesimal proliferation of micro identities, with the communities becoming smaller than the subsistence threshold would require, further criteria for the authenticity accreditation are a need (Heynen, 2006; Chai et al., 1986).

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TEN YEARS OF EU MEMBERSHIP – BENEFITS FOR SLOVAK REGIONS

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Abstract

The article defines and characterizes the challenges and changes in regional policy after ten years of membership of Slovak republic in the European Union. It analyses and compares the aims, measures and benefits of EU regional policy towards given regions Trnava and Nitra. The article compares the approaches of Trnava and Nitra regions towards EU structural funds and how they used this opportunity for their development.

Key words

regional policy, Trnava, Nitra, structural funds.

1. Introduction

Although the EU is one of the richest parts of the world, it suffers from significant inter-regional and inter-state differences in the level of prosperity. The wealthiest member state, Luxembourg, is seven times richer than Romania and Bulgaria, which are the poorest members of EU-28 countries. Economic, social and territorial cohesion, or also known as cohesion and regional policy focuses on reducing economic and social disparities between EU regions, aiming to contribute to building the EU internal market.

The basic unit for the discussion is “the region” and its problems. Region, unlike the state, shows the natural result of differences between regions. It has

such cross-border as national content, and for cross-border is considered the region whose specificity goes beyond national borders and applies either to large groups of people with common ethnic features or geographically defined area or zone made up of the economic, military or other criteria.

Regional disparities within the EU cause a number of factors such as the long-term disadvantages caused by geographical distance or sparsely populated; recent social and economic changes; enduring legacy of the former centrally planned economies, or a combination of these and other factors. The result of this unfavourable condition is often manifested by social deprivation, poor quality of schools,

higher unemployment and inadequate infrastructure. The main goal of regional policy then is the full potential use of individual regions; improving competitiveness and employment through investment at regional level in areas with high growth potential and added value for the EU as a whole and as quickly closing the gap with the EU average in countries that joined the EU since 2004.

And such a country is Slovakia. Although existing differences in economic and social development of individual regions arose there in the past they intensified after the changes in key economic sectors. These regional disparities need to be addressed and therefore this area falls within the priorities of the regional policy of the Government. Regional development is carried out through the Regional Operational Programmes (ROP), which are linked to EU Structural Funds and designed to increase the availability and quality of civic infrastructure and facilities in the regions of the EU Convergence objective, where encompasses all regions of Slovakia except Bratislava. Eligible applicants the grant under the ROP are local governments, regions, founders of pre-school, primary and secondary schools, social service facilities etc.

For the purpose of studying the issue in presented study the authors will focus mainly on the development of regional policy after Slovakia's accession to the EU, i.e. the Programming period 2004–2006 and 2007–2013. The aim of this paper is to compare and find out what goals and tools are selected and used in Nitra and Trnava Regions, as their purpose and effective use. In examining the issue, we used a method of analysis and comparison. Furthermore, we used the method of induction, by which we examined various facts that led to the general conclusion. Within the comparative method, we encountered several problems in terms of methodological approach because the regions selected for study purposes are not working with the same methodological approach evaluating their activities. This led to difficulties in identifying indicators suitable for use in comparative methods. At the same time many relevant sources at European level ranks Nitra and Trnava regions into a single unit and refers to them as the region of Western Slovakia (SK02) with a very similar development and it is therefore difficult at this stage to do a comparative study. For our analyse, presented in this study, we were using the method of evaluating the statistical data, which are drawn mainly from the Statistical Office of the Slovak Republic and official documents in both regions. We also analysed the material provided by the examined self-governing regions such as annual reports, analyses and possible future cooperation, and

the National Development Plan (Národný rozvojový plan, 2003).

2. EU regional policy

EU regional policy is aimed at promoting rural regions and regions suffering from the loss of heavy industry. It developed into one of the most important policies to ensure the EU's competitiveness in the global economy. It reflects the principle of solidarity within the EU where the richer countries contribute to the development of poorer countries and regions. It aims to support regions that do not reach 75% of the average level of EU GDP per capita, regions with social problems and damaged environment. Its financial instruments and initiatives there are basically from the beginning of integration. In 1958 creation of the European Social Fund, followed by the European Agricultural Guarantee and Guarantee Fund and in 1975 was founded the European Regional Development Fund (ERDF). Cohesion policy was created in the 70s of the 20th century, following the accession countries with less developed economies and strong regional disparities as the United Kingdom, Denmark and Ireland to the former European Communities (EC). Legal bases for an integrated regional policy brought the Single European Act in 1986. Economic and social cohesion has become one of the objectives of the EC and as its basic principles were introduced: the principle of concentration, programming, partnership (complementarity) and additionality. An important impulse for its development was the entry of Greece, Spain and Portugal to the European Community and approved the plan for the creation of the single market. The Maastricht Treaty introduced new instruments – the Cohesion Fund, the institutions – Committee of the Regions and principles – subsidiarity. Subsequently, the budget for regional policy funds increased to a third of the EU budget. Since 2000, cohesion policy influences the Lisbon Strategy and the planned enlargement of the EU in 2004. Eastern enlargement to 10 new member states of the EU population has increased by a fifth, but the GDP by only 5 percent. The average GDP of the new Member States did not reach half the EU average and that all are entitled to apply for support from the Structural Funds and the Cohesion Fund (Brhlíková, 2013).

In the financial perspective for years 2007–2013 was allocated to cohesion policy 35.7% of the EU budget, which ranked it in the first place followed by promotion of agriculture. Three objectives were set:

Convergence – promotes growth and job creation in countries and regions with the lowest levels

of development. It concerns the NUTS 2 regions with a GDP per capita of less than 75% of the EU average. To this end it was allocated 81.5% of total funding and is financed by the ESF, ERDF and the Cohesion Fund.

Regional competitiveness and employment – to help the richer countries cope with economic and social changes and globalization and the transition to a knowledge-based society. This objective falls under the European Employment Strategy, which supports the creation of more and better jobs by adapting the workforce and investing in human resources. To this end it has been allocated 16% of all funds and is financed by the ERDF and ESF.

European territorial cooperation – continues the initiative INTERREG and promotes cross-border cooperation at local and regional projects, transnational cooperation to support integrated territorial development and interregional cooperation, and exchange of experience. It concerns the NUTS level 3 regions along the internal land borders and certain external borders, the NUTS level 3 regions along maritime borders with a maximum mutual distance of 150 km. ERDF funding is divided according to targets for cross-border and international cooperation.

A thematic channel of funds is directed to transport, human resources, sustainable development, research and development, innovation and information society (Brhlíková, 2013).

3. Regional policy in Slovakia

Differences in economic and social development of individual regions in Slovakia originated naturally already in the past, but intensified as a result of changes in key economic sectors, particularly in the second half of the 90s of the 20th century. In the years 1999–2001 the various program documents as the Integrated Plan of Regional and Social Development, the National Plan of Regional Development; regional and sectoral operational programs were prepared and approved. They formed the framework

for the disbursement of pre-accession funds PHARE, ISPA and SAPARD. In connection with EU accession and subsequent Slovakia's participation on regional policy it was necessary to develop a new set of programming documents, which are covered by the National Development Plan (NDP). This has become a basic program document for implementation of structural and regional policy in 2004–2006. Its key objectives are to increase competitiveness of underdeveloped regions and their performance while respecting the sustainability, reduce disparities in the level of GDP per capita compared to the EU average and functionality of regional policy in symbiosis with the economic priorities of Slovakia. Based on NDP Slovakia could then draw aid from the Structural Funds and the Cohesion Fund and initiatives INTERREG and EQUAL.

In this regard based on the Government Resolution no. 157/2002 the modified classification of territorial statistical units was introduced as suggested by the EU's statistical office - Eurostat and the Statistical Office. The identification of the regions is based on the common system of classification of the Regions – Nomenclature of Territorial Units for Statistics (Nomenclature des Statistiques Unitées Territoriales, abbreviated NUTS). The purpose of dividing Slovak Republic to NUTS is to ensure regional statistics are comparable on the same basis as in the European Union and the regions with different levels are included to the various structural policy objectives of the European Union. When defining NUTS it is based on the complementarity it refers higher units are formed by a number of whole lower units. It also takes into account the size of units in relation to the practice in force in the European Union. Current arrangements in Slovak Republic under this categorization are actually a return to the initial territorial systematization of Slovakia (see tab. 1).

The starting position of Slovak regions had substantive and systemic differences from the original EU countries. The material differences include low competitiveness of individual regions, unfavorable branch structure, and lack of innovative capacity of

Tab. 1. Valid Territorial Systematisation in Slovakia

Unit	Number	Territorial Unit
NUTS I	1	Slovakia
NUTS II	4	Bratislava region, Western Slovakia, Central Slovakia, Eastern Slovakia
NUTS III	8	regions
NUTS IV	79	Districts
NUTS V	2883	Municipalities

Source: Národný rozvojový plán, 2003, p. 14.

regions, monostructural economic base, and differentiated quality of human potential, low traffic access regions as a result of insufficient infrastructure facilities. The systemic differences may include lack of value criteria when designing development programs for individual regions, comprehensiveness and irrationality in the use of intra resource development, slow formation of institutions managing settlement and regional level (Národný rozvojový plán, 2003). Till 31.12.2004, in framework of the Structural Funds were submitted in Slovakia 4,978 applications for the NFC in total project value of 102.98 billion Slovak crowns. On the number of projects submitted, the proportion of the Nitra region was 17%, of Prešov region 16% of the Trnava region of 12%, of Žilina region 13%, Banská Bystrica region 15% of the Košice region 14% of Trenčín 10% Bratislava region 3% (Výročná správa o implementácii Rámca podpory Spoločenstva 2004–2006, p. 55). In terms of distribution of volumes of completed projects in the shortened programming period 2004–2006, i.e. after Slovakia joins the EU, the share of Banská Bystrica SGR 20% HTU Žilina 11%, 16% VÚC Nitra, Prešov SGR 12.5%, higher territorial units Košice 12% , 14% HTU Trnava, Trenčín HTU 12%, and the districts of Bratislava 2.5%. Nitra region submitted a total of 931 applications, while Trnava region only 644 applications (Výročná správa o implementácii Rámca podpory Spoločenstva 2004–2006, p. 58).

The current regional disparities are reflected particularly in the share of individual regions in the GDP, the extent of unemployment, the extent of foreign capital, the level of income in living standards, the dynamics of development of small and medium enterprises. The cause of these phenomena can be also different geographical, historical and socio-economic conditions.

The regions in Slovakia can be divided into three basic categories based on performance. The developed regions with diversified and relatively wide range of different types of industry and services with relatively high production of GDP per capita and relatively low unemployment are regional centers as Bratislava, Košice, Prešov, Banská Bystrica, Žilina, Trenčín, Nitra, Trnava. These are located on the main highways of Slovakia and attract a sufficient number of qualified workforce. The second category consists of regions with a relatively stable economy, located along the border with the Czech Republic and in the traditional regions Považie and Liptov. These regions are characterized by industrial tradition and relatively sufficient amount of own funds. Diversification of the economies of these regions is sufficient and creates suitable conditions for future development. The third category consists of regions affected

by structural problems mainly due to the decline of a particular type of industry (armaments, glass), which is related to high unemployment, particularly long-term, which is also a major problem in the fight against unemployment in Slovakia. This group includes also those areas of Eastern Slovakia and south of Slovakia, which are located outside regional centers and therefore are long term lagging in development (Národný rozvojový plán, 2003). Especially the last mentioned are priority areas in terms of regional development for EU structural funds.

It can be concluded that the existing regional disparities in Slovakia have a character of social inequalities that are influenced by a complex of potential (in particular human resources), infrastructure, lifestyle and positional tendencies. Differentiation is reflected in the social and demographic structure, the rate of unemployment, in terms of social dynamics and migration of the population. It turns out that the differences in living conditions, advantages and disadvantages of local or regional situations are a strong incentive of individual behavior. In the direction from Bratislava, which has a dominant position, further east there is a rising unemployment, more difficult conditions of regional economic development, worsening employment opportunities, and the jobs offer reduction and opportunities to obtain employment. Problem regions are considerably heterogeneous internally especially in the quality of its human resources, since in such a situation are areas with both progressive and regressive age structure of the population. Unemployment in these areas is well above the national average. Investment flows are very low and the average monthly wage is about 20% lower than the national average. The problems persist in the infrastructure and connection of certain areas to the communication (especially transport) infrastructures.

Basically, it can be concluded that the fundamental socio-spatial problems of Slovak regions are:

- existing strong polarization between the capital Bratislava and other regions in a series of key indicators for the standard of living and quality of life (e.g. GDP / capita, average wage, unemployment and others.);
- existing significant differences between districts within some regions in the GDP per capita and income per capita; in regions affected by the necessary extensive industrial restructuring (especially in special and extractive industries), but also in areas with greater focus on agriculture is high and still rising unemployment, failing to sufficiently quickly and efficiently implement the necessary structural changes;

- deepening diversity of rural areas which have a comparative disadvantage to the cities, local authorities in rural areas have unfavorable conditions for business, and there is an aging rural population;
- lagging economic level of border districts situated mainly on the southeastern and northeastern borders of the Slovak Republic;
- persistent lack of connection of these areas (and other areas) of Slovakia on the trans-European communication networks and capital, which significantly contributes to the lack of interest of investors, especially foreign, in these territories;
- the differences between the quality of human potential in Bratislava and other regional cities but also between groups of urban settlements, as well as between the city and village;
- different levels of the regional distribution of R&D, technological development, regional differences also in socio-demographic characteristics of human resources as well as the qualification level of the workforce (Národný rozvojový plán, 2003).

A special category are marginal regions, especially the regions of eastern and southern part of Slovakia. These regions are characterized by low economic performance, low standard of living, and a minimum share of investment (especially foreign), growth of long-term unemployed and socially dependent, low level of industrial development, services and modern infrastructure. An accompanying feature of these regions is also low level of education and a high proportion of at-risk groups (e.g. Roma).

Slovakia tried to deal with the solution to these issues in the programming period 2007–2013. The Regional Policy of Slovakia was implemented in this period by the Regional Operational Programme (ROP)¹, which aimed to increase the availability and quality of civic infrastructure and facilities in the regions. Although the Operational Programme was not directly aimed for supporting the business community it had to contribute to the stimulation of internal regional resources for the development of downstream business activities (SMEs) and increase the attractiveness for foreign investment, coinciding with the National Reform Programme in the area of business environment. ROP was approved by European Commission on September 24, 2007.

By Slovak Government Resolution no. 832/2006 the managing authority of ROP in Slovakia became the Ministry of Construction and Regional Development of Slovak Republic and its powers were passed to the Ministry of Agriculture and Rural Development

of Slovak Republic in 2010, except the coordination of the use of funds from the European Union. The total EU financial contribution to the regional operational program amounted to 1 445 000 000 EUR (Regionálny operačný program, 2008). Self-governing regions should carry out tasks in relation to the following measures ROP:

- Support and development of tourism infrastructure.
- Regeneration of settlements.
- Regional roads ensuring transport serviceability of the regions².

4. Nitra and Trnava region and EU structural policy

Nitra and Trnava regions are neighboring areas. Nitra region as far as its area of 6 343.8 km² occupies 13% of the territory of the Slovak Republic. Trnava region with the area of 4 147 km² ranks the penultimate place in the framework of Slovak regions (occupies 8.5% of whole territory). Both regions are located in the southwestern part of Slovakia, but unless Trnava region forms a common border with the Czech Republic, Hungary and Austria, as Nitra region borders only with Hungary, the Trnava region favors in terms of cross-border cooperation. From a geographic point of view, both regions have similar, since these are mostly flat and lowland character of the landscape punctuated by hills. In both regions there are quality agricultural land and about the same climatic conditions. Both, therefore, in this context rank among the most productive agricultural centers of Slovak Republic. Both regions are rich in water resources occurrence – belong to the Danube Basin, as well as natural resources³ and mineral resources but Trnava region compared to the Nitra region is richer in the occurrence of mineral resources⁴.

² Within the Slovak regions adherent to the Objective 1 has Banská Bystrica region the largest concern of road network (highways, roads I. – III. class and local communications) and the lowest one has Trnava region. On the other side, Trnava region has the largest concern on length of highways and Košice region the lowest one. See: Ministry of transport, post and telecommunication of Slovak Republic.

³ We can name thermal spa in Podhájska, Patince, Komárno, Poľný Kesov and Štúrovo – author's note.

⁴ Mineral resources of Trnava region are represented by oil and gas in the north and by calcite, dolomite and gravel sand reserves in other parts of region. Mountain chain of Little Carpathians is rich on beech and oak wood. In Nitra region there are reserves of gravel sand, wall stone and brick raw material – author's note.

¹ See: <http://www.ropka.sk/operacny-program/>

Tab. 2. Regional Gross domestic product per capita in EUR

Region/year	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bratislava	15 446.6	16 977.9	18 957.7	22 270.3	23 784.0	26 918.5	28 541.6	28 442.7	29 241.2
Trnava	6 844.1	7 874.2	8 852.0	9 895.6	12 427.0	13 675.3	14 196.7	12 928.1	13 633.7
Trenčín	6 254.9	6 946.3	7 770.6	8 081.4	9 536.8	10 502.7	11 220.5	10 265.0	10 744.5
Nitra	5 786.7	6 546.5	7 416.3	8 125.9	8 755.7	9 509.0	10 495.2	9 928.3	10 077.6
B. Bystrica	5 912.0	6 484.3	6 909.9	6 565.4	7 536.9	8 450.2	9 329.9	8 425.3	8 973.6
Žilina	5 591.9	6 037.7	6 792.8	7 536.8	8 270.2	9 553.2	10 790.2	10 037.7	10 746.4
Prešov	4 237.2	4 577.8	5 021.7	5 384.6	5 583.0	6 259.0	7 268.0	6 654.0	6 860.7
Košice	6 175.5	6 706.4	7 392.4	7 720.7	8 599.0	9 361.6	10 194.2	9 021.8	9 580.6
Slovakia	6 843.1	7 549.6	8 390.6	9 154.3	10 202.6	11 386.8	12 381.4	11 609.1	12 130.7

Source: Regionálny hrubý domáci produkt na obyvateľa v Sk, Štatistický úrad Slovenskej republiky.

There are 22 national nature reservations, 70 nature reservations, 45 natural monuments and 87 protected areas and one national natural monument. Both regions are rich in cultural and historical monuments, urban conservation, and folk architecture reservation. The city of Nitra in Slovakia is the town with the oldest written record from year 826. Both regions thus have something to offer in the development of regional tourism services (Nitriansky kraj – charakteristika regiónu, 2013; Trnavský kraj – charakteristika regiónu, 2013).

In the demographic comparison the Nitra region with its 689,564 inhabitants as of 31.12.2011 ranks the fourth place among the regions in the Slovak Republic, with a share of 12.8% of the nationwide total. From the total population 51.5% are women. With a population density of 111.1 inhabitants per km² is the fifth most populated province in the country. Nitra region has 354 municipalities, of which 15 have city status. 317,435 inhabitants lives in the cities, what is 46% of the total population. Trnava region has 555,509 inhabitants as of 31.12.2011 it is the smallest from all regions and its representation in the total population of Slovakia is 10.3%. The region is comprised of 251 municipalities, with a concentration of 6 villages in 100 km². A significant concentration of population is in 16 municipalities with city status. 47.7% of the population is concentrated in the cities. Population density 134 inhabitants per km², ranks the region to the second place compared to others regions. Both regions are affected by changes in demographic trends. In Nitra region the tendency of slowing down the reproduction of the population and decreasing natural population growth is more significant, in 2011, the natural population growth was – 907 (Nitriansky kraj – charakteristika regiónu, 2013; Trnavský kraj – charakteristika regiónu, 2013). Comparing the economic performance of both regions, Regional Gross domestic product (at current

prices) in 2009 (see table 2), is in the Nitra region 7,009 million. EUR share on SR by 11.1%. Regional gross value added at current prices in 2009 reached 6,371 million. Euros with a share of 11.1% of the total for the Slovakia. Trnava region is one of the most productive agricultural regions (followed by Nitra region).

Based on the development of economic indicators in table. 2, we can conclude that the evolution of the GDP per capita in Slovakia is significantly regionally differentiated. In the last decade the regional disparities have deepened. In year 2010 the highest creation of GDP per capita was in the Bratislava region, which reached 241% national average. Except this region only Trnava region was above the average with (112%). In Trnava the economic situation especially in recent years greatly improved thanks to an increase in industrial production and gross production due to growth in production and supply of electricity, water and gas as well as the significant increase in prices of these commodities (Trnavský kraj – charakteristika regionu, 2013).

Both regions are the most important producers of crops such as wheat, barley, grain maize, edible peas, sugar beet, rape seed, sunflower seed for seed, oil bearing plants, grain legumes and grapes⁵. Following the primary agricultural production the production of foods (milk and dairy products, meat and meat products, sugar, confectionery and sparkling wines) is developed. Plant production is complemented by livestock production, with a significant share livestock, poultry and pigs (Nitriansky kraj – charakteristika regiónu, 2013; Trnavský kraj – charakteristika regiónu, 2013).

Types of industries in both regions is varied, but unevenly distributed territorially. Other core

⁵ Gross agricultural production of Nitra region presents 30.2% of Slovak production – author's note.

industries in the Nitra region include electrical machinery, food processing, chemical and rubber industries. The district Sala there are important chemical plant Duslo.a.s., which processes natural gas and produces nitrogen fertilizers and rubber chemicals. A significant proportion of the Trnava region is a manufacturer of computer, electronic and optical products and motor vehicles. The most important industrial undertaking active in the automotive industry in the Trnava region is PSA Peugeot Citroen (Hospodársky vývoj v regiónoch SR (analytická časť), 2013). Among the major sectors are also fabricated metal products production of machinery and equipment, production of chemicals and chemical products, production of basic metals, production of basic pharmaceutical products. The region has created a dense network of equipment wholesale and retail trade, repair of motor vehicles and motorcycles, which undertook to 31.12.2011 27.8% of the total number of enterprises aimed at generating profit and 20.4% of the number of entrepreneurs in the region (Trnavský kraj – charakteristika regiónu, 2013). In addition, legal entities aimed at generating profit undertook business in professional, scientific and technical activities, in manufacturing and in construction and natural persons in construction and manufacturing.

According to the program of cross-border cooperation between Slovak Republic and Czech Republic Trnava region is one of the largest industrial agglomerations, contributing to higher employment and economic growth in the region. This fact is apparent, inter alia, from the favorable geographical

location of the border region near the capital, good infrastructure and the possibility of getting funds from a number of cross-border cooperation programs. Especially the last two mentioned factors – infrastructure development and cross-border cooperation and the associated tourism – are according to authors of the article supported by finance from EU funds for regional development and thus also contributed to the growth of the region. Nitra is behind Trnava region in industry because in its territory, except Duslo Šala there are no large industrial companies and the region has always had a rather agricultural character. Region drew EU funds especially in the development of road infrastructure and education, but failed to capitalize these investments in terms of generating direct investments and building industries and new jobs. The truth remains that most roads in the Nitra region are not connected to the main transport roads, which primarily affects the southern part of the region. Given the Nitra region higher unemployment and lower economic growth compared to the Trnava region and the population, real wages are lower. Nevertheless, both regions, drawing on their position near Bratislava and thanks to the spending of EU funds for infrastructure development are compared with the other regions of Slovakia to those more developed (Nitriansky kraj – charakteristika regiónu, 2013; Trnavský kraj – charakteristika regiónu, 2013). In terms of spending of EU funds according to the following studies of Conservative Institute M.R. Štefánika shown in figure 1 shows that the Trnava region has been more successful in spending of EU funds in comparison with

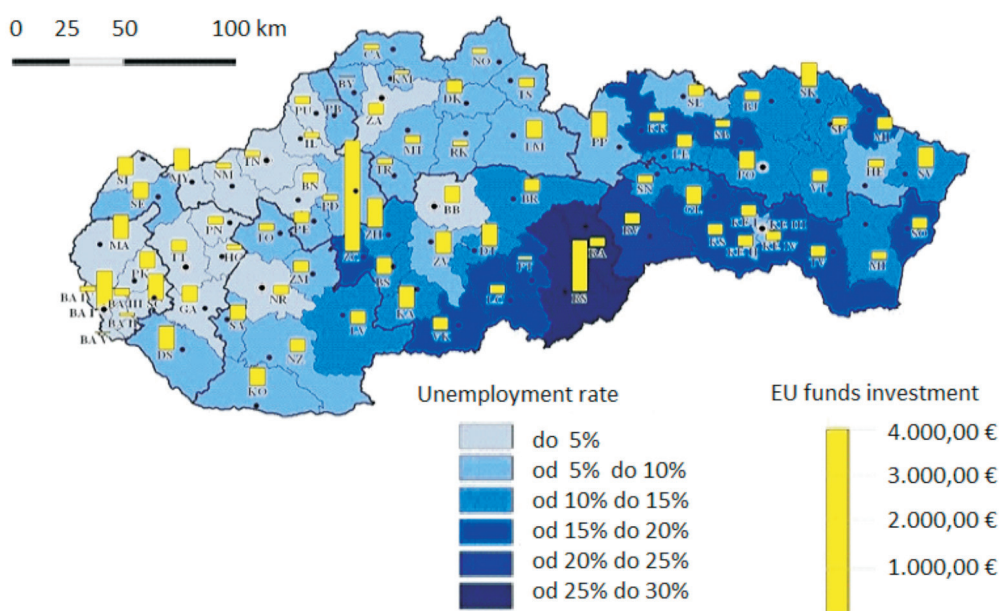


Fig. 1. Redistributing EU Funds in Slovakia to 31.5.2009

Source: Čerpanie štrukturálnych fondov, Kohézneho fondu a Európskeho fondu pre rybne hospodárstvo k 31.12.2013.

Nitra region, which was reflected in the growth of all economic and social indicators (Čerpanie štrukturálnych fondov, Kohézneho fondu a Európskeho fondu pre rybné hospodárstvo k 31.12.2013). On the other hand, the authors of the study indicate that the spending of EU funds don't contribute to balancing the regions, which is their main goal, and the largest recipients of investment in the Slovak Republic remain at low levels of development. The authors of this article agree with those postulates, but stresses the fact that the condition is mainly caused by the inefficiency of using investments from EU funds. Directly responsible for this are the recipients in the mentioned regions. The authors are inclined to the opinion that the effective use of EU funds in the Trnava region is an example of successful regional development support.

With respect to regional, respectively EU structural policies, both regions are eligible for Objective 1 – Convergence, which focuses on job creation at NUTS 2 level; as well as under the Objective 3 – European territorial cooperation, which aims to promote cross-border cooperation at local and regional projects on the NUTS 3, where both regions can act independently. Both regions as well as have the possibility to co-finance projects from the Cohesion Fund in areas such as environmental protection and development of infrastructure, especially the road network.

When comparing the transport infrastructure, we can conclude that both regions are well connected by roads, so important for both national and international transport. The territory of Nitra region crosses international main-line railways. In the town of Komárno is located an important river port on the Danube River, which is connected to European river highway Rhine – Main – Danube. The territory of the Nitra region is crossed by important pipes. The most important gas transit and interstate pipelines are the Družba and Adria. Also in the Trnava Region road, rail and water transport is well developed. But its extra advantage is that that it is passed with important road routes from Bratislava through Trnava to Žilina and from Hodonín through Trnava to Nitra. The rail transport is strongly represented in this region, since its passed by routes Bratislava – Žilina and electrified single track line Trnava – Galanta and Trnava – Kuty, which extends south railway line towards the Czech Republic. Importance is the track Bratislava – Galanta – Štúrovo. Construction of Gabčíkovo significantly improved navigation conditions on the Slovak section of the Danube (Hospodársky vývoj v regiónoch SR (analytická časť), 2013).

Both regions are comparable to the analysis of data drawn from the Statistical Office of the Slovak Republic and in education, as in the whole territory

of both regions is well established dense network of preschool and school facilities. In almost every major village is situated primary school providing compulsory education. In both regional capitals occupied by two universities – in Nitra is the Slovak University of Agriculture and Constantine the Philosopher University. In the town of Komárno seats Selye University. In Trnava it is the Trnava University and the University of Ss. Cyril and Methodius. Trnava guests also one faculty of Slovak Technical University – Faculty of Material Sciences. In addition, in the Trnava region, there are two private universities - the University in Sládkovičovo and the Central European University in Skalica (Nitriansky kraj – charakteristika regiónu, 2013; Trnavský kraj – charakteristika regiónu, 2013).

In the area of culture both regional capitals Nitra and Trnava have a long tradition. Nitra is deemed one of the most important centers of Slavic education, culture and the Christian life. The development of culture are going back to the early settlement of the ancient Slavs and continued in the first state formation Pribina Principality of Nitra and Great Moravia during the Middle Ages until modern times. The region has seven theaters, two galleries including branches and 307 public libraries, including branches. Attention deserves Andrej Bagar Theatre in Nitra, Nitra Museum and Nitra Gallery. In recent years, in addition to traditional agricultural exhibition AGROKOMPLEX, also fairs and exhibitions such as Automobile, Furniture and Living, International Engineering Fair, Lignumexpo and others are organized in Nitra. Theater tradition in the Trnava region represents Trnava Theatre. A significant role is the film art that promotes extensive network of permanent and natural cinemas. Historical and cultural monuments are exhibited in galleries and museums, most exhibits presents Western Slovakia Museum in Trnava. Educational activities provide cultural and educational institutions, leisure Art Ensemble and facilities on a special interest-educational activities (Nitriansky kraj – charakteristika regiónu, 2013; Trnavský kraj – charakteristika regiónu, 2013).

It follows that both regions have comparable resources and opportunities for regional development and the alleged facts constitute a great potential to develop tourism travel, which would ultimately lead to development in all areas of the regions. However, given the uneven distribution of the two regions, Nitra greater is faced with structural problems. If, in the Trnava region was achieved in September 2014 unemployment rate of 8.32%, in the Nitra region was up 11.30%. Trnava Region has the second lowest unemployment rate (9.81%) ranked after the Bratislava region (6.22%), as fig. 2 shows.

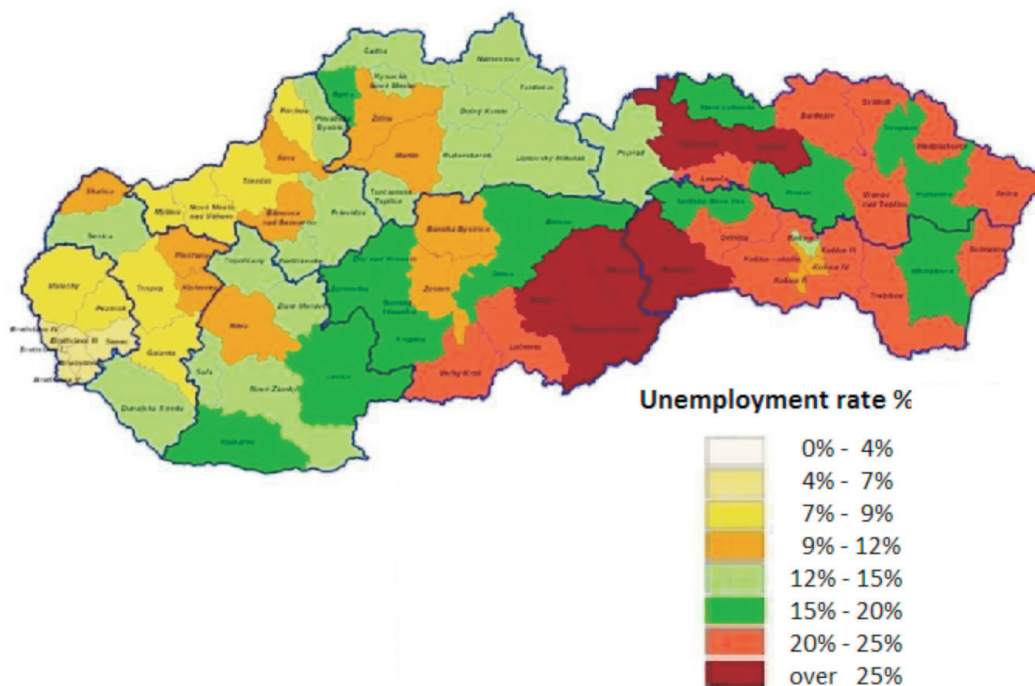


Fig. 2. The Registered Unemployment Rate in Slovakia to 30.6.2013.

Source: Nezamestnanosť, 2013.

Thanks to the spending of EU funds, both regions improve innovation, which is confirmed by the Regional Innovation Scoreboard from 2014 (Hollanders, Es-Sadki, 2014), which both regions classified as a moderately developed regions. During the reporting period from the Slovak Republic into the EU progressed from underdeveloped regions in 2006 to slightly develop in 2008 a position have still maintained the economic growth to 2.5% in this area. From the Slovak Republic only Bratislava region shows full progress in the use of European support for innovation and thus ranked as the most advanced regions of the EU. It is not possible to compare the level of the monitored region since most evaluation reports of the European Commission classifies Trnava and Nitra, as mentioned above, in the category of Western Slovakia (SK02) and predicts a similar development on its entire territory. The data can be misleading especially in terms of assessing the Nitra region, because in this category it is a part of the Trenčín and Žilina region that are assessed as most industrialized areas of the Slovak Republic according to the Ministry of Agriculture and Regional Development.

The graph shows that the area of regional development is in second place in the spending of EU funds behind the health sector in the Slovak Republic in the overall disbursement rate of 70%. Of the total commitment of 2007–2013 in all 14 operational programs Slovakia exhausted the resources till 31.08.2013 at 44.63%. The level of spending over

50% of total commitments reached in 2007-2013 Operational Programme Health (80.88%), Regional Operational Programme (65.86%), OP Employment and Social Inclusion (56.80%), Operational Programme SR-CR 2007–2013 (56,22%) and the Operational Programme Fisheries (50.63%). In terms of spending of EU funds Slovak Republic lags globally, therefore the Committee on Regional Development of the European Parliament adopted in December 2013 amendment no. 1297/2013 which enables us together with Romania, the possibility for using the funds for a longer period (Výbor europarlamentu schválil Slovensku dlhšie čerpanie eurofondov, 2013).

Nitra regional government (NSK) has registered 71 projects within the ROP, of which 23 were approved, representing a non-repayable grant totaling 26,442,401, 75 euros. The other two projects were prepared by the OP Information Society, the project „Digitalization services Nitra regional government“ and the project “The most important archeological and historical monuments in museum collections of Nitra regional government“. Within the OP Environment regional government implemented a project to improve air quality in the Nitra region on which 10 cleaning mechanisms for regional communications were bought. Other completed projects were funded from other sources of EU and Norwegian Financial Mechanism. In 2008, the Ministry of Construction and Regional Development has authorized Nitra regional government to implement three measures

of the Regional Operational Programme to support the infrastructure of tourism, regeneration of settlements and regional roads. To carry out these tasks, regional government created the Intermediate Body under the Managing Authority for the Regional Operational Programme (IB / MA for ROP), which contracted and managed proper implementation of 129 approved projects of applicants from Nitra. Until the June 30, 2013 107 projects were completed. The total value of approved eligible expenditure is 98 689 703.37 euros (Nitriansky samosprávny kraj v 3. volebnom období 2009–2013, 2014). In the years 2010–2013 NSK spent on maintenance and repair of roads II. and III. Class 37 878 thousand euros from current funds and 13 876 thousand euros in capital expenditure, of which there were 9 899 thousand euros from the Regional Operational Programme. Overall, the total reconstructed or repaired roads in length of 129 km and 1 146.6 m² of bridges, of which from the ROP nearly 88 km of roads. In 2011, NSK has been settled – together with the town Stará Tura, as the best among all governments in the transparency and quality of obligatory disclosure agreements (Nitriansky samosprávny kraj v 3. volebnom období 2009–2013, 2014). Trnava regional government has no comparative report on implementation of regional programs with a summary of projects and finances amounts. The situation is comparable to the rest of Slovak regions, there the implementation of EU funds forms 80% of public investments to all areas.

5. Conclusion

An analysis of the documents shows that the effective use of structural funds, which is a prerequisite for the development of regions is needed in the first place consistently and correctly define the most fundamental problems of the regions. On base of this analysis is then necessary to prepare a National Development Plan, which report shall contain the specific problems of each region. The problem is that the success of the application of regional policy in a very significant extent depends on political decision-making, which manifests itself mainly in Non-approval of individual projects, which are some applicants repeat successful, others not. Why do you think? Thus, a major problem is corruption.

Another problem is the overall set of funding, when you some regions, authorities, municipalities and other eligible applicants cannot afford to co-finance the project as envisaged principle of additionality – i.e. by taking part in the financing of 50% and 25% and 15%. The problem is also administrative complexity of a project. Often projects are scrapped because of banal misspellings. For these reasons Slovakia represents one of the EU countries with the lowest EU funds withdrawal (85,3%, by the EU-28 average of 88,3%), as fig. 3 shows to us.

According to presented study we have to conclude the Trnava region has been more successful in spending of EU funds in comparison with Nitra region, which was reflected in the growth of all

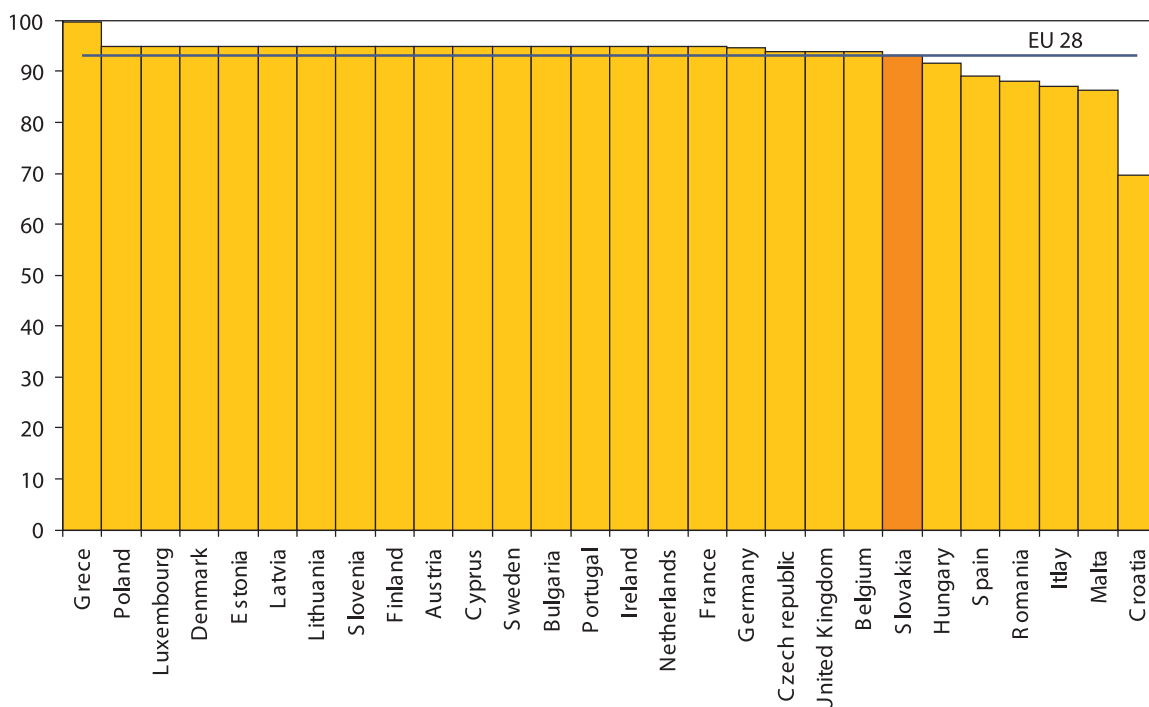


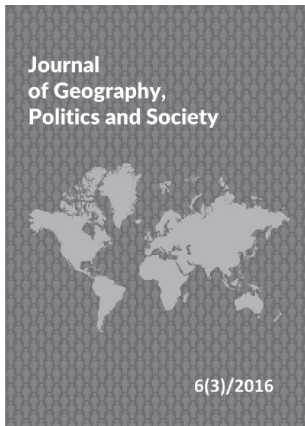
Fig. 3. Total Percentage of Available Funds paid Out by the Commission 2007–2013

Source: Cohesion Policy Data, 2016.

economic and social indicators. To better position and condition of Trnava region contributes also fact, that Trnava can withdrawal more cross-border projects and is closer to the capital city of Bratislava and the most developed core of Slovakia. On the other hand, the authors of the study indicate that the spending of EU funds don't contribute to balancing the regions, which is their main goal, and the largest recipients of investment in the Slovak Republic remain at low levels of development. The authors of this article agree with those postulates, but stresses the fact that the condition is mainly caused by the inefficiency of using investments from EU funds. Directly responsible for this are the recipients in the mentioned regions. The authors are inclined to the opinion that the effective use of EU funds in the Trnava region is an example of successful regional development support.

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IS THE SYKES – PICOT AGREEMENT OF 1916 WAS THE BASIS FOR THE POLITICAL DIVISION OF THE MIDDLE EAST?

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Abstract

In 1916, Britain and France signed an agreement deals with the future division of the Ottoman Empire. This agreement, known as the Sykes – Picot Agreement, after its two designers, the British Sir Mark Sykes and the French François George Picot, is seen up today as the main act which created the modern Middle East and responsible for some of its problems. The article present here point to another act, the decision of the newly established League of Nation to create the Mandate System and , following it, the San Remo decision of April 1920 giving the Mandates concerning the Arab Middle East to France and Britain, as the main designer of the division of the Middle East to its present form.

Key words

First World War, Ottoman Empire, League of Nations, Britain, France, Mandate System.

1. Preface

Lately, especially in light of the events of the past five years in Syria and Iraq, popular as well as scientific publications, as well as political groups and leaders, wrote and mentioned the agreement signed a hundred years ago, in May 1916, between the representative of the British Empire, Sir Mark Sykes, and the French representative, Francois Georges –Picot concerning the future of the Middle East¹. All considered the “Sykes – Picot Agreement” as the base for

the creation of the political map of the Middle East divided for several independence states which exists today in that area. More new information to this ‘known’ agreement was supplied in a book called “A Line in the Sand” (Baar, 2012) written by the journalist and political analyst, James Barr, published in 2011 (American Edition 2012). According to the overall public opinion, this agreement between the governments of Britain and France created the existing political structures of the Middle East – a structure that the Muslim State (ISIS) tries to abolish. ISIS declared that the boundaries of the Sykes – Picot

¹ See for example – The Sykes – Picot Agreement at 100, YouTube discussion of 2 hours, 26:24 minutes. Also see – Rethinking the map of the Sykes – Picot Agreement Legacy, BBC World YouTube.

Agreement are void and null², tried to abolish the separate Arab states units, and bring back the Middle East to the situation in which there were no borders separating and disintegrate the Arab world – the Muslim Middle East. James Barr's book reinforces this argument and tries to show that the "Line drawn in the Sand" drowned on the map attached to the agreement, put the Middle East as a conflict area between France and Britain struggled for control of the territory after the fall of the Ottoman Empire, hence the root of the ongoing conflicts in the Middle East. Moreover, from this stems the notion that Middle Eastern countries, with the possible exception of Turkey and Israel, are being artificial and unnatural, never been established according the frame of the "nation-state idea".

Is that right? It seems that a historical research, which is based on original documents and previous studies, which try to examine what happened during the years 1914–1920, without preliminary views, present a slightly different picture.

2. Background

In the Eve of World War I the Ottoman Empire controlled the entire area currently defined as the Middle East (but not independent Persia – now Iran), with the exception of Egypt, which was officially still under the sovereignty of the Ottoman sultan but actually was, since 1882, control by the British empire. The accession of the Ottoman Empire in the Great War (WWI) alongside with the Central Powers (Germany, Austria-Hungary and Bulgaria) against the Allied (Entente Cordial) Powers (Britain, France, Russia and Serbia later joined by Italy, Greece, Portugal, Rumania and the USA), which took place mainly in Europe but also in the Middle East (and even in central Africa) brought about discussions between these powers concerning the future of the Middle East. An Ottoman – Germany victory would leave the situation as it is, under the authority of one empire – the Ottoman, but a victory of the Allied Powers could bring into the creation of a new Middle East. Pre-war Great Britain held diplomatic outposts in the Middle East, in Egypt, Cyprus and Aden, and held a series of agreements with Arab sheikhs along the Persian Gulf. France had religious, trade and political interests on the east coast of the Mediterranean, particularly in Syria, Lebanon and Palestine. Thus France sought to achieve influence and control over the Christian holy places in the Ottoman Empire

(especially in Palestine – the Terra Sancta) and to secure control all over the area from the Egyptian border – a line set in 1906 – as far north as Aleppo in Syria and the Gulf of Alexandretta (Iskenderun, today in Turkey) and in the area of Mosul in northern Mesopotamia (now Iraq). In contrast, Britain sought to strengthen its Persian Gulf positions and extend its control to the north of Mesopotamia, where she hoped to find oil³. In Western Middle East Britain look for Palestine, due to activities which took place in the course of the war itself. Attempts to attack the Suez Canal "The life line of the British Empire", by the Ottoman army (with German encouragement and planning), although twice failed, made it clear to Britain that the Sinai desert is no longer a buffer in the age of modern war, aided by railroad and motor traffic by land and airplanes. Crossing the desert barrier became more easily. It became clear to Britain that a modern military force located in Palestine is a constant threat to the Suez Canal, a waterway vital to the British Empire. Britain sought therefore to expand the actual power and control to all the territory between Palestine and Mesopotamia from Egypt in the west, up to the Ottoman – Persia boundary, demarcated in 1914, in the east. Britain wanted to get this area in order to ensure direct contact between the Persian Gulf and the Mediterranean by continental railroad, roads and oil pipelines (Frieschwasser-Raanan, 1955). Tsarist Russia had no territorial ambitions in Palestine and focused its ambitions in other parts of the Ottoman Empire – the area of Istanbul, the Bosphorus and Dardanelles Straits, and parts of eastern Anatolia and Armenia. The Italians, who had occupied the territory of the Ottoman Empire in Libya and some islands in the Aegean Sea, (The Dodecanese Islands) just before the War, asked for international approval of their control in these areas, as well as controlling some areas in central Anatolia. Russia and Italy as well as Britain, refused to accept that only one European power (France) and one Christian faith (The Catholic Church) will rule the holy places in Palestine. Those conflicting ambitions of the Allied countries, formed the basis for discussions on a possible partition of the Ottoman Empire, if the War will end in the collapse of it. Thus, immediately upon the outbreak of war, after the Ottoman Empire joined the Central Power in 31 October 1914, France demanded for herself Syria, including Lebanon and Palestine. Russia, the closest ally of France, tended at the beginning to agree to this request but later Russia withdrew its support for this demand because of the reluctance to see a Catholic control

² Melisa Ruthven, *The Map ISIS Hates*, The New York Reviews of Books, 25 June 2014.

³ On the rival between Britain and France in the Middle East see Y. Nevakivi (1969) and E. Monroe (1963).

of the holy places in Palestine, where the Russian Orthodox Church had also interests and properties.

In March 1915 the French government asked officially Russia to accept French future control of Syria and Palestine at the end of the war, but the Russians rejected the French demand for the control of the holy places in Palestine, and to do so, Russia enlisted the help of Britain. The British government was not prepared to formally discuss the future of the Ottoman Empire before the latter defeated, but the British Cabinet set up, in April 1915, a committee of experts headed by Maurice De – Bunsen, to discuss the British interests in the Middle East⁴. France, which faced Russian opposition and non cooperation from Britain concerning its ambitious demands, withdrew from those demands and place a demand to control Syria, Lebanon and only part of Palestine but suggested the internationalization of the holy cities of Jerusalem and Bethlehem. The Russians claimed that the holy places in Palestine also include Nazareth, the Galilee and the Sea of Galilee, and they were not willing to let the Catholic Church a control in these places. While France and Russia discussed the future control over the holy places, Britain found herself facing the Ottoman – German threat on Suez canal, and therefore demanded that all the territory of Palestine, from Haifa to Aqaba, will become a Neutral Territory according to the suggestions of the De – Bunsen committee, as well as allocated the Alexandretta area to Britain. Thus Britain and Russia stood against the French claim to control Palestine.

3. The Sykes – Picot (and two other partners) Agreement

These conflicting ambitions and the entry of additional plaintiffs for the territory of the Ottoman Empire – the Zionist movement on the one hand and the Arabs on the other – resulted in the opening of formal discussions between France and Britain over the future of the Middle East. These discussions began in October 1915. Britain was represented by Sir Arthur Nicholson, and later replaced by Sir Mark Sykes. James Barr describes in detail how well Mark Sykes enters the discussion and how he achieve a central place in it. Barr also describes in detail the stands of the French discussant, Francois Georges-Picot. After five months of discussion, an English–French agreement, known as the Sykes – Picot Agreement, was signed by the British and the French .foreign secretaries in March 1916, dealing with the division of the

Ottoman Empire after the war. In accordance with the terms of the agreement, which was later joined by Russia and Italy, France was due to have direct control over most of the eastern shore of the Mediterranean Sea, from Rosh Hanikra in the south to Alexandretta golf in the north and the great Syrian – African rift in the east. In addition, she was supposed to directly control Cilicia, the south Asian region of Anatolia. The French control area was painted by blue color on the map that accompanied the original agreement. As concerning Palestine France was supposed to have complete control of the area from Rosh Hanikra to the Sea of Galilee, including the Upper Galilee region, with the city of Safed, Hula Lake and the northern part of the Jordan River (fig. 1).

In addition to this area France was due to help run an independent Arab state, which was supposed to stretch from the Great Rift Valley in the west and from the Yarmouk River in the south, to the foothills of the Zagros Mountains in the east (The pre-war boundary between the Ottoman and the Persian Empires) including Mosul area in northern Mesopotamia and to the Taurus mountains in the north. This area, which included the Golan Heights, Horan and the Druze Mountain, was due to become an independence Arab state, in the France’s sphere of influence. This area was marked on the map (fig. 1) as zone A.

Britain, the other senior partner in this Agreement, whose ambitions were mainly located in the eastern region of the Persian Gulf, was supposed to have full control over the southern and central Valley of the Tigris and Euphrates rivers, from the city of Baghdad south to the Persian Gulf coast and along this coast southward. Britain was supposed also to control the Haifa Bay, the cities of Haifa and Acre and the area of the valley between them. This was due to Britain’s desire for the construction of a deep water port in Haifa that will be used in the future as the oil pipeline terminal and railroad connecting the Rivers Valley to the Mediterranean Sea. Those two areas were painted with red color on the attached map (fig. 1). There was no territorial link between the two areas of British control, but between them another Arab state was supposed to be established, which was due to stretch between the 1906 boundary line of Egypt in the west to the Persian Gulf in the east. This area, which was due to be in British sphere of influence, was marked on the map (fig. 1) as zone B.

Russia and Italy were jointed to the agreement. Russia was due to control a large area in eastern Anatolia, included Armenia (yellow color on the map), while Italy was to get the official control of the Aegean Sea islands occupied before the war, (Rhodes and the Dodecanese islands), as well as area in central

⁴ Document „Secret“ A220 D.I.C. from 30 January 1915, file CAB 1/27 in British Archive P.R.O.

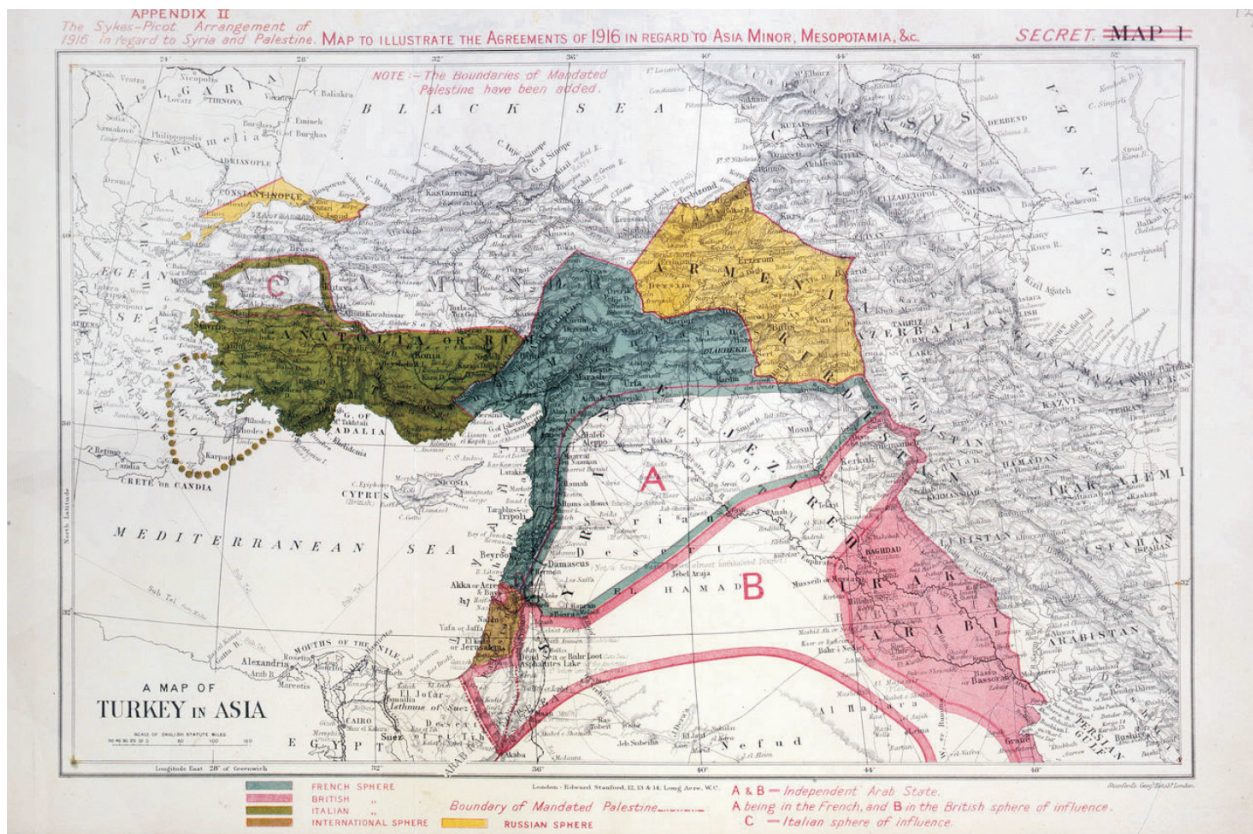


Fig. 1. Sykes – Picot Agreement map with French, Britain, Russia and Italy control and sphere of influence areas
Source: The British Archives P.R.O.

Anatolia (green color on the map (fig. 1) as well having an area which due to be in the Italian sphere of influence (Marked C on the map (fig. 1)). The desire for controlling the holy places in the Holy Land, led to the creation of a neutral zone in Palestine, which was supposed to be managed jointly by Britain, France, Russia, Italy and a representative of the Arab – Moslem world. This area, known in the literature as the “international area” was painted by brown color on the map. This area was delimited around the holy cities of Jerusalem, Bethlehem and Nazareth at the center, and all the area included in a line runs from Rosh Hanikra to the north west of Sea of Galilee, included Capernaum) on the shore of the Sea. From there the line run along the Jordan River as far south as the Dead Sea, then westward toward the Mediterranean Sea, south of the city G (fig. 2).

The very small scale of the map, 1:2,000,000 as the discussion was made regarding all areas of the Middle East, not about Palestine apart, later created some difficulties to the exact location of the line on map with larger scale (Biger, 2003).

4. The meaning of the Sykes – Picot Agreement

The Sykes – Picot Agreement as presented here was partly in contrast to the agreement achieved between Britain with the Arabs discussed early in 1915, promising the Arab Hashemite Sharif Hussein a total independence Arab state in the whole Arab Middle East, but not the area west of the great cities of Syria (Aleppo, Homs, Hama and Damascus). It is also stand in contrast to the 1917 Balfour Declaration in which Britain promised to support the establishment of A Jewish National Home in Palestine.

Anyhow, in a first sight, and as such it was first present to the world by the Bolshevik authorities back in 1918, it appears that the Sykes – Picot Agreement is an example of dividing the world by imperial powers irrespective of terrain or the will of local residents. Such divisions have characterized the international politics during the nineteenth century and up to the War, and can therefore be seen herein as the culmination of the Imperial process. However, this agreement can also identify new elements, and perhaps the beginnings of a new policy.

The agreement initially recognized rights of the residents of the areas to be independent. The idea of establishing two independent Arab states, albeit under the auspices of imperial powers but with the

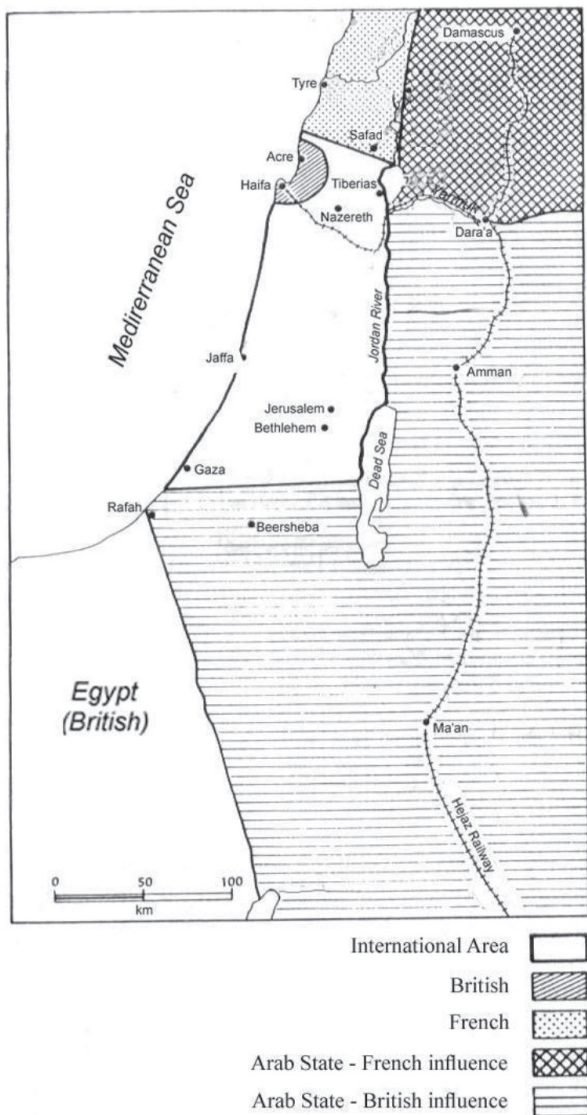


Fig. 2. Palestine according to the Sykes – Picot Agreement
Source: Author own map.

definition of an independent state, was certainly an idea that never appeared before in any partition set by world powers. This idea was, perhaps without referring to its drafters and perhaps due to recognition of the emerging international system, a new ruling from which will continue to influence global policy, i.e. – the principle of self-determination, although still under the auspices of the superpowers, but in a new way. In the Wards of the Agreement: “1. That France and Great Britain are prepared to recognize and protect an independent Arab State or a Confederation of Arab States in the areas (A) and (B) marked on the annexed map, under the suzerainty of an Arab chief. That in area (A) France, and in area (B) Great Britain, shall have priority of right of enterprise and local loans. That in area (A) France, and in area (B) Great Britain, shall alone supply advisers or

foreign functionaries at the request of the Arab State or Confederation of Arab States”⁵.

According to many scholars, among them also the author of “The line in the sand,” There is but a continuation of the policies of the past, but this view does not explain why certain parts of the division of the Ottoman Empire were to be British, French, Russian and Italian, while other parts were supposed to be Arab independent states, although in European spheres of influence. More ever, this agreement also present for the first time the idea of joint international control over space containing holy sites of religious importance for the Christianity and the Islamic faiths. A similar idea was held on the eve of the war in the city of Tangier in Morocco, but there, political and economical reasons were behind it. Thus the agreement proposed for the first time a Joint International control for the regime which was due to govern Palestine. From then on, this idea continued to be suggested, in one form or another, in subsequent programs of partition presented during the British Mandate period in Palestine, before the formal establishment of the State of Israel. The idea which was rose in our days in order to create an “international space” in the “Holy Basin” of Jerusalem is the direct result and continuation of an idea proposed by the Sykes – Picot Agreement.

5. The demise of the agreement

The agreement between Britain and France which was signed due to the constraints of the War, did not fulfilled the requests of the signatories, and each side sought to attract the terms of the agreement to its benefit. The agreement was a confidential one, not being published publicly, and only the relevant governments know about it. However, Tsarist Russia, which was a one of the partner of the Sykes – Picot Agreement, underwent a revolution when the Communists took over the country in late 1917. The new regime revealed the Agreement and released it publicly in order to show the evils of the imperialist powers. The Soviet Union announced its withdrawal from the agreement (fig. 3).

This measure eliminated from the Agreement. By this, the agreement lost its legal validity as one of its members abolished his participation in it. More ever, at the same time (late 1917 to September 1918), the Egyptian Expeditionary Force – the military power of

⁵ Sir Edward Gray, British Foreign Secretary to Paul Cambon, French Foreign Secretary, 16 May 1915, in British WWI Document Archive, Official Papers, Sykes – Picot Agreement, 15&16 May, 1916.

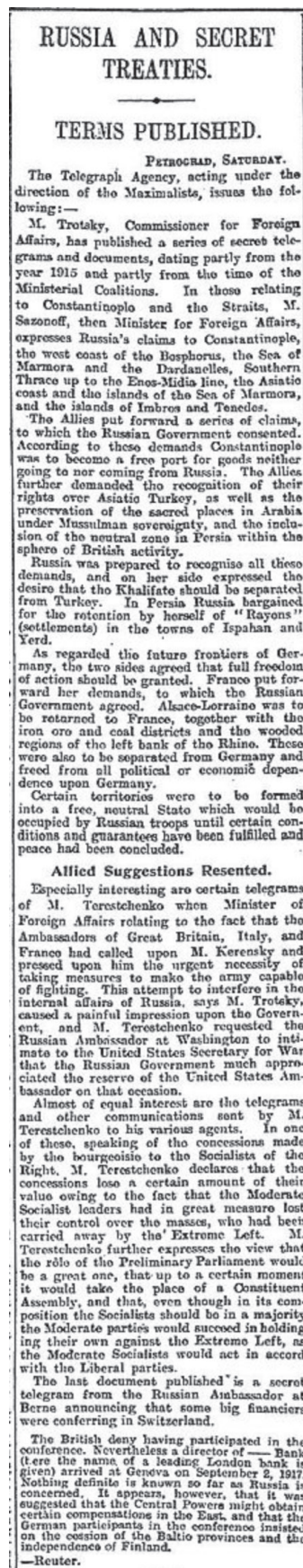


Fig. 3. Newspaper publication about secret treaty in Manchester Guardian, after Soviet Russia Commissioner for Foreign Affairs, M. Trotsky.

Source: The Manchester Guardian, November 26, 1917, 5.

the British Empire led by General Allenby in the West Middle East, occupied Palestine and Syria. Another British expeditionary force captured Mesopotamia – the East Rivers Valley. Thus, when the War was ended, in November 1918, Britain ruled over all the areas designated for partition according to Sykes – Picot Agreement of 1916, except North Eastern Anatolia which was intended for Russia. Shortly after the British military journey along the eastern coast of the Mediterranean, in October 1918, General Allenby organized the occupied area into three administrative subdivisions called "occupied enemy territory."⁶ Thus, "The Southern Occupied Territory" included the districts of Jerusalem, Nablus and Acre and was put under the command of a British General. "The Northern Occupied Territory" (later called "Western"), which included the districts of Beirut, Lebanon, Latakia, Antioch and Alexandretta Bay, was placed under the command of a French Colonel. The third area – "The Eastern Occupied Territory" included all the region east of the areas mentioned above, and was placed under the command of an Arab officer, Gen. Ali Reza Al-Riqabi. This act was based mainly on the division of the territory according to the lines of the Sykes-Picot agreement, with one key difference. Palestine, the area designed to be placed under international regime, was placed under the command of a British officer. This was the first significant deviation from the agreement. Not only had these acts changed the meaning of the Agreement. Even before, when United States joined the Allied Forces in 1917, its president, Woodrow Wilson, presented his 14 points determination of the US war's goals. One of the points dealt with the idea of non – annexation of occupied areas after the War, another dealt with the independence of the Arabs in the Middle East (Manuel, 1949). Britain and France agreed to accept the American principles, and by this, they waived the Sykes – Picot Agreement which allocated areas for British and French control in the Middle East. The League of Nations which was established in the 1919 Paris Peace Conference, intended to deal with the future of the world after the War, tried to fulfill the idea of self – determination. Thus new states were established in Europe based on this principal (Finland, Estonia, Latvia, Lithuania, Poland, Czechoslovakia, Yugoslavia) in the areas of the defeating empires. Anyhow it also claimed that "with regard to those colonies and territories which as a result of the recent war ceased to stand under the sovereignty of states ruled them before, populated by people who are not yet able to stand by themselves under the

⁶ Allenby to War Office, telegram A.W. 1808, 23 October 1918, in File WO/101/71 in the British Archives P.R.O.

difficult conditions of the modern world, we must act according to the principle that the welfare and development of the member nations concerned are a sacred trust of civilization”⁷. It was also stated that “custody of these people will be entrusted to advanced nations.” As for the Middle East the League of Nation declared that “certain committees, belonging to the Turkish Empire, reached the rank of development where we can recognize the existence of independent nations, provided they receive help and advice from a government mandate, until they can stand on their own”. According to those Statements, Advance countries, Britain, France, South Africa (For areas belong to the German Empire in Africa), Australia, New Zealand, Japan (for areas belong to the German Empire in the Pacific Ocean), got the mandate to administer those area, which were called “The Mandate Areas.” Thus, the issues that were discussed during the Peace Conference were those dealing with which advance countries will get the Mandate and for which areas of the previous Ottoman Empire it will be given. The League of Nations stated that “the requests of these committees should be used as a main consideration in choosing a mandate.” Britain and France, which stood behind the Mandate idea, were the main candidates for the task to manage the new Middle East as both were empires that had extensive experience in controlling and managing overseas regions, and they had clear interests in the Middle East affairs. The League of Nations recognized the right of the self determination of various groups settled in the Middle East including the Arabs, the Christians Maronites of Lebanon,) The Armenians and The Kurds and added to them the Jewish People because of their historical rights to the Holy Land, though actually they were not settled (but in minor number) in Palestine at that time. The Maronites and the Jews gladly accepted the offer to manage them by the French (Maronites) and the British (The Jews) while the rest of the peoples of the region, and especially the Arabs, have expressed their desire for the management of a modern superpower that hold no interests in the Middle East, i.e. at that time, the United States (Documents..., 1946). Anyhow, the new regime in United States (President Wilson ended his presidency in 1920) halt its actual activities in the Middle East partly because its reluctance to be involved in that area and partly because of the isolationist policies it adopted, which even prevent her to join the newly established League of Nations. Thus, Armenia and Kurdistan, which were due to become mandate territories under the United

States, lost that status (Armenia got its independence only in 1989, after the abolition of the Soviet Union, Kurdistan is still not an independent state). The League of Nations, according to the interests of France and Britain, decided, in April 1920, at a conference of San Remo, after lengthy negotiations, that Britain will receive a mandate to administer Palestine and Mesopotamia and France will get a mandate to the administration of Syria and Lebanon. This decision was the final act to abolish the original Sykes – Picot Agreement, although, as will be present later, parts of its boundary’s lines have affected the new boundary lines which were created in the Middle East. Britain and France had to decide where the dividing line between the areas under their management will be delimited, which they did in the 1920’s, and each of them was sovereign to draw the internal boundaries of the areas under their management. France was to determine the line between Christian Lebanon and Arab Syria, which she did in 1920 as well as to negotiate the delimitation of the new boundary between Syria and Turkey. Britain was supposed to place a line between Palestine and Mesopotamia (later Iraq), as well as the future boundary between their controlled areas and Saudi Arabia. All of those lines, established in the 1920s, but not of Palestine (now partly the State of Israel), with minor changes, are the International boundaries of the Middle East up to now. These boundaries are the boundaries ISIS wanted to abolish and not the Sykes – Picot lines.

Conclusion

Thus, The San Remo Resolution of 1920 and the later arrangements developed from it, not the Sykes-Picot Agreement of 1916, is the international act which gave Britain and the France the power to act in the Middle East, determine as they wish according to their ability, and thus created the territorial division and the border demarcation of the new map of the Middle East. The new map used only some minor sections of the lines suggested by the Sykes-Picot Agreement. Palestine, which became a British mandate territory, instead of an international area, adopted from the Sykes – Picot map only part of its eastern boundary, the line along the Jordan River. The boundary between French Lebanon and French Syria with British Palestine is differ from the Agreement’s lines, Transjordan was created entirely as a new area which did not appeared in the Agreement, British Iraq was extended far north of the Sykes-Picot line and included the Mosul area. Only the outgoing line from a point south of the Druze Mountain in Syria to the town of Deir A-Zor on the

⁷ Article 22, League of Nation Declaration. All the other citation are from this Declaration.

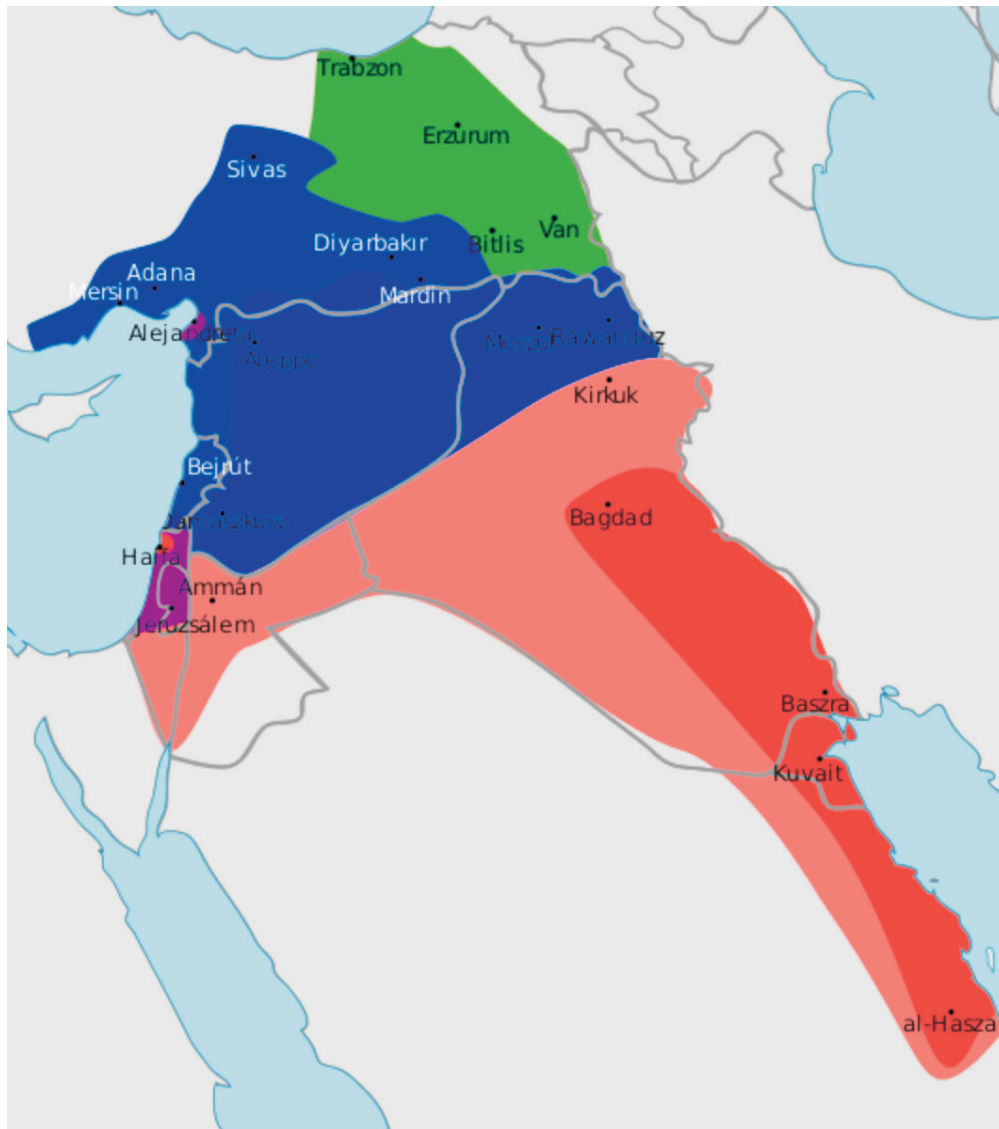


Fig. 4. Sykes Picot map and the actual map of the Middle East

Source: *A Line in the Sand*, James Barr, 12.

Euphrates River remained unchanged from the map of the Agreement.

It therefore appears that the Sykes – Picot Agreement did not “lived” too long, and “died” shortly after obtained and actually never came to realization (fig. 4). However, since the agreement became known to the world, and thus entered the history books, and partly because of extensive Soviet propaganda as to the evil of the imperialist’s activities, which was adopted by all the post colonial countries and writers, especially those which deals with the breaking of the pseudo – Arab Unity, it remains etched in the memories of statesmen, political science students and politicians of all parties, as the Agreement that shaped the territorial division of the Middle East, without having any historical or geographical true base for this.

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THE RIGHT TO TAKE PART IN THE CONDUCT OF PUBLIC AFFAIRS IN THE CONTEXT OF TERRITORIAL SELF-ADMINISTRATION

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Abstract

The paper deals with the constitutional right of the residents of municipalities and territorial units, which entitles them to take part in the conduct of public affairs within the Slovak republic. The citizens can directly or indirectly participate in sustainable development and good governance due to legal arrangements, in particular, such as the local referendum, the municipality inhabitant's assemblies, the right to petition, the right to file motions, suggestions and complaints with the municipality bodies, and etc. It focuses on the rights of the residents to comment and to be heard within the activities and actions of the municipal authorities, but not only within the administrative procedures, but also within the decision-making processes, which have the impact on the performance of their other rights.

Key words

Constitutionality, right to take part in the conduct of public affairs, the right to governance, the self-governing region, municipal authorities and territorial unit bodies, local referendum.

1. Introduction

The right of citizens to take part in the conduct of public affairs is one of the elementary political rights enshrined directly in the Constitution of the Slovak Republic (hereinafter referred to as the "Constitution"). This right is declared by Article 30 paragraph 1 of the Constitution: "Citizens shall have the right to participate in the administration of public affairs directly or through freely elected representatives," and specified by the decision of the Constitutional Court of the Slovak Republic: "In case of citizens' fundamental right to participate directly in the administration of public affairs under Article 30 paragraph 1

of the Constitution, this is one of the fundamental political rights of citizens in a democratic society, while the administration of public affairs shall mean the participation of citizens in the political life of the State, the administration of the State and public affairs in municipalities" (II. ÚS 9/2000). In the context of the execution of the administration of public affairs in the territory of self-governing units such as municipalities and higher territorial units, this right is specified by Article 67 paragraph 1: "Municipality inhabitants' assemblies shall realize a territorial self-administration by local referendum, by referendum

on the territory of the higher territorial unit, by municipality authorities or by higher territorial unit authorities.” The overall and more specific regulation of the right of the administration of public affairs in the context of self-governing units is contained in Act No. 369/1990 Coll. on Municipalities, as amended (hereinafter referred to as the “Act”) and Act No. 302/2001 Coll. on the Self-Government of Higher Territorial Units (hereinafter referred to as the “Act on Self-Governing Regions”).

2. Execution of self-administration – direct and indirect participation of entities of the right to take part in the conduct of public affairs

First of all, it is necessary to make it clear, to whom the right to take part in the conduct of public affairs in the local and regional authorities of the Slovak republic belongs. In accordance with Article 1 paragraph 1, the municipality getting together persons having permanent residence in its territory and thus the person having permanent residence in the territory of the municipality is a municipality resident (Article 3 paragraph 1). “A self-governing region is an independent territorial, self-governing and administrative unit of the Slovak Republic,” and “the resident of the self-governing region is a person who has permanent residence in the municipality in its territory”¹. The right to participate in the administration of public affairs in the municipality or the higher territorial unit is therefore not bound to the Slovak nationality, but to permanent residence, and the right to administer public affairs rests with the municipality residents who may also be citizens of other countries. In case of application of the right to take part in the conduct of public affairs, special entities within self-administration are actively legitimized that are the persons who “have their real estate located in the territory of the municipality, pay local taxes or local charges, have temporary residence registered in the municipality or enjoy the right of permanent residence in the higher territorial unit or have honorary citizenship in the municipality”², or persons who work, carry on business or pursue other activities in the territory of the municipality, stay often in the territory of the municipality, or come from the municipality and the like. These may also be legal persons

carrying on business or pursuing other activities in the territory of the municipality. The Act on Municipalities does not define these persons explicitly, but implicitly their right to participate in the administration of public affairs arises to them from the universal nature of fundamental human rights and freedoms enshrined in the Constitution. However, these persons do not have the right to vote or to be elected to self-administration bodies of municipalities and to self-administration bodies of higher territorial units and do not also have the right to vote in a local referendum, and therefore, their rights consist in the mere possibility of active participation in the form of participation in municipality inhabitants’ assemblies and meetings of the municipal council, or they may file motions, complaints, comments with self-administration bodies and thus exercise, for example, their constitutional right to petition.

In terms of Article 4 paragraph 2 of the Act, the self-administration of municipalities shall be executed by inhabitants in the form of direct or indirect democracy. The indirect form of exercising the right of citizens to take part in the conduct public affairs is the exercise of the active and passive rights to elect and to be elected members of the bodies of a municipality, which are the municipal council and mayor. The active and passive voting rights are regulated by the so-called “Election Code” (Act No. 180/2014 Coll. on Conditions of Exercise of Voting Rights and on amendments and supplements to certain acts) – the active voting right have the inhabitants of the municipality – Slovak citizens having permanent residence in the municipality who have reached 18 years of age no later than on the election day. The right to be elected as the member of the municipal council is limited only by age, namely 18 years of age. It is contrary, for example, to the age limit for the candidate for a member of the National Council of the Slovak Republic – only the Slovak citizens who have reached 21 years of age may be elected thereto. In fact, in the case of the election to municipal or self-governing region councils, there is no difference between the active and passive voting rights. However, the age limit applies to mayors or self-governing region chairmen. A mayor may be elected only a resident of the municipality who has reached 25 years of age no later than on the election day and met other specific requirements laid down by special law. Analogous provisions governing the exercise of the active and passive voting rights also apply to the elections to the bodies of self-governing regions, which are the council and self-governing region chairman.

The application of direct forms of democracy and thus the direct participation of citizens in the

¹ Act No. 302/2001 Coll. on the Self-Government of Higher Territorial Units (hereinafter referred to as the “Act on Self-Governing Regions”).

² Act No. 302/2001 Coll. on the Self-Government of Higher Territorial Units.

self-administration of municipalities can be realized in the form of a local referendum, the municipality inhabitant's assemblies or through universal constitutional rights such as the right to petition, the right to file motions, suggestions and complaints with the municipality bodies, the right to information, and the like. All universal constitutional rights directly result from the right of citizens to participate in the administration of public affairs, which is, in accordance with Article 27 paragraph 1 of the Constitution, declared as follows: "The right to petition shall be guaranteed. Everyone shall have the right to address state bodies and local self-administration bodies in matters of public interest or of other common interest with petitions, proposals, and complaints either individually or in association with others." The right to petition is also regulated by Act No. 85/1990 Coll. on the Right to Petition, as amended, which indicates that the right to address the municipal bodies with petitions, proposals and complaints in the context of the respective contribution is not only the right of inhabitants of the municipality, but of all natural or legal persons, irrespective of their permanent residence. In our opinion, the respective act only minimally regulates the right to petition in the execution of self-administration and contains only basic principles for handling submitted petitions. For example, Article 5c of the above act states: "If the subject of the petition is the activity of the local self-administration bodies, their members or the statutory body of the organization founded by the local self-administration body, the petition shall be handled by the relevant local self-administration body." In terms of Article 9 of Act on the Right to Petition, the right to petition in the execution of self-administration shall not be subject to administrative proceedings: "The general regulation on administrative procedure shall not apply to the handling of petitions under this act," but Act No. 9/2010 Coll. on Complaints, as amended, shall apply thereto, in which it is declared that "... the public authority shall regulate the handling of complaints by its internal regulations". We can infer from the context of the respective provision that the internal regulations of the municipalities or higher territorial units should then have the character of binding internal regulations governing clearly the rules for the handling of petitions or complaints and comments filed by the residents of the municipality or the higher territorial unit, and they should be published on the official boards and websites of the municipality so that the participation of citizens through the respective institute is as effective as possible.

A referendum is another important element of direct democracy in municipalities and higher

territorial units. A local referendum is regulated in the Act on Municipalities, from which it follows that in terms of the Act the municipal councils are obliged to declare the local referendum in case of "the legal merger of municipalities, the division or cancellation of municipalities, as well as the change in the name of the municipality, removal of a mayor from office, the petition of at least 30% of eligible voters, the change in labelling of the municipality or as provided by special law." The local referendum may obligatorily be declared if important issues regarding the life in the municipality and its potential further development are to be discussed. In terms of Article 11a of the Act on Municipalities, the announcement, dealing with and checking of particular documents for the application of the referendum in practice shall be the responsibility of the municipal council. Under the Act on Municipalities, details regarding the organization of local referendums shall be "stipulated by the municipality upon a generally binding regulation". Successful adoption of the results of the referendum shall be subject to the presence of at least half of the eligible voters of the municipality, and the decision which is the content of the referendum must be taken by at least an absolute majority of valid votes. The local referendum carried out in the territory of self-governing regions is governed by Article 15 of the Act on Self-Governing Regions, which defines the requirements of the announcement and the conduct as well as validity of the referendum, which, in terms of grammar, can be described as almost identical compared to the requirements of validity of a local referendum in a municipality.

As regards the municipality inhabitants' assembly, which is further tool of direct democracy, and therefore further tool of the participation of citizens in the administration of public affairs, Article 11b of the Act on Municipalities states: "To discuss the municipality affairs, the municipal council may convene an assembly of inhabitants of the municipality or part thereof, and its further regulation shall be left to the discretion of the municipality." Despite the fact that the Constitution or the Act on Municipalities do not regulate the binding force of the institute of direct democracy in details, the municipality, through its council, may stipulate the requirements of the organization, conduct, control and binding force of the decisions and measures taken in the public municipality inhabitants' assemblies by internal binding regulations or general binding regulations so that the adopted conclusions of such municipality inhabitants' assemblies have definite legal effects and are legally binding on the municipal bodies without doubt on their legal nature and binding or non-binding force.

In accordance with Article 3 paragraph 2 subparagraph c) of the Act, the residents of the municipality have the right to participate in meetings of the municipal council. In view of publicity of the municipal council meetings, which is declared in Article 12 paragraph 9, any other persons shall be entitled to take part in such meetings, but the right to comment on the discussed items on the agenda or present views on certain items on the agenda does not directly result for them from the Act, and therefore, it is not legally claimable. "In this case, there is an asymmetry in the Act, namely in the wording of Article 12 paragraph 10 of the Act, between the status of residents of the municipality who may or may not be heard and the status of members of the National Council of the Slovak Republic, members of the European Parliament, representatives of the Government or any other public authority who must be allowed to speak at their request" (Dostál et al., 2013). In terms of Article 12 paragraph 12 of the Act, the details of the meetings of the municipal council may be directly regulated by the rules of procedure of the municipal council. Within the purview of the Act, the municipal council may establish initiative, executive and supervisory bodies and committees as its permanent or temporary advisory, initiative and supervisory bodies. Members of the municipal council may only be elected members of the municipal council, but members of the committees may also be other persons, even those who are not, for example, permanent municipality residents. "Membership in the committees of the municipal council is thus another possible form of public participation in the activities of municipalities. Alike the opportunity to speak in the meetings of the municipal council, the membership in the committees is not claimable and it depends only on the decision of the municipal council whether the persons who are not members of the municipal council are elected members of the committees or the committees consist only of the members of the municipal council" (Dostál et al., 2013). As regards the activities of the municipal council or the committees, the Act does not state and stipulate the requirements of publicity of their meetings, thus suggesting that this issue falls within the competence of the municipal council, which should regulate the publicity or non-publicity of the meetings of its advisory bodies by the rules of procedure and it should also regulate the opportunity to speak for other persons who are not members of these advisory bodies.

In our understanding, an important component to increase the direct participation of citizens in the administration of public affairs is the so-called raising of the awareness of citizens about the activities

of bodies of self-administration at all levels through necessary informedness implemented by means of disclosure of different kinds of information about activities and intended activities of the municipal council, its bodies, committees, about their agenda and materials to be decided, and about the decisions and activities of the mayor and the administrative staff of the respective municipal bodies. In our opinion, only transparent self-administration is the right way to increase real participation of citizens in the administration of public affairs.

3. Conclusion

As seen above, legislation in the field of regulation of participation of citizens in the administration of public affairs is left to the arbitrariness of individual bodies of self-administration, particularly of the members of municipal and self-governing region councils, which in our opinion should be changed and in many cases there should be statutory regulations of individual institutes of direct democracy so as not declared at the level of theory but used in practice. The citizens, especially residents of municipalities and territorial units should play the greater role within local government. The legislators, in particular, regional presidents, parliamentarians, mayors and county councillors, such as authorised representatives of the democracy, should take more account of the wider impact of its policy decisions to life of citizens and should allow for timely action to prevent the decrease in the efficiency of participatory democracy in their territories, because such democracy and civil dialogue are not empty slogan, but, rather essential principles on which the success of the modern, democratic, civic society and therefore of its future depends.

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THE DEVELOPMENT OF UKRAINIAN EDUCATION IN THE CONTEXT OF TRANSFORMATION OF THE STATE AND REGIONAL ADMINISTRATION

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Abstract

The essence of the Ukrainian regional system of higher education as an object of the state administration under the conditions of transformation is defined. The direction and concept of the state policy of education regionalization are determined. The fundamentals of this concept are as follows: the purpose of its development is the formation of the system of the state administration of higher education that will provide the mobilization of internal resources of the higher educational institutions and regions for the development of higher education and the optimization of distribution of nationwide resources directed at the educational area based on the principles of efficiency and justice. Thus, it is important to solving of problem of financing of the branch of higher education.

Key words

Regional systems of Ukraine, object of state management, academic mobility, the concept of public administration in Ukraine, development trends.

1. Introduction

Higher education is the most important key factor of the long-term influence on the development of economy of a country and regions, on the improvement of population's living standards, belonging to the state in the modern society. Thus, it may be indicated that higher education in certain regions and countries in general becomes one of the main core factors of the economic growth.

Scientific and methodological grounds for this research are the theory and practice works in the area of the state administration by such scientists as D. Dzvinchuk, G. Dmytrenko, V. Zhuravskiy, S. Nikolaenko, and others (Дзвінчук, 2003; Дмитренко, 1996; Журавський, 2003; Ніколаєнко, 2005). In the context of the range of problems of the state administration of higher education, interesting are the scientific and practical approaches

proposed by O. Zhabenko, V. Oharenko, N. Safonova, V. Sychenko, and others (Zhabenko, 2003; Огаренко, 2005; Сафонова, 2004; Сиченко, 2010). Despite the wide scope of scientific groundwork in the field of the state administration of higher education, there are many problems requiring further development. There is still no complex research of the reformation of legal and regulatory, organizational and functional components of the state administration of education in higher educational institutions of the I-II accreditation levels in Ukraine. This research should interpret theoretically the modern tendencies and the principles of proper governance, and take into account the development process of the state administration in the educational field.

Paper objective is to determine the essence and the development of regional systems of higher education as an object of the state administration under the present conditions. It is also necessary to demonstrate the direction and the concept of the state administration of higher education in regions under the present conditions providing persistence, stabilization and further stable development of higher educational institutions in accordance with the main policy of a modern state.

2. Paper main body

The role of education from the regional point of view is known. Social sciences consider the educational institutions as the main channel of social circulation. The modern post-industrial societies are characterized with the intensive inter-branch and international flow of physical and human capital, the quick appearance of new branches, their rapid development and further reduction.

The systematic structural reconstruction of the state administration leads to radical changes in the social environment. However, this question has not been studied comprehensively yet, requiring more attention. It is one of rather substantially studied and solved question in the foreign literature. As for the recently adopted official documents defining the prospects of the development of Ukrainian education, they determine the range of problems concerning the improvement of the economy of education and the development of scientific problems, the most important of which include the issue of the improvement of the state administration of higher education, the development of the statistics of education, the increase of internal and external efficiency of education at the central, regional and institutional levels (Ніколаєнко, 2005).

Special attention is paid to the question of the increase of competitiveness of Ukrainian education, the stimulation of integration processes in it, the establishment of the new types of educational institutions, scientific schools and centres in regions, the regional forecasting of the needs of society in certain skills and knowledge types, and the satisfaction of social demand of the population for the higher continuous education. The urgency of the problem of development and implementation of the new mechanism of higher education financing increases, as well as the training and retraining of personnel for the system of higher education, and the development of the system of public organizations in education. During the cycle of labour activity, a person needs to change occupation, place of work and even place of residence several times. Under these conditions, the labour force reproduction stipulates the increase of their professional mobility (Указ Президента України..., 2002; Сафонова, 2004).

The professional mobility as a component of global tendencies makes the range of demands of academic mobility, which would become the most important qualitative characteristics of the modern educational systems. Thus, the academic mobility originates from the time of establishment of the first European universities. At that time, students and teachers traditionally spent the majority of time travelling, changing one higher educational institution into another. The academic contacts depended on political and economic conditions, and the flow of students from the other countries depended on the level of activity of interstate relations (Zhabenko, 2003).

The modern academic mobility is connected with the individual movement of students and higher-education teaching personnel. It is based on the interacademic contacts based on the creation of the single system of education and the integration of educational institutions, the intensification of regional and national opportunities for the formation and the implementation of the policy in the area of education corresponding to the new conditions. The development of international trade, the intensification of division of labour and specialization turn the migration of labour force to the most important conditions and lead to the establishment of the international labour markets. For example, the integration of European countries leads to the creation of the single "European home" that transforms the educational system into a sort of a "single European university" (Закон України "Про освіту", 1991; Огаренко, 2005).

The state level of the administration of education provides for the maintenance of the single

educational space guaranteeing the high quality of education favouring the development of academic mobility. However, it is possible to determine the optimum scope and the sufficient diversity of educational services provided by local institutions of the system of higher education only at the regional level taking into account the state of economy, the structures of population employment in one or another region.

The concept of the state administration of higher education in Ukraine, under the conditions of decentralization and adoption of the European level, favours the increase of the quality of educational services provided by the regional systems to population, enterprises and establishments of these territories as the main institutions of society, the core factors of economic and social development of the state (Дмитренко, 1996; Сиченко, 2010). The fundamentals of this concept are as follows: the purpose of its development is the formation of the system of the state administration of higher education that will provide the mobilization of internal resources of the higher educational institutions and regions for the development of higher education and the optimization of distribution of nationwide resources directed at the educational area based on the principles of efficiency and justice.

The result of implementation of this concept must be the solution of the following tasks (Панов (ed.), 2006a, 2006b; Дзвінчук, 2004):

- a) the creation of conditions for stabilization of functioning and further development of higher education in a region;
- b) the intensification of focus of the development of higher educational institutions on the additional internal sources of self-financing and the means of regions;
- c) the creation of conditions for the optimum distribution of higher education among the groups of population with different levels of income, educational tastes, academic abilities, among the different regions based on the principles of efficiency and justice;
- d) the increase of attractiveness of the programmes of academic and professional education for the residents of these regions based on the principle of the necessary diversity of specialities and specializations taking into account the specific nature of local labour markets and social demand of population;
- e) the development of legal, informational, statistical base in the system of higher education;
- f) the formation of the effective system of higher education guaranteeing the maximum employ-

ment, the increase of incomes of population, and the cultural advance;

- g) the building of confidence in regional education, the provision of economic safety of regions and the equal accessibility for population to the qualitative higher education.

The reformation of the state agencies of administration of higher education at the national and regional levels is directed at satisfaction of the interests of population, employers, and territories. This is the main purpose of the state at the moment.

The scales, the sizes and the tasks of the modern higher education result in the establishment of institutions of such complexity and size that the exclusively centralized administration becomes impossible. Thus, the necessity appears to delegate the part of powers from the central authorities to the regional ones, which is implemented in the policy of regionalization of higher education. This provides for the improvement of the centralized administration of higher educational institutions and the increase of the role of regional governments in higher school control. The questions of higher education must be governed by both state and regional levels of administration (Дзвінчук, 2003).

Education plays the very important role in the creation of fundamental conditions for population prosperity that is proved by the world practice of social and economic researches. The significant influence is made by the system of higher education in the current period of joining the post-industrial society. This stipulates the exigency to search for the optimum ways of fastest renewal of the educational system at the regional level, to help it out of a crisis, to provide not only the survival, but also the expected development of the system in accordance with the global tendencies stipulated by the general processes of the society development (Журавський, 2003).

The process of regionalization of education includes the focus on the needs of an individual implemented in this area, the formation of single educational space of a region, and the consideration of specific regional peculiarities with the determination of areas and directions of activity of all the structural elements of the educational system.

The issue of the reformation of the state administration of higher education in Ukraine maintain insufficiently elaborated. It is connected with the difficulty of suggestion under the conditions of the political and economic instability of the long-term strategy of the state administration. However, in connection with the gradual intensification of the process of the country development, the organizational and legal registration of the administrative structures, and the

improvement of the content of powers of the bodies of the state executive authorities and the bodies of local self-government, the real conditions for the transition of the system of administration to the qualitatively new level begin to appear.

It should be emphasized that during the next years, the role of the state in the administration of higher education in Ukraine will be significantly higher than it is in the European countries. Considering this, it should be the state represented by its authorities to understand the necessity to reform the state administration of higher education and to make it conform to the modern conditions. All the responsibility for the beginning and the course of the reform of the state administration of higher education in Ukraine must be taken by the President and the Government of Ukraine, and the Ministry of Education and Science of Ukraine. If the executive authorities are not confident concerning the implementation of certain changes, then in order the models of the reformation of the state administration of higher education to work it is necessary to carry out an experiment to answer the majority, if not all the questions.

We are convinced that the reformation of the state administration of higher education must be implemented by means of the performance of specific actions. Thus, there is the need in the development, the approval and the implementation of the Concept of the reformation of the state administration of higher education in Ukraine. This makes it possible to accumulate the resources of all state authorities as much as possible, to ensure the consolidation of efforts, the coordination and the interaction during the determination of the effective ways of urgent problems solution.

One of the main problems requiring the urgent solution is the problem of financing of the branch of higher education. In comparison with the European countries, Ukraine is among the top ten countries with the highest level of the investment of the state funds into higher educational institutions. However, their "shortage" indicates the inefficiency of the existing model of the state financing of higher education. It is known that the European countries formed several models of higher education financing – financing according to expenditures, financing according to results, contractual financing of education, government order based on capitation, etc.

It is important to ensure transparency of the procedure of higher school financing. Interesting in this context is the model of higher school financing in France. It allows to step aside from the allocation of state funds to higher education based on quantitative indices, and to go over to the qualitative criteria

of the development – the participation in scientific researches, the quality of education, the training of skilled personnel. The clear definition of the criteria of financing of the higher educational institutions shall favour their efficient operation and shall create the effective system of distribution of state funds among higher educational institutions regardless of the conjuncture, political factors.

Now, the state administration of higher education in Ukraine is the difficult vertical hierarchic structure, the distinctive feature of which is a high level of administration centralization. However, the European experience shows that the central level of administration shall establish the regulatory framework, and the regional level of administration shall ensure its execution. Together, they must create the conditions for the implementation of these standards.

Thus, considering the European experience, it is possible to carry out the optimization of the functional component of the authorities of the state administration of higher education in Ukraine in the direction of the increase of the role of the community, and the introduction of the principle of publicity. The excessive centralization of the state administration is unjustified under the modern conditions, and does not allow the system of higher education to trigger the ways of self-organization and to find way out of crisis independently. That is why it is necessary to take certain measures concerning the delegation of power. The decentralization of the administration of higher education shall potentially provide the possibility to better determine the needs of the regional economy in specialists, to meet the needs of the population and to get the community involved. At the same time, it is necessary to pay attention to the peculiarities of different regions when using financial resources and stimulating interaction at the regional and central levels in the field of administration of higher education. The Ministry of Education and Science of Ukraine must become the body of state supervision over higher education, which should determine the goal, the priorities, the directions and the main tasks of the state policy in the field of higher education.

The reformation of the state administration of higher education must ensure the increase of the quality and the reduction of the terms for the achievement of results; the transparency, the openness, the reasonableness and the timeliness of the solutions of the bodies of state administration; the increase of the effectiveness of the interaction between all levels of authorities and NGOs at the expense of the clear definition of measures, procedures and criteria for the achievement of results.

3. Conclusions of the research

The success of the development of higher education mainly depends on the theoretical analysis and the transformational changes in the state administration, on the study of the historical experience of European countries, on the determination of general tendencies and peculiarities in this field. One of the peculiarities of the present higher education in Ukraine is the state nature of origin and the centralized form of administration during the long period of time. This leaves its mark on the ways and the means of its further development, and, in particular, excludes the possibility of decrease of the degree of accessibility for population to the state building.

The state represented by state and regional governments must be the initiator of the educational reforms. The new state policy in the area of higher education must be based on the traditions of Ukrainian higher school and, at the same time, include the new elements of higher school improvement.

The system of higher education consists of the higher educational institutions implementing the educational programmes, which are located on the territory of one or another region and mainly satisfy the needs of its population. The tasks of the governments (both state and regional) in the area of higher education must be in the optimum provision of the regions with the qualitative education in accordance with social standards.

The regional government must support the competition among higher educational institutions by way of government procurement of the training of highly skilled specialists, the allocation of scientific grants, and the governmental scholarships. The state policy of higher education regionalization and the modern legislative base must be directed at the creation of conditions for stabilization, improvement and further development of the regional systems of higher education. At the national level and in regions, the governments together with the administrations of higher educational institutions must develop the concepts and the programmes of education development directed at the establishment of the new organizational forms in the system of regional higher education and the state mechanism of administration of higher educational institutions.

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