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The origin of the Institute goes back to the Institut des études balkaniques founded in Belgrade in 1934 as one of a kind in the Balkans. The initiative came from King Alexander I Karadjordjević, while the Institute's scholarly profile was created by Ratko Parežanin and Svetozar Spanaćević. The Institute published *Revue internationale des études balkaniques*, which assembled most prominent European experts on the Balkans in various disciplines. Its work was banned by the German occupation authorities in 1941. The Institute was not re-established until 1969, under its present-day name and under the auspices of the Serbian Academy of Sciences and Arts. It assembled a team of scholars to cover the Balkans from prehistory to the modern age and in a range of different fields of study, such as archaeology, ethnography, anthropology, history, culture, art, literature, law. This multidisciplinary approach remains its long-term orientation.

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Intra-settlement Burials of Vinča Culture at Sajlovo 5 Archaeological Site: Continuity or Change in the Late Neolithic Period?

Abstract: During rescue archaeological excavations undertaken in 2011 due to the construction of a north bypass connecting the town of Novi Sad and the E75 highway, several Neolithic-period skeletal burials were detected on a multilayered site named Sajlovo 5, located near the northwestern perimeter of Novi Sad. Close to 7000 m² were excavated in 2010 and 2011, revealing the remains of Early and Late Neolithic, Eneolithic, Bronze Age, Roman, Medieval and Modern Age settlements. The remains from the Late Neolithic period can be attributed to the early traditions of the Vinča material culture. Of the five skeletons discovered on the site, one is radiocarbon dated to the Early Neolithic Starčevo-Körös period, whilst the remaining four were radiocarbon dated to the Late Neolithic Vinča period. This paper discusses their position relative to other period-related finds in the area, attempting to elucidate the funerary practices and rituals at the start of the Late Neolithic Vinča culture.

Keywords: Sajlovo 5, Neolithic, Vinča culture, intra-settlement skeletal burials, AMS Radiocarbon Dating.

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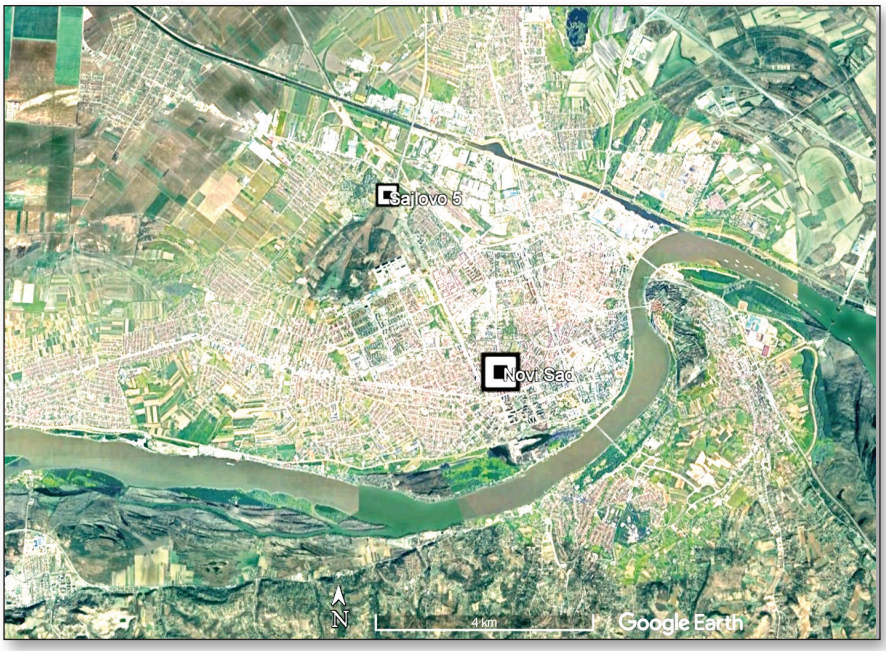

Figure 1. Position of the Sajlovo 5 site in Novi Sad, Serbia.

Introduction

The site of Sajlovo is located in the western suburbs of Novi Sad, the second-largest city in Serbia and the capital of its northern autonomous province of Vojvodina (Fig. 1). A large-scale archaeological excavation was undertaken in 2010 and 2011 in parts of the Sajlovo suburb as part of the road bypass construction to connect the western part of Novi Sad with the E75 international highway to the north of the city. Over the following two years of archaeological excavations, close to seven thousand square metres were excavated, yielding remains of a multilayer, multiperiod site with occupation evidence ranging from Early Neolithic to Modern Age. The Neolithic layers were represented by the remains of pit dwellings, some filled with daub and pottery fragments, scattered around the site, with no apparent grouping or settlement organisation. Due to the overlapping of features of different periods, it is sometimes extremely difficult to clearly delimit the remains by period, and a certain number of features were severely damaged by later reuse of the same space.[1]

[1] The results of the excavations were never published in any detail, and the information regarding its archaeological features in this paper relies solely on the documentation compiled during and after the excavation seasons.

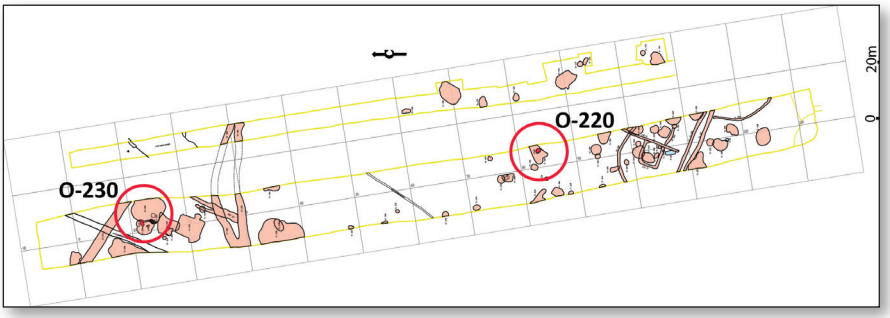

Figure 2. Archaeological features of the Sajlovo 5 site. Red circles around Late Neolithic features 220 and 230 containing burials 25, 26 and 27.

Sajlovo Inhumation Burials and their Position in the Vinča World

The area of the Sajlovo 5 site was subjected to protracted excavations during the construction of the western bypass connecting this part of the city to the E75 highway. The excavations were undertaken over several seasons, resulting in thousands of square meters excavated over the years. In 2010 and 2011, 7000 square meters were excavated in the Sajlovo 5 area by the Novi Sad Heritage Protection Institute, under the guidance of Dušanka Veselinov, revealing remains ranging from the Middle and Late Neolithic, Eneolithic, Bronze Age, Roman, to Medieval and Modern Ages. In total, five Neolithic period inhumation burials were discovered on the site among several hundred excavated features. These burials were marked 19, 22, 25, 26 and 27. Two of the burials were radiocarbon dated as part of the BIRTH project[2], whilst the remaining three were dated as part of the Regional Absolute Chronologies of the Late Neolithic in Serbia (RACOLNS) project.

Because of the complicated, multilayered structure of the site, which surprisingly did not yield a tell site, but rather a site with prominent horizontal stratigraphy, it is difficult to gauge the layout and size of the Late Neolithic settlement. It can be inferred, judging by structures 220 and 230 (Fig. 2, red circles), that it was not a proto-urbanised settlement with densely packed structures, but rather a case of several clusters of homesteads, probably spaced apart from 70 to 100 meters (the curvilinear features belong to later periods).

[2] We wish to extend our gratitude to Dr. Sofija Stefanović and Dr. Marko Porčić for their kind permit to use the date obtained as part of the BIRTH project.

Figure 3. Inhumation burials 19 (top left) (Jovanović et al. 2021: Fig. 9), burial 25 (top right), burials 26 and 27 (bottom) *in situ*.

The settlement consisted of pits and pit dwelling structures with earthen ovens placed on their side, as seen in structure 230 (Fig. 3, bottom), which contained burials 26, 26a and 27 inside. Graves 26 and 26a are most likely the same burial, as 26a consisted of only a handful of displaced skull fragments found close to burial 26.

These types of sunken structures can be found in late-phase Starčevo-Körös settlements, such as Jaričište 1 (Marić 2013, fig. 5), where a structure with two ovens on its eastern edge contained a burial with 4 (not coeval) individuals. Not all burials in Sajlovo were found in structures that contained an oven, e.g., burial 25 found in structure 220 (Fig. 4), a shallow ellipsoidal pit or burial 22 from structure 15, which proved to be a Starčevo Körös-period grave (Jovanović et al. 2021, 240).

It must be said that these *ovenless* features do not appear to have been dug specifically for the purpose of the burial, which is most evident in burial 25, where the burial pit is dug perpendicular to the longer axis of structure 220, even cutting its eastern edge, which would suggest a possible later date of creation for the burial. Furthermore, the infill of structure 220 yielded very few pottery fragments, 12 in total, and only two of these can be identified as early Vinča period with certainty (Plate 1, 1–2), one of them (Plate 1, 1) being part of a black-topped bowl or pedestalled vessel typical of the time. None of the recovered fragments can be interpreted as grave goods, but rather as part of the regular infill of the feature, as they do not constitute a single complete vessel. In contrast, the Vinča period ceramic finds from structure 230, the "oven structure", are more diverse and identifiable, albeit still challenging to interpret. In total, there are fragments of at least 20 vessels, ranging from small to medium-sized fragments. Fragments belong to vessels associated with cooking, serving and consumption of food, and some come together to produce partially refitted vessels, but no vessel was found complete or *in situ*, again suggesting these are not burial offerings. No storage ware fragments or casserole dishes, nor altars or figurines were discovered in structure 230.

The bowls (Plate 1, 3–4) are biconical with a shorter upper cone, fired in a reduced atmosphere. Pedestal vessels are also present, with several examples of stems found in the structure (Plate 2, 1). Several vessel fragments bear traces of secondary burning (e.g., Plate 1, 4), but the unburnt examples show evidence of polishing and burnishing (the latter being less common). The ornamentation is sparse, possibly due to the poor preservation of the vessel surfaces.

Cooking vessels are represented by two examples, one hemispherical (Plate 2, 3), the other spherical (Plate 2, 4). Both are crudely made vessels with lots of mineral inclusions, but the spherical example is somewhat better made. The hemispherical pot bares ornamentation on the rim in the form of shallow depressions made in a sequence and resembling a wave, whilst the spherical

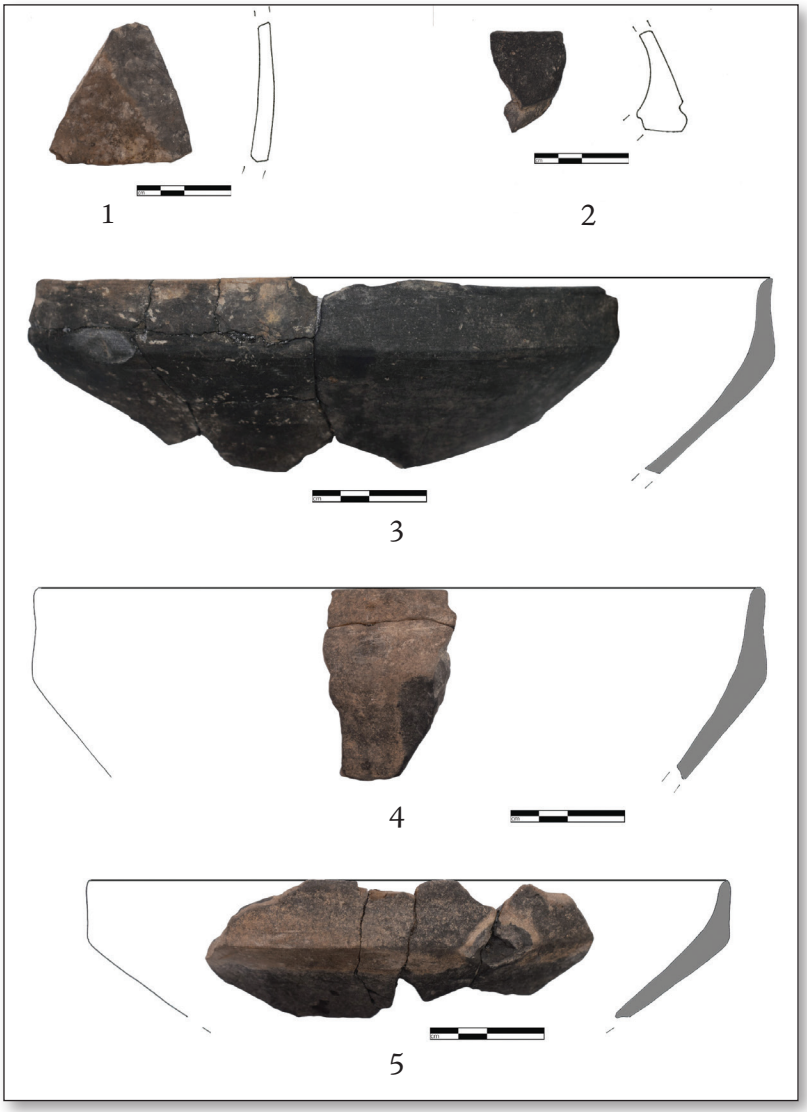

Plate 1. Fragments of Vinča-style vessels from Structure 220 (1, 2) and Structure 230 (3–5).

cooking pot is decorated with a row of rounded impressions made by a tool underneath the rim, on the outer surface of the vessel neck, similar to a cooking pot from Belovode horizon 5 (Mirković Marić et al. 2021, Fig. 16) Other types of ornamentation found in the structure infill are horizontal, zig-zag or slanted incised lines (Plate 3, 1–3) that are common in the early Vinča, Western LBK and Alföld Linear Pottery material (e.g. Jakucs 2020, fig. 10; Horváth and Drașovean 2013) and could suggest the early mixing of these two material

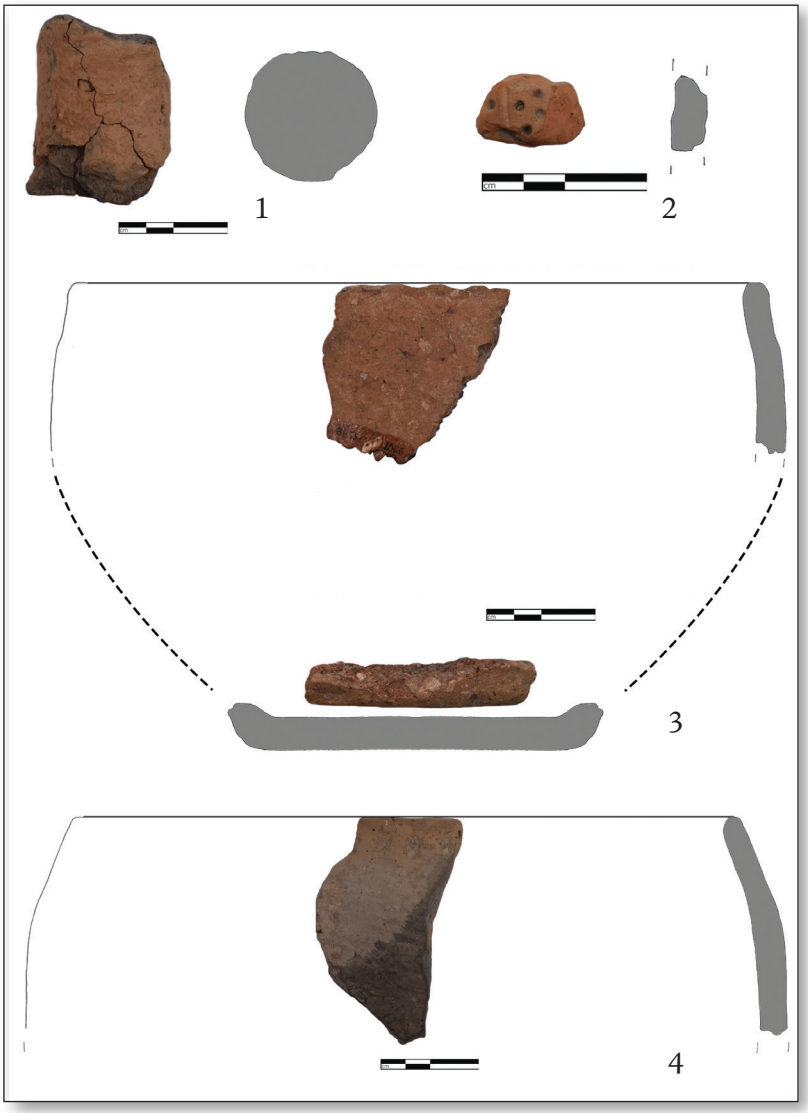

Plate 2. Vinča-style vessels and ornamentation from Structure 230.

culture traditions in the region but also incised bands filled with rounded imprints and white incrustation (Plate 2, 2), a typical early Vinča period pottery decoration.

The fragments in structure 230, mostly due to their fragmentation, condition and state of preservation, cannot be identified as grave goods or part of post-burial offerings or feasts, but would appear to be part of the structure infill, most likely the rubbish of everyday activities in the settlement. This is fur-

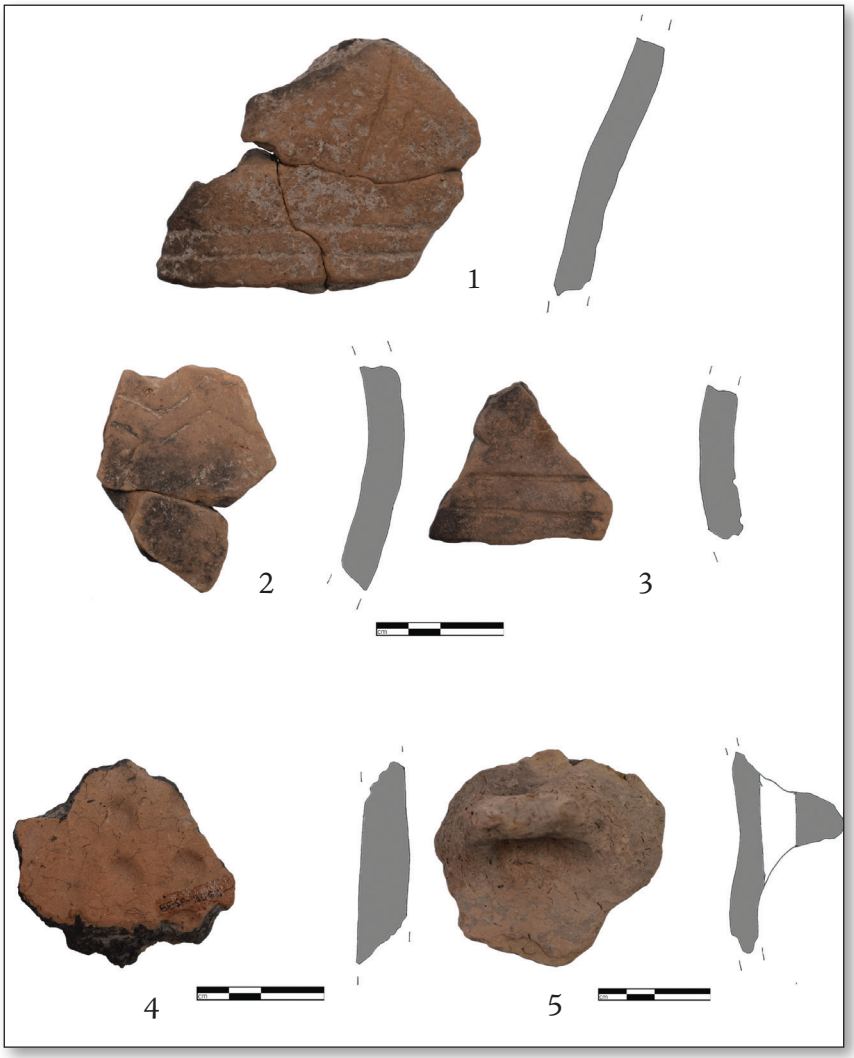

Plate 3. Decoration and handles from Structure 230.

ther accentuated by the large percentage of secondarily burnt fragments in the assemblage.

Anthropological analysis[3] of buried individuals employed the criteria defined by Mikić (1978) as the basis for the determination of the degree of pres-

[3] Full anthropological report (in Serbian) is available as supplementary material on: https://www.academia.edu/143963191/SAJLOVO_5_Anthropological_Report_M_Miljevic_Djajic_Supplementary_material

Figure 4. Burial 25 in Structure 220.

Figure 5. Ante-mortem injury on the back of the right parietal bone of the individual in Burial 25.

ervation of skeletal remains. Sex was, in adult individuals, determined based on the characteristics of the pelvic bones and the morphological features of the skull (Ferembach et al. 1980, Buikstra and Ubelaker 1994), with special attention given to metric characteristics of the individuals (Bass 1995). Age determination at the moment of death for adult individuals was estimated based on the auricular surface of the ilium (Buikstra and Ubelaker 1994), morphological changes on the pubic symphysis (Todd 1920), the degree of fusion of cranium sutures (Lovejoy et al. 1985) and the degree of tooth abrasion (Brothwell 1981). The determination of age at the moment of death for children and juveniles was estimated based on the degree of eruption and development of milk and permanent teeth (Uberlaker 1989) and the degree of ossification of the epiphysis to diaphysis (Schaefer et al. 2009).

Individuals buried in the described structures were all in flexed positions, with legs bent at the knees, constricted towards the abdomen, and hands bent at the elbows and placed in front of the face. Two individuals (19 and 27) were found on the left side, whilst the individual in burial 25 was placed on the right.

The fourth grave, 26, was impossible to determine, as it had been disturbed by later activities and is only partially preserved (Fig. 3, bottom).

The anthropological analyses of the remains showed that burial 19 (Fig. 3, top left) belonged to an adult female aged 45–50 years, 149.13 cm tall, with a visible presence of caries and degenerative changes associated with older age, supported by atrophy of muscle attachments on both upper and lower limbs (Jovanović et al. 2021, 240, Supplement 3, 20–22). No goods were discovered in the burial pit.

Burial 25 remains belong to an adult male placed on the left side in a flexed position (Fig. 4), aged 30–40 years. Some teeth show traces of non-masticatory activities, whilst both the mandible and the maxilla show signs of periodontal disease. An interesting ante-mortem injury, measuring 0.6 cm in diameter, was discovered on the back of the right parietal bone, caused by blunt-force trauma or possibly a fall, which, however, was not the cause of death (Fig. 5). The estimated medium height of the individual was 175.3 m. No burial goods were recorded in the grave.

Burials 26 and 27, discovered in the same context, the pit feature marked as structure 230, are remains of two individuals, one aged 10–15 years, the other 20–24. The skeleton belonging to individual 26 was well-preserved but fragmented. The deceased was buried in a flexed position on the right side, with sharply bent legs, positioned toward the abdomen. The disposition of the hands is not quite clear due to post-depositional damage (Fig. 6, top). No pathological changes were evidenced on the preserved bones, and the sex could not be determined with certainty. The individual in burial 27 was a male about 20 years of age, buried flexed on the right side, with bent legs and arms mildly bent and placed over the legs (Fig. 6, bottom). The parietal and occipital bones bear traces of porous hyperostosis, whilst the left tibia shows evidence of periosteal reaction. Vastus notch is visible on both patellae, possibly the effect of frequent squatting or kneeling. The estimated height of the individual was 175.76 cm. Based on the occurrence of pathological changes, such as linear hypoplasia of tooth enamel, porous hyperostosis and periosteal reaction, it is plausible that the individual in burial 27 succumbed to some sort of sickness, possibly an infection. No grave goods were recorded in this burial either.

During the BIRTH project (Jovanović et al. 2021, 240, Supplement 4), burials 19 (BRAMS-2425, 6211±28 BP) and 22 (BRAMS-2426, 6721±28 BP) were radiocarbon dated, the latter determined to belong to the second half of the Starčevo-Körös period (5707–5566 calBC at 95.4% conf.), whilst the first belongs to the early Vinča period (5293–5059 calBC at 95.4% conf.). The results presented here are new radiocarbon dates obtained from other inhumed individuals from Sajlovo during the RACOLNS project, funded by the Science Fund of the Republic of Serbia.

Figure 6. Burials 26 and 27 in Structure 230.

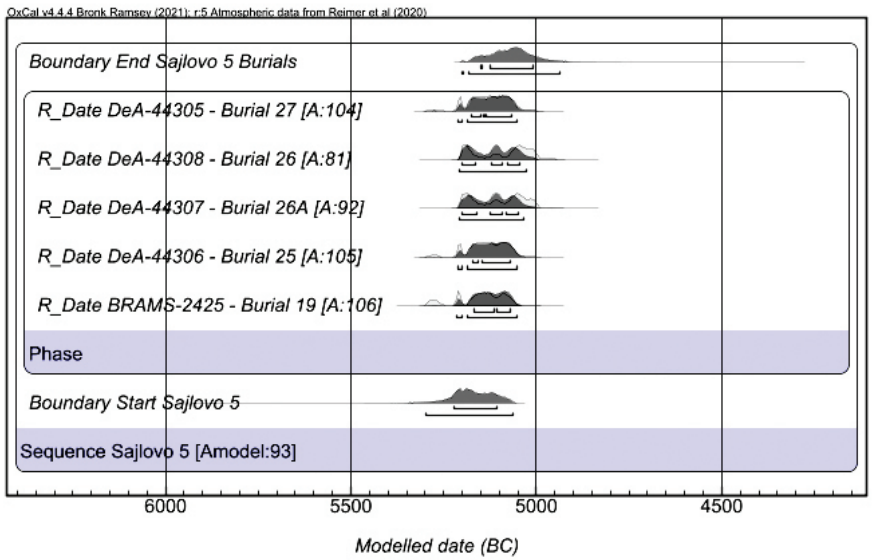

Figure 7. Bayesian Chronological Model of the Sajlovo 5 Late Neolithic burials.

The radiocarbon age estimation for BRAMS-2425 from burial 19 sampled during the BIRTH project, which examined the skeletal, nutritive and cultural effects that led to the first demographic expansion of humans in the Neolithic, approximately 8000 years ago (Porčić et al. 2021), placed this burial in the Late Neolithic period, instigated our intention to radiocarbon sample other Neolithic burials from the site, examined in the paper. These four samples, given in Table 1, originate from burials 25, 26, 26a (a dislocated skull found near burial 26) and 27.

Based on the analysis of ceramic finds recovered from structures that contained the burials, it can be assumed that the burials are part of a single chronological phase. Using OxCal v4.4.4. and IntCal20 calibration curve (Bronk Ramsey 1995; Bronk Ramsey 2009, Bronk Ramsey 2010 (Bronk Ramsey 2017; Reimer et al. 2020), a Bayesian chronological model (Bronk Ramsey 2009; 2017) was created to reflect this assumption (Fig. 7). The method's strength is the possibility to quantify uncertainties linked with statistical estimates of radiocarbon measurements and has been used many times in modern archaeology, even on Late Neolithic Vinča period finds (Marić et al. 2025; Whittle et al. 2016; Tasić et al. 2016; Borić 2009; Schier 1996). The constructed chronological model with a very high agreement (Amodel=92.8) appears to corroborate the short-phase burials notion, which would also imply a relatively short settlement span on the site. Based on the Bayesian chronological model for Sajlovo (Fig. 7), the start of Late Neolithic Vinča burials occurred not prior to 5297–5062 calBC (95%

Name		Unmodelled (BC/AD)				Modelled (BC/AD)				Indices A_{model}=92.9 $A_{overall}$=93.7				Controls		
		from_68.3	to_68.3	from_95.4	to_95.4	from_68.3	to_68.3	from_95.4	to_95.4	A_{comb}	A	L	P C	Select	Page	Edit
▼ Sequence Sajlovo 5														2		
Boundary Start Sajlovo 5						-5222	-5107	-5297	-5062				97.3	3		
▼ Phase														4		
R_Date BRAMS-2425 - Burial 19		-5215	-5072	-5297	-5052	-5167	-5073	-5216	-5052		105.6		99.4	5		
R_Date DeA-44306 - Burial 25		-5208	-5072	-5218	-5045	-5172	-5071	-5212	-5053		104.9		99.5	6		
R_Date DeA-44307 - Burial 26A		-5206	-5006	-5209	-4999	-5200	-5048	-5208	-5034		91.8		99.4	7		
R_Date DeA-44308 - Burial 26		-5205	-5001	-5210	-4993	-5202	-5044	-5207	-5027		81.6		99.4	8		
R_Date DeA-44305 - Burial 27		-5173	-5073	-5215	-5046	-5175	-5068	-5211	-5052		104.2		99.5	9		
Span Span of burials						0	83	0	154				98.8	11		
Boundary End Sajlovo 5 Burials						-5124	-5010	-5203	-4940				96.5	10		

Figure 9. The unmodelled and modelled radiocarbon dates from Sajlovo 5.

prob.), possibly between 5222–5107 calBC (68% prob.) (Fig. 8, top), and the cessation of burials in features happened no later than 5184–4940 calBC or 5203–5198 cal BC (95% prob.), possibly 5124–5010 calBC (68% prob.) (Fig. 8, middle). These modelled results give a span of 0–154 years (95% prob.), possibly just 0–83 years (68% prob.) for the duration of the inhumation made in features on the Sajlovo 5 site (Fig. 8, bottom). Another peculiarity is the almost identical radiocarbon date obtained on bones from burials 26 and 26A (both partial). The remains associated with burial 26 were modelled at 5207–5027 calBC (95% prob.), possibly 5202 (26.4% prob.) 5165 cal BC or 5123 (20.6% prob.) 5094 calBC or 5077 (21.2% prob.) 5044 calBC at 68% prob., whilst the remains (namely a partially preserved skull) associated with burial 26A are modelled at 5208–5034 calBC (95% prob.), possibly 5200 (24.4% prob.) 5160 calBC or 5125 (24.1% prob.) 5090 calBC or 5081 calBC (19.8% prob.) at 68% prob. (Fig. 9). This could potentially signify a single event of a dual burial or the misinterpretation of skeletal remains as two individuals; however, due to the incomplete preservation of the skeletal remains, it remains difficult to be sure. The remains associated with burial 27 discovered in the same feature appear to be of a somewhat later date, modelled at 5187–5052 calBC (95% prob.), possibly 5175 (19.1% prob.) 5144 calBC or 5135 (49.1% prob.) 5068 calBC at 68% prob. and may be the cause of post-depositional disturbance of grave 26(26A).

Modelled against the Vinča material culture relative chronology timeline (Whittle et al. 2016, fig. 37), the Sajlovo 5 site sits firmly in the Vinča B1/ B2 period. This would correspond with the 8–6.5 meters relative depth at the site of Belo Brdo in Vinča, and would coincide with the human remains found by Miloje Vasić in the ▼7.1–▼7.8 metres range on Belo Brdo.

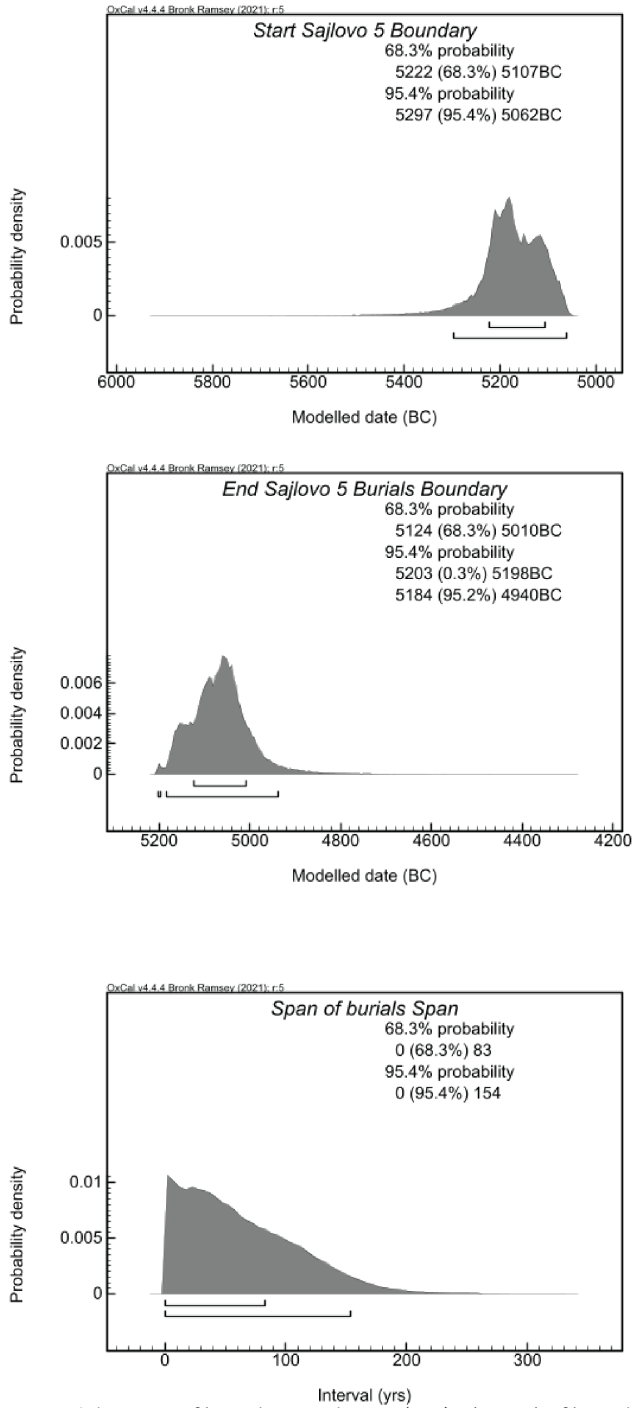

Figure 8. The start of burials at Sajlovo 5 (top), the end of burials (middle), the estimated span (bottom).

Burial Practices in the Starčevo-Körös and Vinča Period and Sajlovo Burials

Several hundred sites from the Early Neolithic Starčevo-Körös and Late Neolithic Vinča periods are known throughout the Central Balkans and the southern Pannonian plain, but human remains and necropoles are still rather scarce, even after over a hundred years of research. Even though, in general, most sites are poorly researched, often just by single trenches, human skeletal remains are not as uncommon as one might expect, especially in the Early/Middle Neolithic period, due to the common practice of intramural burials, where individuals appear to be buried within the limits of the settlement in dwellings that are abandoned after the burial (Živković 2008). Even sites from this period with numerous excavated trenches, like Golokut Vizić (Petrović 1987; Živaljević et al. 2017, 7–8), Blagotin (Stanković and Leković 1993; Stanković 1992), Starčevo grad (Živković 2008) or Jaričište 1 (Marić 2013; Stefanović and Porčić 2015), offer the same image, supporting the premise of intrasettlement burials in the Early/Middle Neolithic period. A problem arises from the fact that a significant portion of excavated Early/Middle Neolithic sites with human burials was never published, neither partially nor fully (e.g. Leković 1985), often remaining no more than a footnote in the introductory parts of other publications, thus depriving us of detailed descriptions of mortuary practices and numbers of burials. It is often difficult to discuss intricate matters such as mortuary practices, one of the core human activities that helps us establish the period and the ethnic or cultural attribution of individuals recovered in the field during excavations.

However, certain information can be extrapolated from the available records, and here we present only a short summary before proceeding further. Skeletal burials from the Starčevo–Körös period are most commonly found in pits, whether shallow or deeper, mostly irregular in shape. Examples of shallow pits are known from sites like Zlatara near Ruma (Leković 1985, 160–61), Rudnik Kosovski (Mikić 1989; Tasić 1998) and Kozluk-Kremenjak (Jovanović 1967, 12). Deep pits, often interpreted as dwelling structures, are more common and are known from various sites, e.g., Blagotin (Stanković and Leković 1993; Redžić and Zečević 1995, fig. 1; Haskel J. Greenfield and Jongsma 2006), Jaričište 1 (Marić 2013; Stefanović and Porčić 2015), Golokut Vizić (Petrović 1987) and Obrež Baštine (Brukner 1960), among others. There is also evidence of burials under floors of structures, with examples found in Topole Bač (Trajković 1977), Bezdan–Bački Monoštor (Jovanović et al. 2021, SM2–8) and elsewhere.

Most commonly, burials contain one individual (Galović 1968, 168; Garašanin 1959, 7; Vasić 1936, 35; Leković 1985), though examples are known of dual burials (Trajković 1977; Leković 1985), multiple (not necessarily coeval) burials (Marić 2013) and even possible mass graves, like the (in)famous *Pit Z* ossuary found at the Vinča Belo Brdo site (Vasić 1932; 1936; Perić and Nikolić

2006; Tasić et al. 2016; Stefanović et al. 2016; Jovanović et al. 2021, 230). The positions of the inhumed individuals also vary; the most frequent are the ones flexed to one side, either the left or the right, with bent arms in front of the skull area and legs sometimes heavily bent at the knees towards the torso. However, other body positions are known as well, like some extended supine inhumations of Lepenski Vir (Borić and Stefanović 2004). Child burials are recurrent, and usually the burial practice does not differ from the other inhumations; however, there are examples of children being buried in the same contexts as adults (Marić 2013; Leković 1985) or underneath house floors (Borić and Stefanović 2004).

Whilst most burial features appear to be pit dwellings or structures of some kind, often equipped with hearths or even ovens (Marić 2013, fig. 5), some authors, like Leković (1985, 161–62), advocate purposeful construction of *burial chambers* with even varying pre-burial treatments, like purification by fire or deposition of sterile soil. It is our opinion that we are dealing with too small a sample for such conclusions, but they should not be taken completely off the table.

Grave goods are not common in the known examples of the Starčevo-Körös period graves, but there are a few recorded examples, such as in Tečić, where typical Starčevo clay vessels were found placed next to the heads of the deceased (Galović 1968, fig. 1), same as in Kozluk-Kremenjak (Jovanović 1967, 12). There is also evidence of a somewhat different practice, found in the multiple burial found on Jaričište 1, where a harpoon made of deer antlers was found next to the head of a child (Marić 2013; Stefanović and Porčić 2015, fig. 7). Other grave goods, like *Unio pectorum* shell and some polished and chipped stone tools, were found at the Topole Bač site (Jovanović et al. 2017). Another example of a different set of burial goods was evidenced on the site of Zlatara, where an inhumated adult, aged 19–21, in burial A contained a polished stone amulet and a fragment of quartzite, and was accompanied by a later, nearby interment of a child, which was placed near his head, with a single piece of quartzite on the skeleton (Leković 1985, 160). However, the richest of grave goods have been observed in burial B at Zlatara, where two complete vessels (one pedestaled) were found alongside beads made of spondylus shells, two polished stone axes, two fragmented flint blades, two bone awls, a loom weight and a few fragments of quartzite (Leković 1985, 161). It must also be stated that burial B belonged to an adult female between 40 and 45 years of age. This is rather interesting, as one would not expect polished stone tools to be associated with female possessions in the period.

Regarding funeral rites, it can be observed that in the case of Jaričište 1 and Zlatara, there are obvious parallels. Namely, in both cases, a thick layer of pottery fragments accompanied by "meaty" animal bones was found above the burials, suggesting a ritual offering for the other world (Leković 1985; Marić

2013, fig. 5) performed immediately upon the burial of the deceased. Refitting of the recovered pottery fragments in Jaričište 1 resulted in the total reconstruction of several vessels, ranging from bowls to storage vessels (Marić 2013, fig. 6), indicating their deliberate smashing above the graves of the deceased. Additionally, in Zlatara, numerous shells of *Helix pomatia L.* were discovered in both burial A and burial B above the level of the deceased. Whether they represent an episode of a feast or a symbolic gift for the afterlife is unclear. A similar *ritus* can perhaps be presumed for the heavily contracted burials 1 and 2 from Topole Bač (Jovanović et al. 2017, fig. 3), where pottery and shells were found on the floor level above the burials. However, if we consider the location of these burials in more detail, it is also possible to associate the pottery discovered on the floor level with the continued life of the structure after the burial, in itself a rare phenomenon in the early Neolithic of these areas, rather than with the burial processes. Skeleton 3, a female 25–35 years of age, found at the edge of the same feature outside the floor area, according to the researchers, aside from a less contracted position, had a polished stone tool next to her, whilst snails and shells were discovered upon the removal of the bones (Jovanović et al. 2017, 261). Another polished stone tool, a cylindrical chisel-axe with an arched cutting edge, was found next to the chest area of burial 2 in Kozluk – Kremenjak, whilst for the second, fragmented one, no detailed location is given (Jovanović 1967, 12, T.II: 15–16). Sadly, neither of the two skeletons from Kozluk has been anthropologically analysed at the time of the discovery, nor has the sex and age of the buried individuals been determined, and they are now misplaced and cannot be found in the depot of the Vršac City Museum (pers. communication). In this light, perhaps it may be wise to reconsider the role of polished stone tools in the Early/Middle Neolithic period and the Starčevo-Körös communities.

The transition to the Late Neolithic around 5400–5300 calBC (Whittle et al. 2016) and the formation of the Vinča material culture that occupied the Central Balkans and the adjacent areas heavily altered the Neolithic way of life. A predominantly sedentary lifestyle with periodical or occasional movements, which had already started to form towards the end of the Middle Neolithic, evident in the creation of the first more permanent wattle and daub structures towards the end of the Starčevo Körös period (Marić 2024; D. Garašanin 1961; Raczky 1980; Kalicz and Raczky 1982), appears to become the dominant form of living in the Late Neolithic, resulting in the appearance of settlements with pronounced vertical stratigraphy, tells in the Carpathian Basin and multilayered large settlements and tells in the Central Balkans.

The prolonged occupation of a location selected for a settlement surely brought about new ideas and concepts on the use of limited space within and surrounding the settlement. But it does not appear that the creation of a separate necropolis outside the perimeter of the settlement was an immediate and

defining dominant concept of the Late Neolithic world in the Central Balkans and the adjacent Carpathian Basin. Although the number of known graves in the territory covered by settlements of the Vinča culture is not especially large, several early phase finds can be singled out, like the grave found at 8.75 meters of relative depth in Vinča itself (Vasić 1932, 26; 1936, 36; Palavestra and Milosavljević 2020, 675–76), corresponding to the Vinča A period (Garašanin and Garašanin 1979, 17; Whittle et al. 2016, fig. 2). In the second volume of his capital work on the decades-long research in Vinča, Vasić notes that the skeleton at 8.75 metres relative depth, discovered in 1911, was found in a contracted position on his right side, with arms bent at the elbows and the right arm under the head, legs bent at the knees and contracted towards the torso (Vasić 1936, 36). No grave goods were recovered, and no mention of the archaeological context of the find is given, aside from a photograph (Vasić 1936, fig. 55), in which a sub-oval depression can be seen around the skeleton; however, it was never explained in more detail in the monograph. Sadly, the skeleton was destroyed in the autumn of 1914, at the onset of World War I, when the artillery shells of the Austro-Hungarian forces hit the building of the Museum in Belgrade, where it was stored.

Another find from Vinča mentioned by Vasić is recorded at 7.64 meters of depth (Vinča B1), where a layer of ash was discovered, 95 cm long (width is not recorded), in which a damaged human skull was found at the southwest end, whilst the ash itself contained some calcined human bones (Vasić 1936, fig. 364a). Vasić established this find as an example of cremation burial practice, associating other visible ash (sub)layers on the site with this practice (Vasić 1936, 182).

In the first volume of *Prehistoric Vinča*, Vasić noted more human remains found during the excavations in Vinča at various depths: ▼4.5, 4.7, ▼5.2, ▼7.1, ▼7.5, ▼7.7 (four examples), ▼7.8, ▼8.7, ▼8.9, ▼9.0 and ▼9.3 metres (Vasić 1932, 26). Looking at the values listed, it is quite plausible to group them into three ranges: the first being ▼4.5–5.2 metres, the second between ▼7.1 and ▼7.8, and the third from ▼8.7–9.3 metres, indicating at least three possible necropoles. Unfortunately, Vasić never published the details of these finds, deciding to limit himself to listing these particular values solely due to the fact that easily identifiable human remains (skull fragments) were found at these points. Thus, we are left without the spatial positioning and archaeological contexts of these finds, depriving us of the possibility of reconstructing whether these finds were in pits or graves, inside or outside the settlement area. However, as Vasić's work can be reconstructed, at least partially, from the surviving documentation, it is safe to say that his excavations took place in the central area of the late-phase Vinča settlement, and likely at the periphery of the early-phase Vinča settlement, which was surely smaller (Nikolić 2006, Figs. 2–3).

Vinča Belo Brdo is not the only Late Neolithic site with human burials. Miloia reported a find of a skeleton of an adult in a contracted position, lying on its right side in Parța (Garašanin 1956); however, as it was found in a building and placed over the hearth, its interpretation as a burial is rather dubious. Felix Milleker (Milleker 1938, 166) reports multiple possible Neolithic burials found at different multilayered sites around the town of Vršac, some discovered during construction works; however, only one of the sites, Potporanj Granice, is a confirmed Vinča-period site without a later prehistoric horizon. It is interesting that in Potporanj, Milleker reports an urn burial with a chisel found inside the vessel as a grave good. No further details are given about the context of the find. However, if the urn is to be identified with the one in Figure 12 (Milleker 1938, 117), its shape cannot be conclusively identified as a Vinča-style vessel, although Garašanin (M. Garašanin 1956, 209) claims it is an early-phase Vinča find.

The site of Kremenjak, southwest of the town of Čoka in northern Banat, is also known for finds of multiple burials belonging to the Late Neolithic period. First excavated at the beginning of the 20th century by several researchers (Gubitza 1906; Orosz 1912), including Ferenc Móra (Móra 1925), whose excavations covered the majority of the site but were abruptly halted due to the outbreak of World War I, Kremenjak yielded 13 inhumation burials of the Late Neolithic period (Siklósi 2013, 131). Although the contexts for the majority of the burials have not been securely established, at least some of the inhumed individuals were buried inside pit structures or under settlement features like ovens (Banner 1960, 14). The burials were not radiocarbon dated, but the description of the associated finds indicates the early-phase Vinča period, probably late Vinča B. The burials were mostly concentrated in the southern half of the settlement, and at least some had grave goods in the form of beads or bone rings on fingers (Orosz 1912, 34).

Botoš Živanića dolja near Zrenjanin and Gomolava near Hrtkovci are probably the two best-known examples of Late Neolithic Vinča period necropoles. The necropolis in Botoš was first discovered in 1925 when local brickworks damaged it (Garašanin 1956, 206). Following Milleker's visit to the site in 1930, when he discovered additional burials, a systematic excavation was undertaken by Milorad Grbić in 1931, unearthing 10 graves and 3 displaced human skulls. The burials were oriented in different directions (Grbić 1933, fig. 14), but all of the Neolithic deceased (one burial was from antiquity) are in a crouched position (more or less constricted), either to the right or the left, with graves 4 (polished stone tool), 6 and 9 (ceramic vessels) containing grave goods. Sadly, the bones were immediately buried back into a communal grave on the site, without even performing a rudimentary anthropological analysis and taking measurements. Grbić also notes in his paper that before finding the graves, he had surveyed the north-western vertical section of the brickworks, where he discovered multiple

elongated rectangular features, which he identified as "pits", most likely enclosure ditches, some of which contained human remains (skulls were found in pits 1 and 6). If we accept these ditches as Late Neolithic settlement enclosures, then the Botoš cemetery is an example of an extramural Late Neolithic necropolis.

Another example of a Vinča-period necropolis, probably the most examined and published one, was discovered between 1973 and 1977 on the Gomolava tell site, located on the bank of the Sava River, near the villages of Hrtkovci and Gomolava (Jovanović 2015). Excavations revealed 27 inhumation burials and 6 additional dislocated skeletons, which had been *reburied* in certain graves. Besides Botoš, this is the most famous of the Vinča necropoles, being published many times partially or fully since its discovery (Jovanović and Ottaway 1976; Petrović 1984, 20–23; Borić 1996; Ottaway 2001; Jovanović 2015; Stefanović 2008). The necropolis was formed partially on archaeologically sterile soil, but also over the area occupied by pit houses and wattle and daub structures from the earlier Late Neolithic settlement horizons (Brukner 1980, 30). Based on the rich grave goods (Jovanović 2015; Brukner 1988) accompanying most of the buried individuals, as well as the radiocarbon dating of the skeletons (Borić 2009, 199), it can be safely concluded that this necropolis can be attributed to the late Vinča D period. Less certain is the *intramural* attribution of the necropolis, as it may be possible that the late Vinča D2 period settlement occupied solely the southwestern portion of the tell, making the necropolis extramural.

What particularly stands out is that all the skeletal remains recovered in Gomolava belong to male individuals, 19 adults and 6 boys (Stefanović 2008). The sex-based selection of the burials makes the Gomolava necropolis a very unusual case, probably not a common occurrence in Vinča societies of the time; however, more finds are needed for this to be firmly established. Given the broad age range (infancy to old age), age does not appear to have been an important factor in the selection of buried individuals. The analysis of Y-bound STR loci indicates that this may have been a case of common ancestry, i.e., a single-family, all-male necropolis (Stefanović 2008, 97).

In recent years, several more Vinča period sites containing inhumation burials were discovered. The site of Gornja Šuma, northwest of Novi Sad, was excavated during the construction of the E75 Novi Sad – Subotica highway in 2007. The results of these excavations have been only summarily published (Jovanović et al. 2021, 241–42), listing finds of pits, wattle and daub houses and one ditch and four inhumation burials. From the description of the archaeological context, it can be concluded that the burials were found in various trenches, with at least one burial (burial 2) found in a structure (structure 2 in trench 5), suggesting that this was an intramural necropolis. Radiocarbon dating of three skeletal remains (burials 1, 2, and 4) placed all of them in the period between the 53rd and 51st century calBC, or the Vinča A period.

Another site with Vinča period remains is Zmajevo Livnice, excavated in 2010 as part of the same rescue operation on the E75 highway construction. The site was located near the village of Zmajevo, in North Bačka. The summarily published list of features (Jovanović et al. 2021, supplement 2, 9) lists one burial (burial 1) as found in a cultural layer, and the other (burial 2) found within structure 57, in a round pit, with skeletal remains lying on the back, legs bent at the knees. It is safe to assume then that these burials were located within the settlement, making the necropolis intramural.

Further west, at the site of Bezdan in Bački Monoštor, rescue excavations yielded three skeletal burials that belong to the late Neolithic period. Two burials, marked 1 and 2, were found within structures with Late Neolithic pottery, burial 1 being in a flexed position on the right side and belonging to a middle-aged woman who was 158.58 cm tall, whilst inside burial 2, two individuals were discovered, an old adult in a flexed position and a poorly preserved child. The sexing of the adult individual in burial 2 was impossible due to inconclusive markers on bones (Jovanović et al. 2021, 238). The only radiocarbon-dated burial is burial 3, a middle-aged male individual found in what appears to be a ditch, buried on his back, with legs bent to the right. This individual showed various signs of pathology on his bones and even an osteoma on the frontal bone, which could indicate poor health and immobility. This site is also a clear example of an intramural necropolis. The radiocarbon dating of burial 3 (BRAMS-2416, 6028±27 BP) suggests a somewhat later time span from 4996–4844 calBC (95.4% prob.), roughly corresponding to the Vinča C period (Jovanović et al. 2021, 236); however, this need not be the case for burials 1 and 2 as well.

Finally, in 2016 and 2017, on the site of Idjoš Gradište, near the town of Kikinda, two more human skeletal remains were discovered in two different locations of the Late Neolithic settlement, one radiocarbon-dated to the 53rd–52nd century calBC, the other to a later period, the 49th to 47th century calBC (Marić et al. 2025, 191). The site, consisting of several multiple-period settlements ranging from the Middle Neolithic to the late Bronze Age (Marić et al. 2016), contains, in its southwestern part, a Neolithic settlement with a smaller tell accompanied by a flat settlement abutting it on the northeast. Human burials were detected in trenches 5 and 6, with the first located in the flat part of the Neolithic settlement and the second in the Late Bronze Age settlement area abutting the Neolithic settlement area from the northeast. Burial 1/2016 (MAMS-31117, 6160±25 BP, BRAMS–2415, 6158±27 BP), found in the Late Neolithic part of the site, was radiocarbon-dated using Bayesian chronological modelling to the early phase of the Late Neolithic settlement, or 5128–5052 calBC (95.4% prob.), whilst burial 1/2017, found in the Late Bronze Age Settlement (two samples were taken, KIA–51802, 5966±28 BP and KIA–51805, 5991±25 BP), was dated to 4995–4863 calBC (95.4% prob.) (Marić et al. 2025,

191). Whilst it may appear that this is one intramural (early phase) and one extramural (late phase) necropolis, the early phase intramural burial position is still unclear. Radiocarbon dates of the settlement contexts of a pit dwelling found in the same trench, marked burial 1/2016, indicate that the formation of the flat part of the Late Neolithic settlement started 5065–5016 BCE (95.4% prob.), at the earliest (Marić et al. 2025, 190). This would place the early phase burial a generation or two before the construction of the pit dwelling in trench 5. Such development could imply that the impetus for the creation of the late phase necropolis outside the Late Neolithic settlement perimeter may have been the actual spread of the late phase of the Late Neolithic settlement beyond the borders of the tell.

Conclusion

Comparing the Sajlovo burials with known examples from other sites of the Late Neolithic Vinča period reveals some parallels with burial 2 found in Zmajevo Livnice and burial 2 from the Gornja Šuma site (Jovanović et al. 2021). The individuals from burial 2 in Zmajevo Livnice and Gornja Šuma burial 2 were buried within pit structures, and to these examples' burials 1 and 2 from Bezdan in Bački Monoštor can also be added, even though they have yet to be radiocarbon-dated. The radiocarbon date span of 5299–5099 calBC (95% prob.) for burial 2 in Zmajevo aligns perfectly with the dates from Sajlovo, identical to the AMS radiocarbon dates from Gornja Šuma found in 2007 (Jovanović et al. 2021), which would place these burials in the same chronological period.

The examples of the early Vinča period inhumation burials outside pit features, like the burial at 8.75 metres at Vinča Belo Brdo, or burials 1 and 4 from Gornja Šuma, are, whilst still intramural burials, a specific subset of finds, probably similar to the finds of inhumed individuals located between structures inside the settlement, better known and more common in the territory of the eastern LBK communities, e.g., graves 27 and 28 from Öcsöd-Kováshalom (Raczky 1987, 67). However, the chronological span of burials 1 and 4 from Gornja Šuma corresponds to the Sajlovo ones, indicating that even if such finds were not attested in Sajlovo 5, it could perhaps be due to the extensive multiperiod character of the site, which could have led to the destruction of these types of Late Neolithic graves by later habitation practices.

The positioning of the bodies, in a flexed position on their left or right side, evidenced in the Starčevo-Körös period, also continues in the early Vinča culture, supporting the idea of continuation of the burial practice established in the previous period. The occasional appearance of different body positions, like burial 3, discovered in Bezdan, Bački Monoštor, most likely represents a peculiar case rather than an alternative manner of burial positioning. A study

performed in Hungary on the burials discovered at Aszód-Papi (Siklósi 2013, 67–69) showed that the vast majority of burials contained the deceased lying on their right side (84.2%), whilst only 10.9% were lying on the left side, and merely 3.8% were found in supine position. Furthermore, this research linked supine burial with female individuals, in contrast to the male found in burial 3 in Bački Monoštor and the male burial 1/2017 from the potential extramural necropolis of Iđoš Gradište, which could potentially signify a major difference between these burials and the *common* type ones. In the same study, another example, the burials found at Berettyóújfalu-Herpály, showed that the positioning of bodies on the left or right was roughly equal (Siklósi 2013, 127), suggesting that there appears not to be a dominant rite in the Late Neolithic of the Pannonian plain. However, the number of examples is still limited, and more burials would be needed before a clear rule can be extrapolated with certainty.

The practice of burial goods and offerings, for which mixed evidence exists already in the Early/Middle Neolithic Starčevo-Körös period, appears not to have become a dominant occurrence in the early part of the Late Neolithic Vinča period, at least according to the known examples, which are, admittedly, still scarce in the area of the Vinča material record. No obvious grave goods can be identified in the Sajlovo burials, and this fits into the narrative of the early/middle Neolithic burial practices, where burials in pits without grave goods are also known to exist. A study conducted in Hungary (Siklósi 2013, 69–70) on multiple Late Neolithic necropoles shows that up to a quarter of discovered burials did not contain grave goods in certain necropoles.

The available evidence suggests that the practice of pit burials within the settlement and its features, typical of the Middle Neolithic Starčevo/Körös phase and evidenced on sites like Jaričište 1, Vinča Belo Brdo, Zlatara, Rudnik Kosovski, Blagotin, Obrež baštine and Golokut-Vizić, continued uninterrupted into the early period of the Vinča culture, as can also be seen in the Sajlovo Late Neolithic burials. Such a practice can be interpreted as evidence of clear continuity of population and the burial traditions in the northwestern Balkans between the Early/Middle and the Late Neolithic Period. These traditions continued, at least according to radiocarbon dating, until the turn of the 6th millennium calBC, when extramural necropoles started to appear, such as those in Gomolava (Borić 2009, 225) and perhaps the one in Iđoš Gradište, albeit still represented by a single, supine burial (Marić et al. 2025, 194). By the first centuries of the 5th millennium BC, extramural necropoles also appear in the neighboring LBK communities (Siklósi 2013), quickly becoming the main form of burial organisation. The lack of known extramural necropoles in Serbia, particularly in its central and southern parts, is nothing but the consequence of the limited archaeological research performed on Vinča period settlements, which tends to focus on wattle and daub structures within settlements, rather than try-

ing to identify ephemeral features outside of settlement enclosures that may or may not turn out to be inhumation burials.

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The Balkan Linguistic and Cultural Union: A Holistic Research Program

Abstract: The article[1] proposes a new research program on the Balkan linguistic and cultural union (Balkan Sprachbund and Kulturbund), based on a novel definition of linguistic and cultural union as a group of non-related languages and cultures connected by regular functional correspondences, akin to the presence of regular sound correspondences between languages as a diagnostic feature in the theory of language kinship. It suggests considering diagnostic and union-forming features, correspondences in inventories and rules of distribution of functions of units and categories across different languages and cultures, to test the hypothesis of their inclusion in a linguistic and cultural union.

After a brief overview of the current state of affairs in the scholarly literature on the subject, the article proposes a structured list of 160+ selected polyfunctional categorical features, pertaining to different structural levels of language and culture and presumably demonstrating regular interlinguistic and intercultural Balkan correspondences. The detection of regularity in correspondences and, consequently, the formulation of a hypothesis regarding the existence of a linguistic union with prognostic power is suggested as a possible avenue for resolving the theoretical issue of providing rigorous evidence, through methods of the humanities, of the existence in the history of humanity of a particular type of convergent development of idioethnic languages and cultures, and the observed result of such development — linguistic and cultural unions as distinct language groups (distinct from language families) and distinct cultural associations.

Keywords: linguistic convergence, cultural convergence, Sprachbund definition, Balkan linguistic area, methods of linguistic research, methods in cultural anthropology, regular correspondences in function, polyfunctionality.

The peoples and ethnic groups of Southeastern Europe, diverse in origin and genealogical ties, are united by a centuries-old, shared history and deep ethnocultural interaction, including intense linguistic contacts and lasting and widespread multilingualism. The outcome of this interaction is observed in the form of a specific convergent linguistic and cultural landscape, the explanation of the causes and the establishment of the mechanisms of which pose

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[1] The article utilizes, clarifies, supplements, and significantly expands upon the text and ideas of the author as outlined in Sobolev 2024 (in Russian).

a serious challenge for the humanities. In recent years, linguistic and cultural-anthropological studies in the field of the convergent development of Balkan languages and cultures have increasingly turned to the search for an external determining material, the biological substrate of this convergence, at least in the form of testing the hypothesis on the mutual correlation of genetic, linguistic, and cultural development (Stamatoyannopoulos et al. 2017; Matsumae et al. 2021; Olalde et al. 2024).[2] The arbitrariness of the connection between biological, cultural, and linguistic development is unquestionable for us. However, the second dominant mainstream direction in the study of convergent development of languages and cultures turns to the question of the possibility of establishing correlations and even regular relationships of causality between external social and cultural-anthropological parameters of a specific contact situation on the one hand, and the characteristics of the interacting languages and cultures, processes of linguistic and cultural variability and change in contact, and the linguistic and cultural outcomes of contact on the other. It is evident that the results of contact-induced development are not always recognizable against the backdrop of internally conditioned, independent development. Moreover, during many years of synchronic study of Balkan languages and cultures, no typologically unique features of Balkan bilingualism and language contact situations were found, and it was impossible to establish the causality of the convergent development of Balkan languages with the observable characteristics of bilingualism and language situations (Sobolev 2021). It was found that the linguistic situation itself does not possess predictive power regarding expected (possible or obligatory) linguistic changes within it, while areal structures have greater predictive power (the position of an idiom within the circle of neighbors predetermines its intralinguistic properties, cf. the predictive power of the position of a periodical element in Mendeleev's table), and the characteristics of the ethnolinguistic groups themselves can be ambivalent. Like other social and cultural-anthropological parameters, the linguistic situation proves to be a useful yet descriptive rather than explanatory category.

When studying the specific convergent linguistic and cultural landscape of Southeastern Europe, methods and approaches from the humanities are applicable quite successfully. In particular, this region has been at the center of

[2] Consider non-trivial principles for selecting genetic material in research (Olalde et al. 2024, 5479): "…genetic material from 37 unrelated present-day Serb male individuals from Serbia (n=19), Montenegro (n=7), Croatia (n=5), North Macedonia (n=1) and Bosnia and Herzegovina (n=5). Serb individuals were selected according to the following criteria: 1) Self-declared Serbs living on territories of former Yugoslavia where they historically lived. 2) Speakers of the Serbian language. 3) Belonging to families that are or were in the past of Orthodox religion. 4) Knowing or still celebrating their family's Home patron saint, a cultural practice that is characteristic of Serb identity".

theoretical discussions since the early 20th century regarding the principles of identifying and the properties of language unions, and the Balkan Linguistic Union, or Balkan Sprachbund, has been recognized as a prototypical case of a convergent group of languages, although Balkanists have yet to reach a consensus on either the inventory of so-called Balkan linguistic features (Balkanisms) or their areal and intrasystemic distribution. According to the classical definition by N. S. Trubetzkoy (1928), a linguistic union is a group of non-related languages that exhibit significant similarity in syntax, morphology, and sometimes phonetic resemblance, and share a common stock of cultural words but are not connected by a system of phonetic correspondences and inherent elementary lexicon. Balkan languages precisely fit this description. Features commonly considered characteristic of the Balkan linguistic union include the mid-level mid-rise vowel, the post-positive article, object doubling, the convergence of means expressing the benefactive and possessive roles, the loss of the infinitive replaced by the subjunctive, the formation of the future tense using a marker derived from the verb 'to want', shared phraseology, and shared lexicon of Paleo-Balkan, Greek, Latin, Slavic, and Turkish origin. Analogously to linguistic unions, one can assume the existence of cultural unions (Burkhart 2014). Comparing individual Balkan languages with their related languages outside this region allows us to interpret Balkanisms as common linguistic and cultural innovations that occurred specifically in the Balkans. However, it is also necessary to acknowledge that pan-Balkan linguistic features manifest differently in various variants of each individual language, and multilingualism operates differently in different regions and small areas.

The completion of the descriptive stage of Balkan studies in the 20th-21st centuries has allowed the transition from listing brief inventories of the most important similarities (Kopitar 1829; Miklosich 1861) and lists of hundreds of interlinguistic parallels (Sandfeld 1930; Asenova 1989) to overcoming research atomism and establishing rules for the distribution of inter-Balkan similarities and differences in diachrony and diastratic variation. This transition has led to the formation of an understanding of the complexity of the Balkan linguistic area and the multitude of its major and minor components, the areal distribution of similarities and differences among Balkan languages (MDABL 2003–2018; Adamou, Sobolev 2023), and the compilation of dictionaries of pan-Balkan lexemes. With the advent of the digital age, it became possible to represent all the ethno-linguistic diversity of the region, including its dynamics (Gorlov et al. 2023). In the 21st century, "more light has been shed on the specific historical reasons for the convergent development of languages on the Balkan Peninsula" (Desnitskaya 1990). In particular, a significant shift in this area is associated with the implementation of a broad, integrative, holistic approach to language and culture, uniting the efforts of linguists, ethnographers, and cul-

tural anthropologists, rather than a narrowly specialized and methodologically limited approach.

Against this backdrop, the shortcomings of nomothetic explanatory approaches to linguistic unions in general have become evident, leading to aporias regarding the number of languages necessary and sufficient for recognizing a certain group as a union, and to the impossibility of establishing its (geographical) boundaries. Attempts to reduce the "Balkan linguistic type" to common communicative characteristics of oral speech, analyticity, redundancy, ambivalence, and ultimately to hierarchies of borrowing have also proven to be of little utility. It is telling that even searches for language donors of linguistic Balkanization (i.e., the acquisition during the joint development in the Balkan region of so-called Balkanisms — convergent features recognized as union-forming) have not yielded convincing results. Nevertheless, the agnostic approach advocated by a number of specialists in Balkan languages (P. Hr. Ilievski, V. Friedman, B. Joseph) cannot be acknowledged as having heuristic value. The continued search for evidence on the origin of specific union-forming features should remain one of the goals of Balkan linguistics.

The theory of linguistic union has unexpectedly become entirely unclaimed in contemporary Western European Balkan studies, interpreting the Balkan region as a non-unique subregion of Europe. However, the concept and theory of linguistic union are not used for areas outside Europe either (Enfield 2003), shifting the focus to the crucial concept of polyfunctionality of linguistic units and categories for understanding the mechanism of union formation. Furthermore, in Western linguistics, the notion of "Sprachbund" or "linguistic union" has been deconstructed and replaced by the heuristic value of "linguistic area" (Campbell 2017). The existence of such a prototypical union as the Balkan one is disputed (see, for example, WALS), and politically motivated "linguistic unions" such as the "West European Union of Charlemagne" are simultaneously introduced into scientific discourse (Haspelmath 2001). In English-language linguistic literature, objections have been raised against the use of the term "union," suggesting that it implies agency, the activity of languages "voluntarily entering" into special relationships and choosing this "option," with calls to replace it with a "more appropriate" term. Strangely enough, this interpretation fails to take into account the speakers themselves (i.e., the speakers of interacting languages and cultures), who, according to their individual and collective ethical principles, possess both subjectivity and agency for any actions during linguistic and cultural interaction (cultural dialogue).

With the rejection of the concept and theory of linguistic union, the results of language contacts are usually considered primarily in terms of borrowing (of varying degrees of adaptation by the recipient language), code-switching, the emergence of a "grammar of bilinguals," broadly understood linguistic con-

vergence, the emergence of creole languages and pidgins, hybridization, and the formation of mixed languages (O'Shannessy 2021). In a recent comprehensive overview of the issues related to convergence and linguistic union concepts in Western linguistics, the aporias inevitably arising from the loose definition of linguistic unions are summarized, leading to negative conclusions about the "lack of internal value" of the "labels" "linguistic area" and "Sprachbund," and the absence of a "method that would allow establishing linguistic unions (areas) as entities distinct from a random set of languages. Thus, ultimately, areas are established by linguists" (Wiemer 2020, 182–183). Broadly speaking, the generalizations in the field of linguistic contactology are pessimistic: "Specialists in language contact, however, find it difficult to 'tease apart' the processes which led to the emergence of a Sprachbund, leaving the issue unresolved" (Muysken 2013, 726). It is worth noting that the comprehensive review of convergence mechanisms still remains atomistic in scholarship and has not led our colleagues to establish regular (i.e., systematic and predictable) relationships between languages. It can be said that contemporary linguistics outside Russia oscillates between denying such a linguistic entity as a linguistic union and constructing new linguistic unions without proper grounds (sometimes as part of a larger geopolitical projection).

The definition proposed by N. S. Trubetzkoy does not imply the presence of regular, systematic correspondences between the languages that constitute a linguistic union. The lack of a strict definition and incontrovertible evidence for the existence of linguistic unions complicates the very formulation of the task for experimentally testing all scientific hypotheses about the causes, course, mechanisms, and outcomes of linguistic and cultural convergence worldwide and in its specific regions. Also challenging is the purposeful, theoretically oriented collection of authentic, quantitatively and qualitatively relevant, demonstrative primary material on the languages and cultures of the world's peoples. According to the new definition of a linguistic and cultural union, i.e., a convergent group of languages and cultures (Sobolev 2021; 2024), its diagnostic features should be considered as regular, systematic functional correspondences between languages and cultures by analogy with the presence of regular phonetic correspondences, or sound laws between languages as a diagnostic feature in the theory of language kinship. Functional correspondences, or functional laws, should be recognized in the inventories of broadly understood functions (rules of distribution and meanings) of units and categories of different languages that are presumably part of a linguistic union. Thus, the question arises as to whether linguistic and cultural unions are speculative constructs of linguists and anthropologists or an ontological reality, i.e., existing groups of languages and cultures linked by systematic relationships. In this context, languages and cultures that coexist in the same area, thus being combined into a single properly geographical, areal group,

may converge (in whole or in part) into a special areal-typological group, i.e., forming a linguistic union; it is also conceivable to allow for the disintegration of a linguistic union into a properly geographical group of languages.

The results of two projects have laid a sturdy foundation for resolving theoretical issues in the field of historical linguistics and cultural anthropology as a whole, particularly Balkan linguo-cultural anthropogeography. Alongside the ongoing "Minor Dialectological Atlas of Balkan Languages, MDABL," a new opportunity to explicitly demonstrate a sufficient number of regular functional correspondences between the languages of the Balkan-Carpathian region is provided by the digital Russian-French "Atlas of the Balkan Linguistic Area, ABLA" (https://abla.cnrs.fr). The latter involves the development of an online database of contact linguistic phenomena and filling it with primary data attested in Balkan languages. ABLA includes around 100 phonological, morphological, morphosyntactic, syntactic, semantic, and lexical features, as well as sociolinguistic characteristics (https://abla.cnrs.fr/features). All features are plotted on a geographical map covering over 60 populated places; each map is accompanied by research commentary. Numerous and complex convergence processes are presented in ABLA based on material significantly exceeding what is currently available in scientific literature.

The problem posed in this article is resolved at a general theoretical level by proving the hypothesis of regular, non-random functional correspondences between languages and cultures as a diagnostic feature of linguistic and cultural unions. In terms of areal typology, the problem is solved by identifying regular, systematic interlinguistic and intercultural correspondences between languages in various areas of Europe, Eurasia, and the world, presumably forming or having formed linguistic unions in the past. In what follows, this article presents the idea of a holistic investigation program of the languages and cultures of the Balkan area aimed at substantiating the hypothesis put forward and forming a theory of linguistic union that possesses predictive power, including in the realm of implicational relationships between phenomena at different levels of language and culture. In its experimental, selective version, the program comprises over 160 questions.

Structural level	Feature (characteristic, category, unit)	Value (expected correspondence or linguistic variant (dialectal difference))
Suprasegmental phonetics	Phonologically relevant length	1. Presence ~ absence 2. Inventory of units (length, half-length, shortness, extra shortness, additional sound appended to the main one) 3. Lexico-etymological restrictions (original, borrowed lexicon; markedness) 4. Distribution restrictions and rules at the word and phrase level
	Phonologically relevant tones	1. Presence ~ absence 2. Inventory of units (rising, falling, acute, etc.) 3. Lexico-etymological restrictions (original, borrowed lexicon; markedness) 4. Distribution restrictions and rules at the word and phrase level
	Nasality	1. Presence ~ absence 2. Distribution of the feature across inventory units 3. Lexico-etymological constraints (native, borrowed lexicon; markedness) 4. Distribution constraints or rules at the word level
	Non-orthotonically units (phonetic *en*clitics)	1. Presence ~ absence 2. Inventory of units (pronouns, verbs, particles including subjunctive) 3. Distribution constraints and rules 4. Stress on phonetic enclitics
Segmental phonetics and phonology	Vowel sounds and phonemes [y], /y/, [ɛ], /ɛ/, [ɔ], /ɔ/, [ə], /ə/, etc.	1. Presence ~ absence in the inventory 2. Positional constraints and rules of distribution under stress (initial position; final position) 3. Positional constraints and rules of distribution under stress in morphemes (in the root; in derivational morphemes; in inflectional morphemes) 4. Positional constraints and rules of distribution outside of stress in orthotonic words 5. Positional constraints and rules of distribution outside of stress in clitics (pronominal, verbal, subjunctive particles) 6. Positional variant of other vowel phonemes 7. Free variant, doublet of other vowel phonemes 8. Functions in morphophonological alternations (derivational, inflectional) 9. Marker of religious affiliation, social group, gender, bilingualism factor (L2 proficiency), etc. 10. Marker of borrowings, e.g., Turkisms, Romanianisms, Albanianisms, Slavicisms 11. Marker of expression, speech style

	Diphthongs	1. Presence ~ absence 2. Rising ~ falling 3. Monophthongization rules 4. Diphthongization rules 5. Functions in morphophonological alternations 6. Marker of borrowings, for example, Romanianisms, Albanianisms
Consonants	Simple consonants Palatal and palatalized consonants	1. Presence ~ absence in the inventory 2. Functions in morphophonological alternations (singular ~ plural nouns; verb inflection)
	Affricates	1. Presence ~ absence in the inventory 2. Functions in morphophonological alternations (singular ~ plural nouns; verb inflection) 3. Marker of religious affiliation, social group, gender, bilingualism factor (L2 proficiency), etc. 4. Marker of borrowings, for example, Turkisms, Romanianisms, Albanianisms, Slavicisms
Grammatical categories	Gender	1. Distribution of gender grammemes across parts of speech and lexical-grammatical groups (including grammatical clitics) 2. Distribution of gender grammemes across numbers
	Negation	1. Adnominal (with negative meaning, with meaning 'bad, wrong') 2. Verbal, indicative 3. Verbal, subjunctive 4. Verbal, imperative 5. Verbal, evidential 6. Nominal forms of the verb 7. Interjection
Grammatical categories of nominal parts of speech	Case of the possessor and beneficiary	1. Presence ~ absence of formal agreement in nouns 2. Presence ~ absence of formal agreement in full-form, othotonic pronouns 3. Presence ~ absence of formal agreement in pronominal clitics
	Cardinal numeral, adjective, and pronoun 'one' and indefinite article	1. Presence ~ absence of formal matching for all genders 2. Presence ~ absence of formal matching for plural 3. 'first'

	Definiteness (definite article)	1. Presence ~ absence of form 2. Position relative to the head (left, right) 3. Position in a two-member attributive phrase (as the first, second member) 4. Position in a two-member possessive phrase (as the first, second member) 5. Presence of gender, number, and case (inflection) 6. Article as a marker of genitive (possessive) relationship in the phrase 7. Hyperbolic, double definiteness (usage with demonstrative pronouns, in attributive phrases, with proper nouns, toponyms) 8. Omission ~ obligatoriness in terms of kinship despite referentiality 9. Omission ~ obligatoriness in prepositional constructions despite referentiality
	Comparative	1. Presence of the comparative grammeme 2. Matching of the comparative and superlative grammemes 3. Distribution of the comparative grammeme across parts of speech 4. Non-comparative meanings of the comparative grammeme (e.g., Macedonian *edna postara žena* 'a moderately aged woman, not very old')
Grammatical categories of the verb	Aorist	1. Presence ~ absence of form 2. Functional spectrum (basic function of 'aorist'; expression of a sequence of actions; use in subordinate clauses; duration or iteration; immediate future; gnomic use; conditional; conclusion) 3. Compatibility with the subjunctive particle 4. Compatibility with the future particle
	Imperfect	1. Presence ~ absence of form 2. Functional spectrum 3. Compatibility with the subjunctive particle 4. Compatibility with the future particle
	Perfect	1. Presence ~ absence of form 2. Functional spectrum (resultative, experiential, hot news past, mirative, reportative, optative) 3. Compatibility with the subjunctive particle
	Auxiliary verb 'to want'	1. Presence ~ absence of formal agreement between the main verb and the auxiliary verb (in negation and without) 2. Functional spectrum (in the future tense without negation, with negation, in the form of future tense in the past) 3. With the meanings 'must', 'to be required'
	Auxiliary verb 'to have'	1. Presence ~ absence of formal agreement between the main verb and the auxiliary verb 2. Functional spectrum (in the future without negation, with negation, in the form of future tense in the past) 3. Component of periphrastic verbs

	Subjunctive	1. Presence ~ absence of verbal form 2. Compatibility with a specialized particle (obligatoriness, optionality) 3. Formal-functional spectrum (complement of modal verb, phase verb indicating the beginning and completion of action) 4. Functional-semantic spectrum (condition, imperative, preterit) 5. Compatibility with other particles (full and short subjunctive) 6. Functional-semantic spectrum of combinations with non-subjunctive particles
	Infinitiv	1. Presence ~ absence of form 2. Functional spectrum (complement of modal verbs, phase verbs, part of the future tense form (including negation), imperative, prohibitive (including part of the form), head of the noun phrase (subject))
	Participle	1. Presence ~ absence of form 2. Functional spectrum (attribute, perfect, privative ('without', cf. Macedonian *ušte nedojden* 'he hadn't arrived, when'))
	Deverbal noun	1. Presence ~ absence of form 2. Head of the noun phrase (verbal government, nominal government) 3. Dependent part of the noun phrase 4. Main part of the complex predicate construction 5. Dependent part of the complex predicate construction 6. Tests for negation, for passivization (object/patient topicalization), for object control (nominal/verbal), for compatibility (with adjective/with adverb), for embedding in a dependent clause, for constituent permutation including embedding
Grammatical clitics	Grammatical clitics	1. Presence ~ absence of category 2. Inventory by parts of speech 3. Positional distribution (relative to the absolute beginning of the sentence; relative to the first orthotonic word; relative to the verb; in clitic clusters; in negation) 4. Grammatical roles and functions
Traditional culture	Calendar, for example St. George / Hıdırellez St. Demetrius Christmas Spring Day	1. Presence ~ absence of ritual 2. Name of the day 3. Date 4. Ontology of rituals 5. Functional spectrum of rituals (apotropaic, symbolic, identity-related, and other functions)

	Rituals, for example Sacrifice Ritual fire	1. Presence ~ absence of the ritual 2. Name of the ritual 3. Chronotope of the ritual 4. Ontology of the ritual (selection of sacrifice, prayers, slaughter, consumption, offering) 5. Functional spectrum of the ritual (apotropaic, symbolic, identity-related, and other functions)
	Birth, naming ceremony, protection against the evil eye	1. Semantically transparent names 2. First visit to a new mother 3. Ritual objects of native rituals 4. Prediction of the newborn's fate
	Spiritual fraternity	1. Presence ~ absence of the phenomenon 2. Ontology of the ritual 3. Functions of the spiritual brother in the life cycle 4. Semantics of fraternity 5. Spiritual sorority
	Godparenthood	1. Presence ~ absence (masculine and feminine) 2. Ontology of the ritual 3. Functions of the godfather/godmother in the life cycle 4. Semantics of godparenthood
	Wedding: Agents Bride Groom Father-in-law Mother-in-law Bride's maid of honor Groom's brother-in-law Father-in-law Mother-in-law and others	1. Names at different stages of the ceremony 2. Functional valencies throughout the entire wedding ceremony (for example father-in-law: going to propose to the bride; meeting the wedding procession; giving money to the bride's side as a dowry so they let the wedding procession pass; showering the bride with candies; going with the bride's party to fetch the bride, leading the bride out of her parents' house, and accompanying her during the move to the groom's house) 3. Ritual objects 4. Clothing
	Wedding: Objects Wedding tree Flag	1. Names at different stages of the ceremony 2. Ontology 3. Functional valencies (throughout the entire wedding ceremony)
	Wedding: Chronotope Bride's house Procession Groom's house	1. Names at different stages of the ceremony 2. Functional valencies
	Funerals and Demonology	1. Deceased: names 2. Protective rituals: ontology 3. "Resurrected dead": names 4. "Resurrected dead": harmfulness 5. "Resurrected dead": protective rituals

	Elements, Substances, Objects Fire, Water, Air, Earth Bread, Rice, Meat, Wine, Milk	1. Names 2. Ritual: ontology 3. Functional spectrum of the ritual (apotropaic, symbolic, identity-related, and other functions)
	Loci	1. Names 2. Rituals: ontology 3. Functional spectrum of the ritual (apotropaic, symbolic, identity-related, and other functions)
	Processions	1. Names 2. Rituals: ontology 3. Functional spectrum of the ritual (apotropaic, symbolic, identity-related, and other functions)
	Demonology House spirits Water spirits Air spirits and so on	1. Names 2. Harmfulness 3. Usefulness 4. Worship or protection rituals: ontology 5. Functional spectrum of the ritual (apotropaic, symbolic, identity-related, and other functions) 6. Apotropaics
	Phytonymy	1. Plant names 2. Collection or cultivation 3. Collection/cultivation purposes (for aesthetics, household needs, rituals, or for sale) 4. Uses in food, household items (fabrics, bedding, curtains, etc.), and folk medicine 5. Usage in rituals and ceremonies (bouquets, wedding trees, home decoration, structures, enclosures, humans, sacrificial animals) 6. Usage in clothing 7. Location of usage 8. Time of usage 9. Color symbolism (as a color identifier, as a symbol)
	Headwear Men's Women's Children's	1. Names 2. Functions in daily life 3. Ritual functions 4. Symbolic functions 5. Rules of donning, wearing, and removing 6. Prohibitions related to headwear

The project adopts a synchronic orientation: responses to linguistic inquiries and questions pertaining to traditional culture are expected to encompass the period from the early 20th century to the present day. The research is grounded in the domains of internal linguistics and structural linguoculturology, deliberately excluding engagement with various sociolinguistic frameworks, including the concept of translanguaging.

The project envisions the development of a corpus comprising both qualitatively and quantitatively relevant primary linguistic and historical-cultural data, derived through the excerption of published and archival sources. It will also involve a series of corpus-based and structural-grammatical experiments (tests) with data from the Balkan languages. Additionally, a digital tool will be created to enable the attribution, input, glossing, translation, commentary, systematization, and, where appropriate, cartographic visualization of data pertaining to Balkan languages and cultures, thereby facilitating interlinguistic and intercultural comparison.

The project intends to draw upon a wide array of sources of high-quality primary data, including comparative and contrastive grammatical studies of Balkan languages; grammatical and phonetic-phonological descriptions of standard Balkan languages; monographic investigations of specific multifunctional grammatical categories within these languages; grammatical and phonetic-phonological descriptions of Balkan dialects; corpora of Balkan languages and dialects; as well as anthropogeographical, ethnographic, and cultural-historical sources pertaining to Balkan cultures.

The scholarly significance of these issues is fundamental. Their resolution stands to make a substantial contribution to the global advancement of linguistic and ethnological research on Sprach- und Kulturbund phenomena, in both theoretical and applied dimensions, including the development of research technologies. The theoretical, methodological, technological, informational, and practical outputs of the project are poised to establish a new global benchmark for contemporary scholarly inquiry.

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A Neverending Story – The Utilisation of Language as a Political Instrument: National and Language Policy of Austria-Hungary in Bosnia and Herzegovina

Abstract: This article focuses on the content of language and national policy in Bosnia and Herzegovina during the Austro-Hungarian administration. It is based on documents, articles in official newspapers and insights into the activities of national and confessional societies and their journals. In this context, i.e. the cultural and national policy of the new government, education and publishing are highly significant. In order to foster a unified national consciousness, the Austro-Hungarian authorities implemented a range of policies, including one standard language, the promotion of a collective sense of national identity, and the establishment of institutions to serve the unified nation. For instance, the census was conducted solely based on religious affiliation, with no consideration of ethnic affiliation. The establishment of a unified national identity was further pursued through the conceptualisation of the glottonym "Land Language" (*zemaljski jezik/ Landessprache*). From the outset, the name of the language indicated a significant potential for conflict. These debates, primarily conducted in the press of various profiles and in the Diet of Bosnia and Herzegovina in Sarajevo, are pertinent to this analysis. The early 20th century was characterised by deliberate and seemingly indifferent deliberations in parliament on language policy and an ongoing discourse surrounding the South Slavic question, which had been a subject of discussion within the Monarchy for some time, and assumed increased importance for Bosnia and Herzegovina. Moreover, it was a period characterised by an escalation of social unrest. In 1913, the discourse on language policy entered its concluding phase. The legislation confirming the glottonym "Serbo-Croatian" with the use of two scripts in Bosnia and Herzegovina was enacted in January 1914. This was achieved through the synchronisation of the language name with that introduced in the other parts of the Monarchy during the 19th century. A mere six months later, the First World War broke out.

Keywords: Bosnia and Herzegovina in the Austro-Hungarian Monarchy, glottonymy, language policy, national versus confessional.

The Habsburg Monarchy had several internal and external official languages in the Austrian part (Cisleithania) of the Empire: German, Hungarian (Magyar), Polish, Czech, Ruthenian, Croatian, Italian, Romanian, Serbian, Slovak, and Slovenian.[1] The Slovak language was most frequently recorded together

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[1] The following information is provided on the official website of the Austrian Parliament: "From German to Czech to Croatian – in the Habsburg Monarchy at the end

with Czech as Czech-Slavic or Bohemian-Moravian-Slovak, and Italian as Italian-Ladino, depending on the period. In later censuses (from 1880), Serbian and Croatian were listed together as Serbian-Croatian in the Austrian part and as individual languages in the Hungarian part of the Dual Monarchy. Consequently, there were nine languages according to the majority of official documents. In practice, there were disagreements about which of these languages were used in which areas, but the Monarchy fostered a multilingual tradition in education and publishing (schools, press, printing). In addition, some were designated official languages, while some, with limited vocabularies, were considered languages in the context of the military. Depending on the number of speakers and their economic and cultural presence, it could be a colloquial or family language, but also a language of education in private or public schools, as well as an administrative language.

During the last few decades of the Monarchy's existence, its education policy suffered upheavals amidst national conflicts of interest. The language of instruction in primary or secondary schools was sometimes a question of religion. Choosing the language of instruction became a way to symbolically define the national identity of a community.[2] The Constitution of 1867 defined the language issue in Cisleithania as the "inviolable right to preserve and protect nationalities and languages", guaranteeing the use "of a common Land language[3] in school, administration and public life".[4] This formulation was by no means met with unanimous approval, neither within the Monarchy nor abroad. Around 1900, the Austrian Prime Minister stated that the language

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of the 19th century there were nine common languages [...]: German, Czech, Polish, Ruthenian, Slovenian, Croatian, Serbian, Italian, Romanian and Hungarian". https://www.parlament.gv.at posting at 26 February 2024. The website of the House of Austrian History supplies this information on Austria's current language policy: "In the Habsburg Monarchy, multilingualism was the rule; there was not just one, but nine official languages (German, Hungarian, Bosnian–Croatian–Serbian, Italian, Polish, Romanian, Ruthenian, Slovenian and Czech)". https://hdgoe.at/ These two statements do not align with the facts about language policy in the Habsburg Monarchy.

[2] The Revolution of 1848 could be considered the actual birth of the fundamental renewal of the Austrian education system. The education reform of Graf Thun (1848–1853) put great emphasis on teaching in the mother tongue, especially German. This reform created the conditions for the social and civic rise of the bourgeoisie in the Austro-Hungarian Empire, even though tuition fees rendered higher education a privilege of wealthy strata.

[3] See note 28.

[4] "Staatsgrundgesetz vom 21. Dezember 1867 über die allgemeinen Rechte der Staatsbürger," RGBI Nr. 142/1867, Art. 19, *Reichs-Gesetz-Blatt für das Kaisertum Österreich* (Vienna, 22 December 1867), 92–94.

issue was causing "stagnation across all areas of public life".[5] During his travels in Europe, Mark Twain attended a parliamentary session of the Dual Monarchy. In one of his texts, Twain wrote of his dismay at the multilingual practices of those accustomed to monolingualism.[6] In reviewing the minutes of the sessions in the Vienna Parliament, the following phrases are particularly striking: "The member of parliament begins his speech in … language, and then continues in German". Nevertheless, regardless of how long a delegate had spoken in his native language beforehand, anything that was not said in German was not included in the stenographic notes. Stjepan Mitrov Ljubiša, a Serbian politician and writer and the representative of Dalmatia, was the first person to deliver an entire speech in a language other than German in the Viennese Parliament. On 11 September 1861, before the Constitution of 1867 was promulgated, he delivered his speech in Serbian.[7] Subsequently, Ljubiša provided a German translation of his speech for the parliament. This ensured that the content was accurately documented in the parliamentary proceedings and made available for debate.

> The President moves on to the agenda and gives the floor to Representative Ljubiša. He speaks Serbian and submits his speech, translated into German, together with a proposal. [...] After the President has handed this speech and the proposal in

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5 M. Glettler, "Ökonomie und Nationalismus – ein Kernproblem im multinationalen Staat. Ein Vergleich der Politik Ernest von Koerbers und Sandor Wekerles", In Gegenwart in Vergangenheit. Beiträge zur Kultur und Geschichte der Neueren und Neuesten Zeit, edt. G. Jenal, (München: Oldenburg Verlag, 1993), 239–256, 249.

6 "Broadly speaking, all the nations in the empire hate the Government – but they all hate each other too, and with devoted and enthusiastic bitterness; no two of them can combine; the nation that rises must rise alone; then the others would joyfully join the Government against her, and she would have just a fly's chance against a combination of spiders. [...] in Austria-Hungary there are nineteen public opinions – one for each state. No – two or three for each state, since there are two or three nationalities in each [...]. The House [Parliament] draws its membership of 425 deputies from the nineteen or twenty states heretofore mentioned. These men represent people who speak eleven different languages. That means eleven distinct varieties of jealousies, hostilities, and warring interests ....", M. Twain, "Stirring Times in Austria", *Harper's Monthly Magazine* 96 (March 1898), New York, 530–540, quoted in: G. Ilić Marković, "From Serbian to Serbo-Croatian and Bosnian/Croatian/Serbian in Austria: Migrant Pluricentricity Reflecting Complex Historical and Present Developments". In *Pluricentric Languages and Non-Dominant Varieties Worldwide*, vol. 1: *Pluricentric Languages across Continents — Features and Usage*, ed. Rudolf Muhr (Frankfurt am Main: Peter Lang, 2016), 442.

7 S. M. Ljubiša, *Govor poslanika na Carstvenij Savět Stefana Ljubiše, održan u sědnici 11. septembra 1861. na srpskij jezik* (Vienna 1861), 1–4, quoted in M. Tepavčević, "Jedno poglavlje crnogorsko-italijanskih jezičkih, književnih i kulturnih veza: Stefan Mitrov Ljubiša", *Studi Slavistici* XVI, no. 2 (2019), 17–36.

> German to the stenographers for recording, the motion is supported by the House. [...] The motion by Representative Ljubiša is read out again and wins the minority of the vote.[8]

In the decades that followed, representatives from other nations often referred to this precedent set by the Serbian politician, even if they only began or ended their speeches in their native language. The importance of the native language issue and the scarcity of opportunities to use it were also emphasised in a report in the Serbian-Dalmatian Almanac,[9] which claimed that in 1861 there were 33 Serbian schools in Dalmatia with 34 teachers (including one female teacher) for a total of 710 students. According to statistics, there were 78,000 Serbs that year. Apart from Budva, the birthplace of Stjepan M. Ljubiša, this region included Dubrovnik, Zadar, Kotor, and Šibenik, among other towns.

At that time, Bosnia and Herzegovina were still two provinces within the Ottoman Empire. The millet system was a framework that regulated the relationship between the political establishment and the various non-Muslim population groups. The non-Muslim demographic within the Ottoman Empire included Orthodox Christians, Armenians, Catholics, Jews and Protestants. The preservation of institutions, languages and traditions within respective communities was facilitated by this religion-based concept. The *Tanzimât* reforms and reorganization in the later Ottoman Empire increased the rights of the populace, including, in an unprecedented move, for the Empire's non-Muslims. The reforms included an administrative reorganisation, implemented through the Vilayet Law. The Bosnian Vilayet Decree was passed in 1865, with Herzegovina also becoming a separate province. The Ottoman Imperial Reform Edict from 1856 guaranteed equality in education without discriminating on religious and linguistic grounds, allowing and necessitating publishing work in minority languages. In the wake of these changes, printing houses needed to be established in each vilayet, primarily for publishing official newspapers, laws and regulations, but also for textbooks to be used in the handful of existing public

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[8] "Der Präsident übergeht ... zur Tagesordnung und erteilt dem Abgeordneten Ljubisa das Wort. Dieser spricht serbische und übergibt die Rede, in die Deutsche Sprache übersetzt, beifügend einen Antrag [...] Nachdem der Präsident diese Rede und den Antrag in deutscher Sprache den Stenographen zu Aufnahme übergeben hat, wird der Antrag vom h. Hause unterstütz. [...] Der Antrag des Abgeordneten Ljubisa wird abermals vorgelesen und bleibt bei der Abstimmung in der Minorität", "Protokoll der 53. Sitzung des Hauses der Abgeordneten des Reichsrates am 11. September 1861, Nr. 669/1861", *Stenographische Protokolle des Abgeordnetenhauses des Reichsrates 1861–1918*, 2. https://alex.onb.ac.at/cgi-content/alex?aid=spa&datum=0001&page=5215&size=45

[9] T. Petranović, ed., *Srbsko-dalmatinskij almanah: ljubitelj prosveštenija*, 21 (1862), 160–163. https://digitalna.nb.rs/view/URN:NB:RS:ND_1E4FB4FCBA9259326D92A907276464A7-1862–K021

elementary schools. The Vilayet government entrusted this task to a Serbian printer and publisher from Zemun, Ignjat Sopron, who published materials in the Cyrillic, Arabic,[10] Latin and Hebrew scripts. The linguistic landscape of Bosnia and of Herzegovina, as well as the entire Ottoman Empire, was characterised by multilingualism and the use of several scripts.[11] The first issue of the political and educational weekly *Bosanski vjestnik* [Bosnian Herald] appeared in April 1866, edited by Sopron and printed in Serbian Cyrillic. The newspaper remained in print until May 1867. From May 1866 to July 1878, Sopron's printing house published the province's official gazette, *Bosna* [Bosnia], with the two outer pages printed in Serbian Cyrillic and the inner pages in Ottoman Turkish and the Arabic script. The same establishment also printed a Serbian primer, an Ottoman Turkish grammar, books of folk poetry and several Jewish books. In 1868, the Sopron printing house in Sarajevo was renamed the "Bosnian Vilayet Printing House" at the behest of the Ottoman authorities.[12] Excluding publications in Ottoman Turkish and Hebrew, the practice of printing persisted in Serbian and utilised the recently reformed Cyrillic script and standardised grammar,[13] which was already used in publishing, administration and the education systems of Austria-Hungary and Serbia.

Austro-Hungarian Empire – Bosnia and Herzegovina 1878–1918

In the autumn of 1878, Austria-Hungary occupied these two provinces.[14] Article 25 of the Treaty of Berlin maintained Ottoman sovereignty over Bosnia and

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[10] This includes Arebica, a variant of the Arabic script used by Bosnian Muslims from the seventeenth to the early twentieth century to write their native Slavic language, notably in literature (the Alhamijado tradition), as well as in religious schoolbooks and administrative contexts.

[11] For more on the language situation in Bosnia and Herzegovina before 1878 see G. Neweklowsky, "Bosnien-Herzegowina vor 1878 zwischen Kroatisch und Serbisch". In *Herrschaft, Staat und Gesellschaft in Südosteuropa aus sprach- und kulturhistorischer Sicht*, ed. Gerhard Neweklowsky (Vienna: ÖAW, 2007), 28–73.

[12] After the occupation of Bosnia and Herzegovina, this printing house changed its name to "K. und K. Hof-und Staatsdruckerei" and began printing the new government's herald, *Bosansko-hercegovačke novine*, in 1878.

[13] S. Mrkalj, *Salo debeloga jera libo azbukoprotres* (Budim, 1810); V. Stefanović Karadžić, *Srpska pismenica* (Vienna: Pečatnja Jovana Šnirera, 1814); V. Stefanović Karadžić, *Srpski rječnik* (Vienna: Štamparija jermenskog manastira, 1818); V. Stefanović Karadžić, *Prvi srpski bukvar* (Vienna: Slavjanoserbska knjižarnica, 1827).

[14] The campaign lasted from 29 July to 20 October 1878, spanning almost three months of armed conflicts, which left several thousand dead and tens of thousands of refugees in its wake.

Herzegovina, granting the Austro-Hungarian Empire only the right to "occupy and administer" the two provinces. In essence this meant that, although Bosnia and Herzegovina were under Austro-Hungarian occupation and administration, they remained Ottoman territories.[15]

In order to shield the inhabitants of the new territory from the cultural and political influence of other South Slavs in the Monarchy, Austria-Hungary took steps from the very beginning to establish a separate nation and language. In the context of the recently established political landscape, it was to be expected that the Serbian ethnic group in Bosnia and Herzegovina would source support from both Serbia and the Serbs in the Monarchy. From 1878 onwards, the unification of all Croats under the Austro-Hungarian Empire fostered a sense of shared identity and culture. Hence, any efforts by the Croats and Serbs from Bosnia and Herzegovina to unite were seen as a threat to the internal politics of the new provinces, as well as a growing problem with regard to the South Slavic question. Bosnian Muslims could barely count on the support of the Ottoman Empire. The Bosnian and Herzegovinian administration was aware of this, which is why, from the outset, it focused on obstructing relations between Bosnian Serbs and Croats and those in the Monarchy, particularly contacts between the Serbian population of Bosnia and Herzegovina and the Kingdom of Serbia. In its efforts to shape a new Slavic nation and a new South Slavic language, the administration found strengthening the economic and cultural position of the Bosnian Muslims to be the most effective approach. The Austro-Hungarian officer Joseph Philippovich von Philippsberg, who commanded the occupation troops in Bosnia and Herzegovina in the case of intervention, received instructions in 1875 that "religious issues should be given special consideration", with "a particular focus on cultivating the Catholic population and bringing the Muslim population closer to them".[16] Meanwhile, the Muslim population was to be kept separate from the Orthodox population, who was to be strictly supervised. These instructions were reflected in the press from 1878 onwards.

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[15] In addition, the Austro-Hungarians were granted permission to establish military outposts in the Sanjak of Novi Pazar, which continued to be a part of the Ottoman Empire and under its administration. In 1908, the garrisons were withdrawn from the region. Notwithstanding the implementation of certain amendments in the context of local political life, these did not affect the domains of education and language policy. Consequently, the Sanjak of Novi Pazar does not fall within the scope of this paper.

[16] R. Potz, "Das Islamgesetz 1912 und der religionsrechtlichere Diskurs in Österreich zu Beginn des 20. Jahrhunderts". In *Grundlagen der österreichischen Rechtskultur*, eds. T. Olechowsky, Ch. Neschwara, A. Lengauer (Vienna–Cologne–Weimar: Böhlau, 2010), 385–408; cf. G. Ilić Marković, *Roda Roda–Srpski dnevnik izveštača iz Prvog svetskog rata. Ratni presbiro Austrougarske monarhije* (Novi Sad–Belgrade: Prometej, 2017).

From previous experience with language policy regarding the nationalities of the Monarchy, the administrators knew from the outset that the name of the language, as well as the use of two or three scripts (Latin, Cyrillic and Arabic), could cause friction in the new provinces. The new administrators of Bosnia and Herzegovina attempted to counteract this with various measures. In concert with the education system, the press played a prominent role in achieving this aim. This intention is also evident from the census data, which used religion as a marker of identity. To establish a unified national identity, from the 1878 occupation onwards censuses were conducted solely based on religious affiliation, grouping the population into Mohammedan,[17] Greek-Oriental Christians,[18] Roman Catholic Christians, Israelites and "others", e.g., Evangelists and Greek Catholic Christians. Like in the rest of Austria-Hungary, nationality and language were not recorded in censuses. According to the first census conducted under Habsburg rule in 1879, the population was 1,158,164. In 1885, Bosnia and Herzegovina had 1,336,091 inhabitants and by 1895 it had grown to 1,568,092. In terms of numbers, the religious group changed insignificantly and in 1895 amounted to: 673,246 "Greek-Oriental Christians", 548,632 "Mohammedans", 334,142 "Roman Catholic Christians", 8,213 "Israelites" and 263 "others".[19] At the last census in the Monarchy in 1910, Bosnia and Herzegovina had 1,898,044 inhabitants, out of which: 825,338 Orthodox, 612,090 Muslims and 434,190 Catholics.[20] This religion-based differentiation was attributed solely to the understanding of identity held by the people of Bosnia and Herzegovina. In a publication by Hörnes from the Ethnographic–Anthropological Department of the Natural History Museum in Vienna, the local inhabitants are described as "not yet culturally advanced enough […] to feel like one nation on the basis of language".[21] Religion thus took the place of language and/or the nation. From the very beginning, the authorities commissioned scientific research on these topics, with writers and painters also tasked with similar as-

[17] In Austria-Hungary the German terms *Mohammedaner* and *Islamiten were used*, which was not appreciated by the Bosnian Muslims. In an article in the magazine *Behar*, an author advocated for naming the population of the Islamic religion as Muslims *(muslimani)* rather than Mohammedans *(muhamedanci)*, with the latter understood pejoratively. Cf. O. Nuri-Hadžić, *Muslimani, a ne muhamedanci! – Poslanik, a ne prorok i propheta!* (Sarajevo: Behar, 1900), 45–46.

[18] Meaning Serbian Orthodox. They also appeared in documents as Greek-Oriental, with the note "not united".

[19] *Bericht über die Verwaltung von Bosnien und der Herzegowina* (Vienna: K. und K. Gemeinsamen Finanzministerium, 1906), 6–8.

[20] *Bosna i Hercegovina u brojkama* (Mostar: Hrvatska dionička tiskarna, 1911), 2.

[21] M. Hörnes, *Bosnien und Hercegovina* (Vienna: Verlag von Karl Graefer, 1889), 106.

signments. With a few exceptions, these literary travelogues and paintings were created without their authors ever having been to Bosnia and Herzegovina. Experts from various disciplines travelled the country on behalf of the government or used data collected by others to describe the population, customs, landscape, state of infrastructure and raw material reserves of the region in their treatises. The numerous richly illustrated journals and literary travelogues produced and distributed in Austria-Hungary and other countries "serve... cultural narratives less for the representation of foreign people and places than for the self-understanding and self-assurance of the hegemonic culture, which is the starting point of the representation".[22]

Though initially only subject to Austria-Hungarian military governance, on 26 February 1879, Bosnia and Herzegovina was placed under the authority of the Ministry of Finance. Given the peculiarities of the dualist system, the territory of Bosnia and Herzegovina had been administered by the two halves of the Dual Monarchy through the Joint Finance Ministry. The Parliaments in Vienna and Budapest both reviewed the legislation, which ultimately required the emperor's approval. The Diet (*Landtag*) in Sarajevo was subordinate to these bodies.[23] In 1880, Austria-Hungary passed the Law of Governing Bosnia and Herzegovina, providing the legal framework for its administration of the region.[24]

Benjamin von Kállay was appointed the Minister of Finance of the Dual Monarchy in 1882, thereby becoming the administrator of the Condominium of Bosnia and Herzegovina. He remained in this role until his death in 1903. The Austro-Hungarian press reported extensively on "bringing modernity, civilisation and order to Bosnia". Another order was to create a tri-confessional nation, distinct from the other South Slavs. The postulation of a shared "Bosnian history" and a unified "Bosnian language" was crucial for this objective. In line with the publicly promoted image, numerous articles, scientific treatises, travel guides and exhibitions presented Bosnia and Herzegovina as a land of "exotic beauty" and "wonderful landscapes", full of interesting customs. The administrators of Austria-Hungary were praised for bringing culture (*Kulturbringer*) to the region. Kállay used historical references to Bogomil theory to emphasise "Bosnian

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[22] See: C. Ruthner, *Habsburgs 'Dark Continent' Postkoloniale Lektüren zur österreichischen Literatur und Kultur im langen 19. Jahrhundert* (Tübingen: Narr Francke Attempto, 2017), 257–312.

[23] Cf. F. Schmid, *Bosnien und die Herzegowina unter der Verwaltung Österreich-Ungarns* (Leipzig, 1914).

[24] *Reichsgesetzblatt*, 28 February 1880, no. 18.

uniqueness".[25] The introduction of conscription in 1881/82 also contributed to this. Following the introduction of compulsory military service, the "Bosnian-Herzegovinian Infantry"[26] was established. These troops, colloquially known as the "Bosniaks" (*Bosniaken*), were multiethnic. In 1910, the grey fez officially became part of the uniform as a way to convey a common national identity. This term would subsequently feature in the title of the gazette *Bošnjak* [The Bosniak] (1891–1910), which is a pertinent source for official national policy during that period.[27]

To foster a common national identity, Austria-Hungary introduced uniform names for institutions and documents, such as the "Land Museum" (*Zemaljski muzej/ Landesmuseum*) and the "Land Statute" (Zemaljski statut/ Landesstatut). This ultimately led to the creation of the glottonym "Land language" (*zemaljski jezik/ Landessprache*).[28] From the very beginning, the name of the language showed great potential for conflict, which did not subside until the Monarchy collapsed.

Public schools (four-year elementary schools) followed Austrian curricula and primarily used the Latin alphabet. Initially, non-commissioned officers worked as teachers until they were replaced by professional teachers with an Austrian license who came from other parts of the Monarchy. Alongside these schools, the number of denominational elementary schools also grew each year. In the 1904/05 school year, for example, there were 69 Serbian Orthodox, 32 Roman Catholic, one Protestant, and two Jewish elementary schools. The language of instruction was designated as the "Land language" The statement that the language of instruction in denominational and private schools is determined "according to the nationality of the school's administrators"[29] primarily applied

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[25] N. Clayer, "Der Balkan, Europa und der Islam" in: Europa und die Grenzen im Kopf". In *Enzyklopädie des europäischen Ostens*, eds. K. Kaser, D. Grashammer-Hohl, R. Pichler (Klagenfurt: Weiser, 2003), 303–328.

[26] Until the enactment of the Bosnian-Herzegovinian Defence Law in 1912, they were not a part of the common Austro-Hungarian military force.

[27] See also T. Kraljačić, *Kalajev režim u Bosni i Hercegovini (1882–1903)* (Sarajevo: Veselin Masleša, 1987), 224–227.

[28] Today, this idiom is mostly taken to mean "national" in Bosnia and Herzegovina., e.g. *Zemaljski muzej* (National Museum). Considering that the word "land" refers to territory rather than nation, which is important in this historical context, the language name given by the Austro-Hungarian government is translated as "Land language" in this paper – according to the original German (*Land-*) and the original term used in Bosnia (*zemaljski*) sometimes given in brackets. Here, the term "Land" refers to an administrative territory, not a state.

[29] *Bericht über die Verwaltung von Bosnien und der Herzegowina* (Vienna: K. und k. gemeinsamen Finanzministerium, 1906), 153–229.

to Hungarian, German, and Italian schools, but also indicated the possibility of using other language names in this type of school, which is also documented in separate annual school reports (*Školski vjesnik: Stručni list Zemaljske vlade za Bosnu i Hercegovinu* [School Herald: Professional Journal of the Provincial Government for Bosnia and Herzegovina]). Schoolbooks were standardised and they represented either translations of Austrian textbooks in German or the books that were already in use in the schools of Dalmatia, Slavonia, or Vojvodina. They were issued in Cyrillic for the "Serbian Orthodox denominational schools" and in Latin for all other elementary schools in Bosnia and Herzegovina. In the abovementioned regulation, it was noted that the language of instruction shall be the "local" or "Bosnian" language, using the Latin and Cyrillic scripts. The textbooks were ordered from Vienna, while books for language instruction and learning were directly received from Zagreb.[30] This affected the vocabulary of the written language, especially administrative language, and aroused resentment among the local population, particularly intellectuals. Only public schools, however, were required to use these textbooks exclusively. Denominational and private schools were run by religious communities or private persons. Alternative textbooks were permitted in those schools, provided they first underwent a review process by the administration prior to being authorised for use in schools. Upon the introduction of compulsory elementary education in Bosnia and Herzegovina in 1912, the educational infrastructure included 331 public schools, 116 Orthodox schools, 28 Catholic schools, two Protestant schools, and ten private schools. A mere 26.7% of school-age children were enrolled in elementary school, excluding Muslim girls from the statistics.[31]

From 1885 onwards, several commercial schools were established that taught German and, in some cases, French or Italian alongside the "Land language". The Imperial and Royal Military Boys' Boarding School was founded in Sarajevo in 1879. German was the language of instruction, with the "Land language" as part of the curriculum, although it was taught for fewer hours than subjects such as French or geography.[32] Higher girls' schools existed only under Roman Catholic and Serbian Orthodox private sponsors. One report refers to the "Catholic Higher Girls' School with Bosnian as the Language of Instruction". The term "Land language" was also used in state-run teacher-training colleges, as well as in the few higher secondary schools (*Obergymnasien*) and secondary

[30] Ordinance of the State Government in Sarajevo of 10 May 1880, concerning the establishment of primary schools at which K.K. sergeants taught, "Verordnung der Landesregierung in Sarajevo von 10. Mai 1880, Nr. 9228".

[31] M. Papić, *Školstvo u Bosni i Hercegovini za vrijeme okupacije (1878–1918)* (Sarajevo: Biblioteka kulturno nasljeđe, 1971), 51.

[32] M. Papić, *Školstvo u Bosni i Hercegovini za vrijeme okupacije (1878–1918)*, 187.

schools (*Realschulen*). Like in censuses, students were grouped by religious denomination in all statistics..

Throughout history, the political, educational, ideological, financial and, from time to time, linguistic and didactic justifications for requests to implement changes in the naming of the language(s) changed. The government addressed the language issue on multiple occasions and for a variety of reasons, including in the domains of administration, education and the military. The term "land" (*Land, zemaljski*) was used in official documents and for the names of institutions: Museum, Statute etc. However, due to the absence of a grammar or dictionary for the so-called "Land language", it couldn't be regarded as a standard language. Although this act is significant for research in glottonymy, it had no bearing on the existence of a language standard. Political institutions are principally responsible for establishing and designating a written language for communication in the public domain, such as in teaching, official documents and the media. This depended on the dominant political aspirations of the respective period. Language undoubtedly has an integrative function too, marking out a group's identity. This can lead to the unification of several vernaculars into one written language and the forming of a new nation, or to the emergence of new national languages through language segregation. The vernacular, in all its varieties, and the literature that has developed within it (oral or written), remains unaffected by this process. Therefore, it is unsurprising that dictionaries and grammars with different names and standards are published simultaneously within one language area. As the American linguist Kenneth E. Naylor once put it, language becomes a flag.[33]

The term "Land Language" was consistently used in government reports until 1907, when it was replaced by Serbo-Croatian. Except in the informal vernacular, the term "Bosnian language" appeared in some publications and the press and, occasionally, in documents issued domestically, for example, in internal school documents, but never in official Austro-Hungarian documents. For instance, the name "Bosnian" was used to refer to the language in the title of one school grammar book, which was published anonymously even though the author was well known. Several studies have attempted to determine whether the author of this grammar, a language teacher from Croatia called Franjo Vuletić, declined to sign a government-prescribed book or whether this was the decision of the state publisher.[34] His "Grammar of the Bosnian Language for Middle

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[33] K. E. Nejlor, *Sociolingvistički problemi među južnim Slovenima* (Belgrade: Prosveta, 1996), 11–37.

[34] M. Okuka, "Gramatike srpskohrvatskog književnog jezika u Bosni i Hercegovini od Vuka Karadžića do kraja austrougarske vladavine". In *Književni jezik u Bosni i Hercegovini od Vuka Karadžića do kraja austrougarske vladavine* (München: Slavica-Verl. Kovač,

Schools" was published in the Cyrillic and Latin scripts in 1890.[35] The phonemic orthography, which was already used for Cyrillic printing by the Sopron printing house, remained in use for the "Serbian Primer"[36] and newspapers, reflecting the orthographic reform of the Serbian language implemented in the early 19th century. The phonemic orthography was also partially adopted in the 1830s by the representatives of the Croatian national revival movement (the so-called "Illyrian movement") in the Latin script (the so-called *gajica*). *The language question appeared to be approaching a resolution through solutions that had already been implemented in other regions of Austria-*Hungary. The problem was finding a suitable glottonym. In summary, proposals for the name of the language bounced between toponym-based (Land language, Common Land language or Land language of Bosnia), preferred by the administration, and ethnic-based names (Serbian and Croatian), preferred by the Croats and Serbs, reflecting the existing normative linguistic frameworks for these two languages.

In the Provisional Regulation enacted during the initial year of occupation (1879),[37] Serbo-Croatian, using the Latin script, was designated the "official written language within Bosnia and Herzegovina", while German was named the official language from the district administration level upwards. From the outset, the implementation of this regulation was modified in practice, resulting in new legislation. The decree on the designation of the language and script was issued by the Joint Ministry on 12 September, establishing "the Land language with the Latin script … removing the word 'Croatian'", which had been used sporadically and unofficially in the first months of the occupation.[38] Subsequently, the decree on education passed on 26 August 1879 declared that two one-year courses were to be instituted in Sarajevo from 1 October 1879 "for children of all denominations, if possible", with the objective of imparting instruction in the Land language in the Latin alphabet "with the intention of preparing students

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1991), 140–145; Dž. Juzbašić, *Jezičko pitanje u Austrougarskoj politici* (Sarajevo: Svjetlost, 1973); E. Kevro, "Naučni stavovi i njihova interpretacija o Gramatici bosanskog jezika iz 1890. u odnosu na (do sada poznatu) arhivsku građu", *Književni jezik* 27 (2016), 57–92.

[35] *Gramatika bosanskog jezika za srednje škole, Nakladom zemaljske vlade za Bosnu i Hercegovinu* (Sarajevo: Štampa zemaljske štamparije, 1890).

[36] *Bukvar za osnovne škole. U vilajetu bosanskom* (Sarajevo: Vilajetska štamparija, 1867).

[37] "Provisorische Geschäftsordnung für die Behörden in Bosnien und der Herzegowina vom 16. Februar 1879, Allgemeine Bestimmungen §§, Landesgesetzblatt Bosnien und die Herzegowina 1878–1918, 26 (1879), 26–29.

https://alex.onb.ac.at/cgi-content/alex?aid=lbh&datum=1878&page=38&size=45

[38] "Erlass des Gemeinsamen Ministeriums, Nr. 4479". *Landesgesetzblatt Bosnien und die Herzegowina 1878–1918*, 26 (1879), 317.

for subsequent enrolment in secondary education".[39] In another regulation enacted on the same day, "the Land language of Bosnia" with the Latin script is listed as the language of instruction in secondary schools.[40]

From 1880 onwards, the regulation on the designation of the language as "Land language" (*Landessprache*) was supplemented with the use of two scripts.

> I have ordered that it be expressly stated that the language of education would be the Land language in Latin and Cyrillic letters, so that the Serbs would have no excuse to complain about supposed discrimination. (Excerpt from a report of the provincial government in Sarajevo dated 27 November 1879, No. 26491, concerning instruction using Cyrillic letters). [...] Regarding the Latin script specifically, the population should be informed that it is being taught in order to offer schoolchildren the opportunity to understand the official language and the official writing of the authorities here. [...] The political authorities should therefore not fail to educate the population of these countries in this sense and emphasise at every opportunity that, adhering to the basic law of equality, they strive to cultivate national and religious distinctiveness..." According to the regulation of the provincial government in Sarajevo dated 23 September 1880, No. 21339, the language of instruction in the municipal elementary schools is the Land language [Landessprache][41] – reading and writing the Latin and Cyrillic scripts, German is a compulsory subject, and the subjects of geography, history and natural sciences are to be taught "based on the prescribed readers.[42]

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[39] "Verordnung der Landesregierung in Sarajevo, Nr. 16887, §§ 1, 3". *Landesgesetzblatt Bosnien und die Herzegowina 1878–1918*, 26 (1879), 314.

[40] "Verordnung der Landesregierung in Sarajevo, Nr. 17012, § 2". *Landesgesetzblatt Bosnien und die Herzegowina 1878–1918*, 26 (1879), 315.

[41] The term "Land language of Bosnia" (*Bosnische Landessprache*) is used interchangeably in the same document for the year 1880.

[42] "Ich habe die Anordnung getroffen, dass es ausdrücklich ausgesprochen wurde, die Unterrichtssprache sei die Landessprache in lateinischen und cyrillischen Lettern, damit den Serben kein Vorwand bliebe, sich über vermeintliche Zurücksetzung zu beklagen", "Auszug aus einem Berichte der Landesregierung in Sarajevo vom 27. November 1879, Nr. 26491, betreffend den Unterricht mit Gebrauch der cyrillischen Lettern", *Landesgesetzblatt Bosnien und die Herzegowina 1878–1918*, *Gesetze*, vol. 1 (1878–80), 319. "[...] Was speziell die Lateinschrift betrifft, so wolle die Bevölkerung belehrt werden, dass dieselbe [...] [deshalb] gelehrt wird, um der Schuljugend die Möglichkeit zu bieten, die Amtssprache und die Amtsshrift der hierländlichen Behörden zu verstehen [...] Die politischen Behörden sollen also nicht unterlassen, die Bevölkerung dieser Länder in diesem Sinne zu belehren, und bei jeder Gelegenheit zu betonen, dass man, an dem Grundgesetze der Gleichberechtigung festhaltend, dahin strebe, die nationalen und religiösen Eigentümlichkeit zu kultivieren...", "Verordnung der Landesregierung in Sarajevo vom 23. September 80, Nr. 21339..." ist die Unterrichtssprache an den städtischen Volksschulen die Landessprache (Lesen und Schreiben der lateinischen und cyrillischen Schrift). Deutsch ist ein Pflichtgegenstand und die Fächer Geographie, Geschichte und Naturkunde sind "auf Grund der vorgeschriebenen Lesebüchern zu lehren". *Landesgesetzblatt Bosnien und die Herzegowina 1878–1918. Gesetze*, vol. 1 (1878–80), 319–336.

From then on, official gazettes such as *Sarajevski list* (1881–1918) were printed in the Latin or Cyrillic script (and from 1916, only in the Latin script). Announcements were also published in both scripts. The linguistic expression varied slightly to reflect Serbian or Croatian, but it was increasingly perceived as one language. The situation was somewhat different with the literary language, which reflected not only a person's dialect and region, but also the specific vocabulary of a social group, as well as various sentence structures and morphological features. Religious affiliation could also influence the stylistics of individual users.

The term "Land language" prevailed in government documents, the official press and public education, with the use of both the Latin and Cyrillic alphabets. Croatian and Serbian continued to be used as labels for the language within their respective communities. Over time, the Muslim community increasingly adopted the term "Bosnian".

In addition to the Dual Monarchy's identity policy, Mehmed-beg Kapetanović Ljubušak, the founder and editor of the newspaper *Bošnjak*, sought to unite all ethnic and religious groups in Bosnia under the name Bosniak (Bošnjak). The introduction of the Latin alphabet among the Muslim population can be attributed to this newspaper (1891–1910 in Sarajevo) and books on the life and culture of Bosnian Muslims published by Ljubušak in the Latin script. At the same time, publications in the Arabic and, even more so, Cyrillic scripts declined among the Muslim population.[43] This was in line with the administration's language policy and was supported and financially assisted by the state. The same Sarajevo-based printing house, "The Islamic Joint Stock Printing House" (*Islamska dionička štamparija*), printed the entertainment and educational newspaper *Behar* in the Latin script from 1900 to 1910. From then on, the Herald of the Muslim Community, *Gajret*, was also printed there in the Latin script. The first Muslim publisher, Mostar-based Muhamedi-Bakir Kalajdžić, published a Latin-script magazine called *Biser* [The Pearl], which, according to its subtitle, aimed to spread education among Bosnia and Herzegovina's Muslims. The name of the Muslim Community Organization's organ, "Musavat" (1906–1911), was rendered in three scripts – Latin, Cyrillic and Arabic – while the articles were printed in the Latin script. The proclamation of a unified nation, named after the territory, was not widely accepted by Serbs and Croats in

[43] *Sarajavski cvjetnik* (Gülşen-i Saray) [The Sarajevo Flower Garden], one of the first weekly newspapers with political and literary content, was printed at the Vilajet printing house (Sopron printing house) from 1868 to 1872. The newspaper, published in the Cyrillic (Serbian language) and Arabic (Ottoman Turkish language) scripts, was discontinued before the occupation.

Bosnia and Herzegovina. Shortly afterwards, the term "Bosniak" began to be used as the national identifier of the Bosnian Muslims.

However, the heterogeneous population of the Ottoman Empire, which was divided along religious lines, remained in place despite Austria-Hungary's efforts to establish a new unified nation and language for both occupied provinces. These efforts included introducing neutral names for institutions and language, derived from territorial rather than national markers, for both occupied provinces. An exception was the domain of cultural and educational institutions, which were subject to segregation by denomination and financed by the respective religious communities or individual benefactors.

The three cultural associations—Croatian "Napredak", Serbian "Prosvjeta" and Muslim "Gajret"—played a crucial role in culture and education, as well as in the political affairs of their respective communities. These associations and their publishing output, although modest, also contributed to the strengthening of the national identity of Croats, Serbs and Muslims. All these societies were originally founded to collect and award scholarships to pupils and students from their national or religious communities. In addition, each community disseminated its newspapers and magazines. These factors had a profound impact on the political landscape, language policy and the entire cultural environment of the region. The publications provided a wide range of content, including contributions on entertainment, religion, literature, science and education.

Croatian newspapers and magazines were published in the Latin script, with their language termed "Croatian", while their Serbian counterparts used the Cyrillic script and the term "Serbian". A certain degree of differentiation can be found in the newspapers and magazines of the Muslim community, whose publishing output mostly used the Latin script, with occasional articles also appearing in the Cyrillic and Arabic (Arebica) scripts in the early days. Newspapers did not openly state which language they used or what it was called. The following examples illustrate the significance of these publications. Information about this is provided both in the subtitles of these print media and in the announcements in the first issues. These newspapers published current news and were also important for the publication of both old and new literature. However, they also provided a platform for discussions that highlighted the divisions within the communities. These community heralds did not follow the official line proclaimed as "politically correct" by state-funded newspapers and magazines, and their texts were censored. The language issue was not a rare topic, and it was often discussed.

The most important Croatian newspaper in Bosnia and Herzegovina, *Hrvatski dnevnik*[44] [Croatian Daily], opined on the negative comments made by the Serbian community about public schools:

> On public schools: The Bosnian-Herzegovinian education system initially faced significant hurdles, which hindered its progress and led to a notable decline in the participation of Muslim students. Our Orthodox compatriots disseminated astonishing information regarding Bosnian-Herzegovinian schools. It was rumoured in the bazaars and written in Serbian newspapers that the Bosnian-Herzegovinian administration had initially sought to utilise schools for turning Muslims away from their religion.[45]

The leading Serbian magazine for literature, culture and social issues, *Bosanska vila* [Bosnian Fairy] (1885–1914), criticised the use of incorrect grammar in *Školski vjesnik* [School Newsletter], the official annual school report:

> We like that the report is in both Cyrillic and Latin, but we are sorry that it is rife with grammatical errors. We found all these errors in the text written by a Herzegovina-born teacher. This goes to show how much influence the school has on the erosion of the native language, so it is no surprise that so many students fail because they do not understand what is being taught to them.[46]

Bošnjak, the most prominent newspaper of the Muslim population, featured a debate on the use of the Cyrillic alphabet: "We have never used the Cyrillic alphabet, and we never will. If you don't like it, you can leave. We have our Muslim brothers and the honourable Catholic Croats".[47]

Reports in the Viennese, Zagreb and Belgrade press on issues such as the language question in Bosnia and Herzegovina frequently referred to the lively discussions on this topic in the newspapers of Bosnia and Herzegovina.

State censorship did not only affect articles in non-government publications. It began with the names of books, such as the abovementioned "Bosnian Grammar Book", and magazines. *Franjevački glasnik* [Franciscan Herald], printed in the town of Visoko, was an educational and religious herald, as stated

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[44] The subtitle was: *Za interese bosansko-hercegovačkih Hrvata* [For the Interests of Bosnian-Herzegovinian Croats]. This newspaper, which mainly covered political topics, was published in Sarajevo irregularly from 1906 to 1918.

[45] "O narodnim školama: Na to bosansko–hercegovačko školstvo navalila se u početku Velika mora, koja ga je sprečavala u razvoju i koja je poglavito muslimane odbijala od škole. O bosansko-hercegovačkim školama naši su pravoslavni zemljaci …širili najnevjerovatnije vijesti…tu se je javno po čaršijama govorilo i po srpskim novinama pisalo, kako bosansko–hercegovačka uprava hoće posredstvom škola da razvjeri u prvom redu muslimane", *Hrvatski dnevnik*, Sarajevo, 28 May 1908, 2. Digital collection NUBBiH. https://kolekcije.nub.ba/items/show/452

[46] *Bosanska vila*, Sarajevo, 15 December 1902, XVII/25, 432.

[47] *Bošnjak*, Sarajevo, 28 May 1910, 4.

in its subtitles. The first issue was published in 1887 under the name *Franjevački jugoslovenski glasnik* [Franciscan Yugoslav Herald] due to the editors' intention to address all Croatian-speaking Franciscans residing in Austria-Hungary. On government orders, the name had to be immediately changed to *Franjevački bosansko-hercegovački glasnik* [Franciscan Bosnian-Herzegovinian Herald]. From 1895 to 1901, this newspaper was published as *Franjevački glasnik*; between 1902–1913, afterwords as *Serafski perivoj* [Seraphic Garden], before it was renamed *Naša misao* [Our Thought] in 1914–1919. School names were another matter that elicited government interference. The authorities stated "no objection to Greek-Oriental religious communities being allowed to name their denominational elementary schools 'Serbian elementary schools' (Srbsko narodno učilište), ... The combination ... 'Serbian – true believer' [Orthodox] should, however, be avoided, because it simultaneously denotes Serbian nationality".[48]

As decreed, the government and pro-government print media published in Sarajevo were in the "Land language", in the Latin or in Latin and Cyrillic script. Censorship was unnecessary. The following publications were the most prominent: *Bosansko-hercegovačke novine* [Bosnian-Herzegovinian Newspaper] (1878–1881) in the Latin script, with some items in German; followed by *Sarajevski list* [Sarajevo Newspaper] (1881–1914) in the Latin and Cyrillic scripts, with some items in German; *Bosanska pošta* [Bosnian Post] (1896–1898, Latin script); *Bošnjak* (1891–1910, Latin script). The formation of a unified nation and language in Bosnia and Herzegovina was even promoted in the periodical *Glasnik Zemaljskog Muzeja Bosne i Hercegovine* [Gazette of the National Museum of Bosnia and Herzegovina], the official organ of the Land Museum, founded in 1888. This periodical was published in Sarajevo four times a year. Selected contributions were published annually in the German language in Vienna. The Land Museum was a multifunctional institution that included a library, a museum of art history, history, ethnology and archaeology, and a publishing house. The name of the language in which the journal would be published was not mentioned in the first issue. However, a reference was made to the script:

> It must be emphasised that material constraints make it impossible to publish *Glasnik* as two separate editions in the Latin and Cyrillic scripts. We are making

[48] "Demnach unterliegt es keinem Anstande den griechisch-orientalischen Cultusgemeinden zu gestatten, dass sie ihre confessionellen Volksschulen 'serbische Volksschulen' (Srbsko narodno učilište) nennen … Die Verbindung 'serbisch – echtgläubig' [orthodox] wäre jedoch zu vermeiden, weil dadurch gerade die serbische Nationalität zugleich bezeichnet wird", "Erlass des gemeinsamen Ministeriums vom 11. Oktober 1880, Nr. 6687 B. H., betreffend die Bezeichnung der serbischen Volksschulen", *Landesgesetzblatt Bosnien und die Herzegowina 1878–1918*, 345.
https://alex.onb.ac.at/cgi-content/alex?aid=lbh&datum=1878&page=359&size=45.

> every effort to preserve the integrity of both our scripts and to ensure that the publication remains inclusive in its presentation.[49]

Constantin Hörmann, the Land Museum's long-serving director, founded and edited the luxury literary and art magazine *Nada* [Hope] from 1895 to 1903. This magazine was created as a counterpart to *Bosanska vila*, the only literary magazine in Bosnia and Herzegovina at the time, published in the Cyrillic script and the Serbian language. The intention behind this initiative was to create a space that would bring together writers and artists from a range of religious affiliations. *Nada* was printed in both the Latin and Cyrillic scripts, with literary contributions retaining the linguistic features of their respective authors.

In 1907, Kalláy's successor, Burián von Rajecz (Joint Finance Minister in Vienna, 1903–1912), issued a decree that abolished "referring to the language of these lands as Bosnian" and advocated for the designation "Serbo-Croatian", with the continued use of the name "Land language", if required, which in turn led to new conflicts.[50] Rajecz's decree did not speak about the existence or standard of a language, limiting itself to the name. Rajecz sought to prepare Bosnia and Herzegovina for annexation. One option he may have considered was incorporating the country into the Monarchy's structure by naming its language Serbo-Croatian, a term that was already in use. The idea of a South Slavic ethnic and linguistic community within the Austro-Hungarian Empire became increasingly prevalent in the 19th century, especially in its second half, due to the Empire's linguistic and education policies, which were promoted for economic, administrative and political reasons. The establishment of the Yugoslav Academy of Sciences and Arts (JAZU) in Zagreb in 1866 provided an institutional framework for developing a unified language. In 1880, the JAZU began work on a joint Croatian-Serbian dictionary. The term "Serbo-Croatian" or "Serbian-Croatian" or "Croatian-Serbian" became established for official purposes in the Austrian part of the Monarchy. Parallel to this term, the glottonyms "Croatian"[51]

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[49] *Glasnik zemaljskog muzeja u Bosni i Hercegovini*, Sarajevo, 1889/1, 5.

[50] ABH Landesregierung für Bosnien und Herzegowina, no. 168539, 4. 10. 1907, quoted in Dž. Juzbašić, *Jezičko pitanje u Austrougarskoj politici* (Sarajevo: Svjetlost, 1973), 10.

[51] A. Veber, *Slovnica hervatska za srednja učilišta* (Zagreb, 1873); M. Divković, *Hrvatska gramatika* (Zagreb: Tiskom dioničke tiskare, 1879); I. Broz, *Hrvatski pravopis* (Zagreb, 1892); D. Parčić, *Rječnik hrvatsko-talijanski* (Zadar: Tisak i naklada Narodnog lista, 1907) [named "Illyrisch-Italienisches Wörterbuch" in the first edition of 1858]. The same year (1895) saw the publication of two editions of the same language textbooks in Vienna by the same printing house (A. Hartlebens's Verlag) and author (Emil Muža), one for Serbo-Croatian and one for Croatian: "Die Kunst, die Serbokroatische Sprache durch Selbstunterricht schnell zu erlernen" and "Praktische Grammatik der Kroatischen Sprache für den Selbstunterricht: Theoretisch-praktische Anleitung zur schnellen Erlernung durch Selbstunterricht".

and "Serbian"[52] also existed. The term "Serbo-Croatian" was in use at the University of Vienna, in the school system and the press (as evidenced by, among other things, study reports from the University of Vienna archives, school protocols, census data, press articles, etc.). The first grammars, dictionaries and textbooks that employ the double-barrelled designation in their titles or introductions date from this period: "Serbsko-Hervatski" or "Hervatsko-Serbski" or "Serbo-Croatian". In this period, the double-barrelled name and the perception of Serbian and Croatian as one language became established in academic linguistic treatises and periodicals in Austria-Hungary, as well as in Germany, Great Britain and France.

As a result, the abovementioned "Grammar of the Bosnian language for Secondary Schools" in the Latin and Cyrillic scripts, edited in Sarajevo in 1890, was renamed in 1908 to the "Grammar of the Serbo-Croatian Language".[53] Despite this, consistent implementation was not achieved. For example, the curriculum prescribed in 1908 for the establishment of commercial schools in Bosnia and Herzegovina used the term "language of instruction".[54] Notably, the 1910 Land Statute (*Landesstatut/ Zemaljski statut*) for Bosnia and Herzegovina did not address the name and use of the language.[55] The language question constantly interfered with social and religious issues and became a political affair.

Attempts to create a new nation and language failed. The language issue in Bosnia and Herzegovina thus became part of the South Slav question in the

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[52] After two uprisings, Serbia gained autonomy within the Ottoman Empire in 1830. The borders of the Principality of Serbia were confirmed in 1833. Among other things, this led to a rapid expansion of elementary, secondary and higher education and publishing in the Serbian language, influencing further developments in language issues within Austria–Hungary. The glottonym "Serbian" is rarely found in state-sponsored books and institutions in the Austrian part of the Empire, but it was commonly used in self-funded schools and independently published books throughout the Dual Monarchy. This state of affairs intensified when Serbia gained full independence in 1878 and became a kingdom in 1882.

[53] This problem has continued to plague the region, with occasional hiatuses. Due to its complexity and the influence of various social and political factors, the development of a solution that would satisfy all parties involved has proven elusive.

[54] "Verordnung der Landesregierung für Bosnien und Herzegowina vom 20. Oktober 1908, Z. 173.928/., § 3".

[55] "Allen Landesangehörigen ist die Wahrung der nationalen Eigenart und Sprache gewährleistet" [All citizens are guaranteed the preservation of their national identity and language], "Allerhöchste Entschließung vom 17. Februar 1910. Landesstatut für Bosnien und Herzegowina, 23, § 11", *Gesetz- und Verordnungsblatt für Bosnien und die Hercegovina*, 19/22 February 1910, available at: https://fcjp.ba/wp-content/uploads/2010/10/Landesstatut.pdf.

Empire. In the final decades of the Dual Monarchy, the language issue became a plaything of national conflicts of interest as well as a matter of religious belief, with the determination of the language of instruction serving as a symbolic definition of a community's national identity. The connections with the other South Slavs in the Monarchy were getting stronger, which led to government sanctions.[56] The growing working class and part of the educated class were increasingly interested in the idea of a unified South Slav identity. In 1910, 87% of the inhabitants of Bosnia and Herzegovina were still illiterate – a significant figure in the context of the language question, which was, in fact, more of a national and social one. This period saw several assassination attempts against the Monarchy's officials and dignitaries[57] and the increased frequency of revolts among the working class. The economic and educational reforms were implemented in a selective and piecemeal manner. This demonstrated the increasing urgency of finding a solution to the South Slavic issue within the Dual Monarchy.

Because of strict censorship in Bosnia and Herzegovina, alternative perspectives and critical voices were packaged in satirical texts or published beyond its borders, including in other parts of the Monarchy, where censorship was not as strict.[58] In Vienna, Kraus, an Austrian writer, criticised the Austrian policy in Bosnia:

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[56] On 3 May 1913, a decree was issued dissolving all "social democratic sports, singing and music associations", and "all Serbian national organisations", "Verordnung der Landesregierung für Bosnien und Herzegowina vom 2. Mai 1913, Z. 2520, § 14".

[57] In 1910, Bogdan Žerajić, a Serbian student from Herzegovina, shot Marijan Varešanin, the governor of Bosnia and Herzegovina, in Sarajevo. Žerajić was shot dead on the spot. He became a national hero among South Slavic youth. During the so-called inflation protests, the Dalmatian deputy Njeguš from Montenegro fired shots in the Vienna Parliament in 1911. In 1912, Croatian student Luka Jukić targeted Slavko Cuvaj, Ban of Croatia, in Zagreb. The Jukić trial gave rise to South Slavic demonstrations and slogans such as "Long live the unity of Slovenes, Croats and Serbs!". He and his accomplices became national heroes among the South Slavs. In the same year, another assassination attempt was made on the same ban, who subsequently withdrew from political life. In 1913, Stjepan Dojčić assassinated the new administrator of Croatia, Ivan Škrlec. All these assassination attempts were motivated by the pursuit of social justice and the South Slavic question. Gavrilo Princip and his accomplices (Serbs, Croats and Muslims), who later killed Archduke Franz Ferdinand, also identified as "Yugoslavs" at their trial, rather than as Serbs, Croats or Muslims.

[58] S. Vervaet, "Bosanska vila i Dvojna monarhija: Književni program bosanskohercegovačkih Srba i kulturna politika Austrougarske". In *Susret kultura: zbornik radova* (Novi Sad: Filozofski fakultet, 2006), 659–669; M. Rizvić, *Književno stvaranje muslimanskih pisaca u Bosni i Hercegovini u doba austrougarske vlade* (Sarajevo: Akademija nauka i umjetnosti BiH, 1973).

> It is necessary to show the true picture, as we always hear only enthusiastic praise from Bosnian visitors. [...] It should also be mentioned that in Bosnia, too, the Austrian strategy of playing one nation off against another was applied, and there were even ambitions to create a third nation. The confusion is getting worse and worse.[59]

Governor Kállay found himself on the receiving end of critical comments in the United Kingdom. *The Spectator*, a London-based weekly, quoted statements Kállay had made in an interview published in another London-based outlet, the *Daily Chronicle* from 3 October 1895, subjecting them to a more detailed analysis. For demonstration purposes, here are some of Kállay's statements about Bosnia:

> What we have tried to do is to build the new upon the old. In many respects the old Turkish law was admirable in principle, but utterly evaded in practice. We follow this wherever possible, and the content of the whole people, with the most insignificant exceptions, proves how right we are. […] Austria is a great Occidental Empire, charged with the mission of carrying civilisation to Oriental peoples, – of one of which I myself am a member. Austria-Hungary stands midway between West and East, and it is translating the one for the other. It was the ambition of Austria to make of Bosnia-Herzegovina the highest civilisation of the Balkan Peninsula.[60]

The Czech writer and journalist Josef Holeček published an article in the Kingdom of Serbia:

> The government has decided to replace the word 'Serbian' with 'Bosnian'. But, for goodness' sake, what will happen to the Bosnian language in Herzegovina? Logically, it would have to be ordered that the 'Herzegovinian' language be used instead of 'Serbian', and in the Novi Pazar Sanjak, it would have to be called the 'Novi Pazar' language. If Mr Kallay's heartfelt wish were to be fulfilled and Dalmatia were to fall under his administration, he would have to introduce the 'Dalmatian' language by the force of his official power. This language has never existed, just as Bosnian or Herzegovinian.[61]

In 1904, Petar Kočić[62] published his satirical drama *Jazavac pred sudom* [The Badger on Trial] in Zagreb, Croatia. The "cultural mission" in Bosnia and

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[59] "Es tut … Noth, das wahre Bild zu zeigen, als wir von den bosnischen Ausflüglern stets nur die begeisterten Lobpreisungen zu hören bekommen. … Es sei nur noch erwähnt, Dass man auch in Bosnien das österreichische Prinzip der Ausspielung einer Nation gegen die andere in Anwendung brachte und sogar eine dritte schaffen wollte. Die Verwirrung wird immer ärger". In K. Kraus, "Kallays Cultursendung", *Die Fackel* 22 (1889), 7–9.

[60] "Baron de Kallay's Achievement", *The Spectator*, London, 5 October 1895, 8–9.

[61] J. Holeček, "Dvadesetogodišnja okupacija Bosne i Hercegovine", *Delo*, Belgrade, 1889, 444.

[62] Petar Kočić (1877–1916) was a Serbian writer from Bosnia and Herzegovina and one of the most prominent representatives of an anti-Austrian resistance in Bosnian

Herzegovina, which the Dual Monarchy had consistently emphasised as its goal after the occupation, had little effect even after over 30 years. Political tensions in the annexed territories increased rather than decreased. Peasant revolts, strikes, dissent in the press and literature, and even assassinations were not uncommon. Kočić's satirical drama describes an old farmer who has lost a large part of his harvest due to the Austro-Hungarian tax, and who accuses the badger, which has devastated his harvest, at the district court – a metaphor for the suffering of the inhabitants of Bosnia.

Later on, some satirical and critical texts appeared in publications in Bosnia, including two literary works by Kočić. His satirical story *Jablan* [The Poplar], which he wrote as a student in Vienna, describes a fight between two bulls in Bosnia: one Bosnian and one Austrian. It was published in 1903 in Sarajevo.[63] The satire was further reinforced when it appeared in Alexander Roda Roda's German translation in the 1903 issue of a Vienna agricultural journal[64] dedicated to bulls.[65]

Just like during the 18th and 19th centuries, when the Serbian-Croatian language in Hungary and Austria was under the lexical influence of Hungarian, German, Latin, etc., the language in Bosnia was subjected to the same process after the occupation, with expressions and phrases used by the Croats and Serbs from the Habsburg Monarchy joining in on this process. Petar Kočić describes the language situation in Bosnia in 1911:

> After 33 years of Austrian domination, our language is so ruined that it's safe to say that today among the intelligentsia in Bosnia and Herzegovina, in the mother countries of our literary language, the dirtiest and most irregular language is written and spoken [...] The influence of the new administration and its institutions on our language is harmful. [...] This is a disgusting Serbo-Croatian malformation, that is inert, screwed, often quite incomprehensible [...] In addition to the courts and other public institutions, as well as newspapers and journalists, [...] our schools [...] have

cultural life. The journalist and satirist Savo Škarić, who died at a young age in 1909, also deserves a mention here. Like Kočić's works, his column in the Sarajevo newspaper *Srpska riječ* [The Serbian Word], which appeared under the title "Zembilj" from 1906 to 1909, was a strong critical voice in Bosnia. Škarić also addressed issues relating to language and school education.

63 *Bosanska vila*, Sarajevo, 30 March 1902/VII, no. 6, 104–106.

64 P. Kočić, "Jablan. Petar Kotschitsch, Authorisierte Übersetzung aus dem Serbischen von Roda Roda", *Die Wiener Landwirtschaftliche Zeitung*, Vienna 19 December 1903, 1–2.

65 G. Ilić Marković, "Die Taschen voller Papier". In *P. Kočić: Jablan*, ed. G. Ilić Marković, N. Vukolić (Banja Luka–Belgrade: Zadužbina "Petar Kočić", 2007).

> also tirelessly and systematically worked, and continue to work, to corrupt and heartlessly torture our language.[66]

This confusing situation in the mother tongue was triggered by the politically motivated failure to introduce language standards that had existed since the 19th century, as well as by changing the name of the language. Additionally, the use of the German language by the local population was awkward and riddled with incorrect phrases. This affected all those who wanted to participate in political, economic and cultural life, and led to an uncertain and inferior attitude towards language. It is worth recalling the term "schizoglossia", introduced in 1962 by the American linguist Haugen. Based on the standardisation of Norwegian, his native language, and also his and other US immigrants' uncertainties in using the American and British varieties of English, he ironically describes this as schizoglossia, a linguistic "disorder" that could occur in speakers who are exposed to more than one variety of their native or a foreign language.[67]

Language Conferences in 1913

In 1913, the debate about language policy entered its final phase, not only in Bosnia and Herzegovina, but also in other parts of the Austro-Hungarian Empire. The use of the domestic languages in Bohemia, Croatia and Slavonia, Bukovina, etc., in the education system, official documents and, in particular, in the military and railway sectors was discussed in Vienna and Budapest, as in previous years. While the interests of the inhabitants of these parts of the Monarchy could be represented by the delegates in the Austrian Reichsrat and the Hungarian Parliament (Reichstag), the inhabitants of Bosnia and Herzegovina did not have this option, as they had no delegates in the parliaments in Vienna

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[66] P. Kočić, "Za srpski jezik", *Otadžbina* 1 (1911). Quoted in: P. Kočić, *Sabrana djela* I–IV (Banja Luka–Belgrade: Besjeda, 2002), 310–313.

[67] "Although there are two official written languages, it is rather a case of schizoglossia than of diglossia, since these are little more than divergent dialects of one language. The official government policy during the past 25 years has been to promote the fusion of these two languages into one compromise norm […] The introduction of writing made possible the infinite extension of the language community beyond the immediate reach of the voice. It made possible the building of nations and empires, which in their turn became extended speech communities. Within these the pressure against schizoglossia was directed above all at the normalization and standardization of writing, but with the growth of other means of communication through travel, it came to embrace also speech at least of those who travelled. Only by reducing what Hockett has called the noise of the code could the institutions of modern societies be built". E. Haugen, "Schizoglossia and the Linguistic Norm". In *Monograph Series on Languages and Linguistics* 15, ed. Evelyn S. Firchow (Washington D.C.: Georgetown University Press, 1962), 63–74.

and Budapest. The region had a passive legal status. Before a draft law could be introduced, the approval of both the Austrian and Hungarian governments was required before it could then be submitted for imperial approval. In 1910, Bosnia and Herzegovina was granted a Land Statute but no Land Constitution. The inhabitants of Bosnia and Herzegovina were considered "members" of the Austro-Hungarian Empire but were not officially Austrian or Hungarian citizens.[68] The authority of the Diet in Sarajevo was very limited and restricted to secondary issues. The language issue, however, was of general interest and was discussed in Vienna and Budapest without representatives from Bosnia and Herzegovina. The legislative situation made it possible to put the language issue on the agenda of the Diet in Sarajevo and to form a commission that would present the matter to the ministries in Vienna and Budapest. This was also done. The members of this commission also sought to obtain the support of the Croatian and Serbian delegations in the parliaments of Vienna and Budapest. As in all other matters, the decision rested ultimately with the emperor or, as his representative, the Governor of Bosnia and Herzegovina. While the official newspapers of Bosnia and Herzegovina, such as the *Bosanska Pošta* and *Sarajevoer Blatt* [Sarajevski List], reported encouragingly on the positive developments in this matter, critical and sobering voices could be heard in the Austrian press, as well as in the privately owned newspapers of Bosnia and Herzegovina. The language issue regarding the status of Czech in relation to German in Bohemia, as well as Croatian in Croatia and Slavonia in relation to Hungarian, was of great interest and was the only language issue discussed at the parliamentary level. Notwithstanding the numerous economic and social concerns that resulted in political unrest, the question of language continued to dominate the Diet in Sarajevo throughout 1913.

The first session on the regulation of the official language and language of instruction in Bosnia and Herzegovina took place in the Diet (*Landtag*) in Sarajevo on 10 February. The legislative draft listed Serbo-Croatian with both scripts as the official language, including in oral and written external communications of the state railways in Bosnia and Herzegovina. On 19 February, a twelve-member delegation travelled to Vienna to brief Joint Finance Minister Bilinski on their activities. While the Ministry confirmed receiving the delegation, it denied that any negotiations had taken place, stating that "no such ne-

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[68] N. Wurmbrand, *Die rechtliche Stellung Bosniens und der Herzegowina* (Leipzig–Vienna, 1915), 95; quoted in: H. Hautmann, "Kriegsjustiz in Bosnien-Herzegowina unter Habsburgs Herrschaft". In *Zeithistoriker – Archivar – Aufklärer. Festschrift für Winfried R. Garscha*, eds. C. Kuretsidis-Haider and C. Schindler, (Vienna: DÖW, 2017), 67–81; cf. E. Bauer, *Zwischen Halbmond und Doppeladler. 40 Jahre Österreichische Verwaltung in Bosnien-Herzegowina* (Vienna–Munich: Herold Verlag, 1971).

gotiations had been planned" and that the delegation had travelled to Vienna "on their own initiative". The Bosnian-Herzegovinian newspapers subsequently reported on "negotiations on the language issue in Vienna", which was again denied in the government report "because the delegation did not have the mandate to conduct any negotiations".[69] With varying degrees of success, members of the Bosnian-Herzegovinian Diet undertook several visits to political representatives in Budapest and Vienna in the following months to present their case and obtain the necessary approval of the two parliaments of the Dual Monarchy. Returning to the Diet, they proceeded to submit reports on their meetings and participate in further debates. While the majority of the population initially focused on the implementation of their domestic language in all sectors of the country, with the question of naming the language of secondary importance, this issue increasingly became an obstacle. During the debate, the conflicting parties occasionally moved closer to each other, only to then take completely opposite positions – whether the language should be designated as the Land language, Serbo-Croatian or Croatian-Serbian. The District Government shrewdly brought the real language issue to the fore, which related to the continued use of the German language in strategically important sectors, noting that this matter was not within the Diet's jurisdiction. The authority of that lay exclusively with the emperor. The decision, however, had a significant impact on the local population's ability to obtain employment in the railway sector and was an important part of the initial legislative draft. This resulted in intense debates in the Diet and in the whole land. The existing cultural differences were looking for a way into the hegemonic situation. The question of the language name receded into the background. Finally, an agreement was reached on a language draft, which was essentially an adaptation of Austria-Hungary's existing language regulations and not the result of a year of debates and efforts. The announcement suggests that it could be said to have been reached democratically. This was not yet legally binding, however, as the Diet could only approve legislative drafts and not laws. According to this provision, a law had to be reviewed and approved by both ministries of Austria-Hungary before it could be sanctioned by the emperor. The official report on the adoption of the language draft at the meeting of 30 December 1913 in the Diet in Sarajevo stated:

> Sarajevo, 30 December. The Diet discussed the language draft during today's session. The draft, which comprises six paragraphs, stipulates that Serbo-Croatian is to be designated as the official language and language of instruction, in all offices and institutions and for all branches of civil administration in Bosnia and Herzegovina,

[69] "Konferenzen über die Sprachenfrage". In *Politische Chronik der österreichisch-ungarischen Monarchie*, IV – *Bosnisch-herzegowinischer Landtag* 1913, vol. 2, ed. K. Neisser (Vienna, 1913), 63–64.

> both internally and externally. In the internal communications of the railway service, Serbo-Croatian is to be used strictly in accordance with military interests. Private schools that do not use Serbo-Croatian as the language of instruction can only be granted public status if they incorporate Serbo-Croatian as a compulsory subject. It is further stipulated that the two scripts of the Serbo-Croatian language are to be regarded as equal and must be used in parallel and equally in all official announcements, public notices, public records and seals. It is an established fact that individuals without proficiency in the Serbo-Croatian language are ineligible for employment in the Bosnian-Herzegovinian civil service or on the state railways. However, there exists a possibility of employment on a temporary basis, should special administrative interests so require. However, the persons concerned are required to acquire proficiency in Serbo-Croatian within three years; failure will result in the termination of their permanent employment. As such, employees already in service are obliged to learn the domestic language within three years of the publication of the law. Should they fail to do so, however, exceptions can be made to keep them in service.[70]

A year later, after interruptions to parliamentary work due to social and political crises, the legislative draft on the language issue was adopted by the Diet in a session held from 31 December to 1 January 1914.

In January 1914, the resulting decree proclaimed Serbo-Croatian, with the use of two scripts, as the official language of Bosnia and Herzegovina.[71]

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[70] "Sarajevo, 30. Dezember. Der Landtag beriet in seiner heutigen Sitzung die Sprachenvorlage. Der aus sechs Paragraphen bestehende Entwurf bestimmt die Festsetzung der serbokroatischen Amts- und Unterrichtssprache bei sämtlichen Behörden, Ämtern und Anstalten für alle Zweige der Zivilverwaltung im Verwaltungsbereiche Bosniens und der Herzegowina im inneren wie im äußeren Dienstverkehr. Allein im inneren Dienste der Landesbahnen wird die serbokroatische Sprache nur soweit benützt, als es die militärischen Interessen gestatten. Den Privatschulen mit nicht serbokroatischer Unterrichtssprache kann nur dann das Öffentlichkeitsrecht verliehen werden, wenn sie die serbokroatische Sprache als obligaten Lehrgegenstand führen. Die beiden Schriftarten der serbokroatischen Sprache sind gleichberechtigt und müssen gleichzeitig und gleichmäßig bei allen amtlichen Verlautbarungen, öffentlichen Kundmachungen, öffentlichen Aufschriften und Siegeln angewendet werden. Niemand kann im bosnisch-herzegowinischen Landesdienst oder bei den Landesbahnen angestellt werden, der nicht der serbokroatischen Sprache mächtig ist.– wenn besondere Interessen der Verwaltung es erfordern, kann dies Provisorisch geschehen. Die Betreffenden müssen aber binnen dreier Jahre die serbokroatische Sprache erlernen, ansonsten können sie nicht definitiv angestellt werden. Bereits im Dienste befindliche Angestellte sind verpflichtet, binnen dreier Jahre nach der Publikation des Gesetzes die Landessprache zu erlernen, sonst kann ein weiteres Verbleiben im Dienste mir ausnahmsweise gestattet werden". *Parlamentarische Chronik*, *Bosnisch-herzegowinischer Landtag*, 1913/12, 865.

[71] "The Law on the Regulation of Official and Educational Language in Bosnia and Herzegovina", *Stenografski izvještaj II sjednice sabora Bosne i Hercegovine*, 3 December 1914, ABH, ZMF, Pr. BH, 10/1914.

> The Parliament [...] has passed a decree determining Serbo-Croatian as the Land language. It is to be considered the internal and external official language. Henceforth, the German language shall be used for military purposes in the railway service only.[72]

This achieved synchronisation with the language names introduced in the other parts of the Monarchy at the end of the 19th century within the framework of the "South Slavic question". Only six months later, the war broke out. As a Serbian symbol, the Cyrillic alphabet was avoided in Bosnia and Herzegovina's public life but not banned in internal government communications. While Governor Potiorek (1911–1914) had not addressed it explicitly, the new Governor Sarkotić turned his attention to this issue immediately upon assuming office in December 1914. Due to existing laws and the Austrian-Hungarian defeats up to the autumn of 1915, the name "Serbian" and the Cyrillic script were not outlawed officially, but remained largely absent. Finally, when the use of the Serbian language and the Cyrillic alphabet was banned completely in Serbia, which was occupied at the end of 1915, the authorities also enacted this regulation in Bosnia and Herzegovina.[73] Soon afterwards, the same interdict was imposed in occupied Montenegro. Basically, from then on, the regulations regarding the name of the language and use of the script reflected the initial decree of 1879: Serbo-Croatian with the Latin script.

Conclusion

In summary, the language policy strategies pursued in Bosnia and Herzegovina and, more broadly, in the entire Dual Monarchy, can be viewed as a roundabout with several exits, most of which were dead ends, with only a few proving accident-free. This is by no means an exceptional case in global language policy, regardless of the historical period.

In the Provisional Regulation during the initial year of occupation (1879), Serbo-Croatian with the Latin script was named the "official written language within Bosnia and Herzegovina", while German was designated as the official language from the district administration level upwards. From 1880 onwards,

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[72] "Der Landtag […] hat ein Sprachengesetz erledigt, durch welches Serbokroatisch als Landessprache festgesetzt wird. Es hat als innere und äußere Amtssprache zu gelten. Nur im Eisenbahndienst wird auch fernerhin noch aus militärischen Gründen nebenbei die deutsche Sprache zulässig sein", *Neuigkeits–Welt–Blatt*, Vienna, 8 January 1914, 13.

[73] For more on the issue of language and education policy during the occupation of Serbia and Montenegro, see G. Ilić Marković, "Okupacioni list *Beogradske novine / Belgrader Nachrichten* 1915–1918", *Naučni sastanak slavista u Vukove dane* (Beograd: MSC, 2015), 143–156.

the regulation on the designation of the language as "Land language" (*Landessprache*) was supplemented by the use of the Cyrillic and Latin scripts. The terms "Croatian" and "Serbian" continued to be used for naming the language of these communities. The term "Bosnian" was temporarily adopted by the Muslim community, predominantly with the Latin script. In 1907, the designation "Serbo-Croatian", with the use of both scripts, became official, with the continued use of the term Land language if required. In January 1914, the Serbo-Croatian language, written in two scripts, was proclaimed the official language of Bosnia and Herzegovina. In July of the same year, the First World War broke out. The term "Serbo-Croatian" for the language was maintained, while the Cyrillic script was used infrequently and avoided until it was finally banned in early 1916.

The current language policy of Bosnia and Herzegovina continues to be informed by this historical background. According to the 2019 census,[74] Bosnia and Herzegovina had 3,531,159 inhabitants, of whom 1,866,585 listed Bosnian as their mother tongue, 1,086,027 Serbian, and 515,481 Croatian.[75] On top of this, 27,299 people identified as speakers of Serbo-Croatian, and 1,897 opted for the three–part term Bosnian/Croatian/Serbian. This correlates broadly with the data on national affiliation in Bosnia and Herzegovina, whose population includes 1,769,592 Bosniaks, 1,086,733 Serbs, and 544,780 Croats.[76] Mirroring the introduction of the term Bosniaks (1993),[77] Bosnian is also referred to as Bosniak language in linguistic circles outside of Bosnia, while Croats in Bosnia and Herzegovina refer to their language as Croatian and Serbs as Serbian. This further reinforces the correlation of nation–language–religion in Bosnia and Herzegovina today.

From 1918 onwards, in the interwar period, during the Second World War, and up to the present day, various language policy measures have been implemented in the newly founded states.[78] All of them reflected the prevailing politics of the respective nascent states and primarily sought to establish

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[74] The census conducted in October 2013 provided the basis for these results, which remained controversial.

[75] *Census of Population, Households and Dwellings in Bosnia and Herzegovina. Ethnicity/National Affiliation, Religion and Mother Tongue* (Sarajevo: Agency for Statistics of Bosnia and Herzegovina, 2019), 957–984.

[76] A few of them identified themselves as Bosnian (37,110), Bosnian and Herzegovinian (11,406), Herzegovinian (498), Muslim, Bosnian Muslim (242), Yugoslav (2,570).

[77] Until 1974 "Bosnian Muslims", and from 1974 a constituent nation of Yugoslavia designated as "Muslims" (with capital M), in contrast to "muslims" (lowercase) referring to the religious group.

[78] On language issues in public schools in Bosnia and Herzegovina from 1945 to the 1970s see M. Okuka, *Jezik i politika* (Sarajevo: Oslobođenje, 1983).

the name of the language, regardless of whether they were followed by standardisation attempts. In the First and Second Austrian Republics (1918–1938, from 1945), the term "Serbo-Croatian" was retained in public discourse and for academic purposes. At a time when there were no standard works for the Bosnian language, the tripartite term "Bosnian, Croatian, Serbian" (BCS, without slashes) was adopted in the Austrian public education sector (including universities) in the 1992/93 school year and verified in 1996 by circular letter.[79] The acronym B/C/S (B/K/S) continues to dominate in Austria's public sector, amidst an enduring absence of normative grammars to regulate its usage. In elementary public schools, teaching materials using this tripartite language name were developed by the teachers themselves, as well as some publications printed in Austria to cater to mother tongue lessons offered in public schools. To date, there is no clear institutional consensus in Austria as to whether this is one pluricentric language or three standard languages, as attested by the predominant use of the plural "languages", immediately followed by the abbreviation BKS (without separators, conversely implying that this is one language) – "languages BKS". As in the time of the Monarchy, the number of privately funded education models operating alongside the public school system has been growing since the 1990s. These are organised by Serbian, Croatian and Bosniak civic associations or religious communities, referring to the languages as Croatian, Serbian or Bosnian. Since 1993, several inquiries on the distinction and division of the Bosnian, Croatian and Serbian languages versus maintaining it as a single language have been made at the state level, citizens' initiatives have cropped up, and conferences have been held. Experts have been consulted and their papers presented. Nevertheless, this issue has caused endless debate among parents, teachers, and students, as well as in the political sphere and educational institutions, year after year. According to the circular issued by the Austrian Ministry of Education in 2014,[80] differentiated internal language programmes for Serbian, Croatian and Bosnian can be offered, depending on the pupil groups and the availability of teachers for these languages. The registration form issued by the Federal Ministry of Education, Science and Research for mother tongue (first language) teaching allows the name of the desired language to be defined by the applicant.

Glottonymy is once again coming to the fore.

[79] No. 10/1996, GZ. 27.901/8-V/5a/96.

[80] No. 12/2014 – GZ BMBF-27.901/0025-I/Va/14.

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The Ruthenian Language in Serbia from the Perspective of Endangerment

Abstract: The paper explores the endangerment of the Ruthenian language in Serbia through a mixed-method approach, combining quantitative and qualitative analyses of data obtained from a sociolinguistic questionnaire (*VLingS Questionnaire 1.0*; Mirić et al. 2025) completed by 78 members of the Ruthenian community. The field research was conducted in 2023 as part of the project "Vulnerable Languages and Linguistic Varieties in Serbia" (VLingS), funded by the Science Fund of the Republic of Serbia within the program IDEAS (2022–2024). The study presents findings from the quantitative analysis of responses related to the educational background of speakers (V_2, V_5), their emotional and attitudinal relationship to the Ruthenian language (XII_4, XII_5), and perspectives on language maintenance and revitalization (XIV_4, XIV_6, XIV_7). It further examines patterns of language use across different social domains (III_1_1–III_1_6) and the intergenerational transmission of the language (II_5, II_6, II_7). Notable discrepancies emerged between the respondents' declared attitudes and reported language practices, as well as between their stated values and actual engagement in preservation efforts. To address these inconsistencies, the paper includes a qualitative analysis of open-ended responses concerning language maintenance (XIV_5 and XIV_9), offering interpretative insights into the underlying sociolinguistic dynamics. The findings contribute to a deeper understanding of the complex factors affecting the sustainability of minority languages in multilingual settings.

Keywords: Ruthenian language, Rusyn language, Serbia, sociolinguistics, sociolinguistic questionnaire, language revitalisation, endangered languages, ethnic minorities, attitudes towards language, language use.

Ruthenians and their Language

The Ruthenians are Eastern Slavs by historical origin and Greek Catholics by religion. Nevertheless, linguists remain divided regarding the origin of the Rusyn/Ruthenian[1] language: some classify it as a West Slavic language, sup-

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[1] Although the use of different language designations—*Ruthenian* or *Rusyn*—may at times reflect an implicit (or explicit) position of the author regarding the origin and classification of the language (with Ruthenian typically implying a connection to Ukrainian origins and Rusyn sometimes used to emphasize the language's authenticity and to ex-

porting the pro-Slovak hypothesis; others consider Rusyn to be a distinct East Slavic language that may be viewed as a branch of Ukrainian; a third group argues that it is a separate East Slavic language formed at the intersection of East and West Slavic linguistic spheres. Today, Rusyn is regarded as the youngest Slavic standard language. It was codified in 1923 by Havryil Kostelnyk in his work Grammar of the Bačka Rusyn Speech (Popović 2010).

Aleksander Duličenko (2009) classifies the Rusyn language as a Slavic microlanguage of the insular type. By this, he refers to a language with a relatively small number of speakers that has undergone codification and exhibits established standard-language norms in the domains of phonetics, grammar, and lexicon, with a tendency toward further stabilization and standardization. Such a language is characterized by stylistic polyfunctionality within an organized and socially supported standard-language process.

Ljudmila Popović (2022) approaches the terms "small" and "large" language from a somewhat different perspective. She argues that a single language may simultaneously be regarded as both small and large, depending on the extent of its presence in the public life of a given society. The author begins from the thesis that every standard language can function in two variants: a dominant, majority variant, typically represented by the official language of a state, characterized by a standardized norm subject to stratification based on social and territorial factors; and a recessive, minority variant, which appears as a regional, minoritarian, ethnic, or non-territorial language within a country or a part of it, alongside another majority means of public communication. The author further outlines several scenarios in which the relationship between the dominant and recessive variants may shift or vary: (1) the dominant variant, due to geopolitical circumstances, becomes recessive and gradually disappears; (2) the dominant variant becomes recessive, but over time reorients toward a new standard and once again attains dominant status in accordance with it; (3) the dominant variant becomes recessive, reorients toward a new norm, and officially regains dominant status, but in practice remains recessive due to diglossia; (4) the language has functioned as a recessive variant since the emergence of its standard expression, maintaining this status throughout its development; (5) the recessive variant splits into several idioms that, in their further development, orient toward divergent standards; (6) the recessive variant develops according to an authentic norm, one with no analogue in any dominant variant, and gradually acquires dominant status; and (7) several closely related recessive variants form a koiné—a norm that may attain the status of a dominant variant. According to

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plicitly or implicitly sever ties with Ukrainian), both terms will be used interchangeably and concurrently in this paper, without any such ideological implications. The various scholarly positions on the Ruthenian/Rusyn language will be addressed only briefly.

the author, languages that are unified under a shared glottonym—Rusyn—yet differ fundamentally in terms of the standard to which they orient, may serve as an example of the fifth scenario outlined above.

While a similar variety is spoken in eastern Slovakia, southeast Poland, and the Transcarpathia region of western Ukraine, Vojvodina Rusyn is spoken in the Vojvodina region of Serbia and in Croatia. The first large enclave of Ruthenians immigrated to Banat and Bačka in the middle of the 18th century from the northeastern regions of Hungary. Nevertheless, January 17, 1751, was recorded as the day of the first mass wave of Ruthenian immigration to Vojvodina, when an agreement was signed on the immigration of 200 Ruthenian families to Ruski Krstur. The seats of Ruthenian colonies in Vojvodina – the villages of Ruski Krstur and Kucura and the city of Novi Sad became the centers of Ruthenian cultural and social life in the 20th century. Since 1973, the Ruthenian language has been one of the six official languages of Vojvodina. Today, the Ruthenians in Serbia have a National Council, the *Ruske Slovo* newspaper and publishing house, a Ruthenian editorial office at the Institute for Textbooks, the Institute for Culture, a radio program and TV shows. Ruthenians attend education in their language at all levels, including a preschool institution, three primary schools, the only grammar school in the world in the Ruthenian language, and the Department of the Ruthenian Language at the Faculty of Philosophy in Novi Sad (Ramač 2002; Popović 2010; Fejsa 2012; Dražović 2018, 77–78).

Assessments of the Vulnerability of the Rusyn Language in Serbia

As reported by Sorescu-Marinković, Mirić, and Ćirković (2020), various global databases of vulnerable and endangered languages provide differing assessments of the Rusyn language. The authors note that according to UNESCO's Atlas, Vojvodina Rusyn is considered definitely endangered. It is spoken in Serbia and Croatia, more precisely in the region of Bačka in Vojvodina and the cross-border areas in Croatia. The estimated number of speakers is 30,000. On the other hand, Ethnologue locates Ruthenian[2] on the territory of South Bačka in Vojvodina, precisely in Ruski Krstur, with an estimated number of 11,300 speakers.[3]

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[2] https://www.ethnologue.com/language/rsk/. Accessed: September 1, 2025.

[3] The term *Rusyn* is used by Ethnologue only to designate the language spoken in Ukraine and Slovakia (Poland is not mentioned), and variant glottonyms are not provided (https://www.ethnologue.com/language/rue/. Accessed: September 1, 2025). Terminological note: the glottonyms Rusyn and Ruthenian are used almost interchangeably for both dialects of the Rusyn language: for the one in Serbia and Croatia, as well as for the one in Slovakia, Ukraine, and Poland. More specific glottonyms include Carpatho-Rusyn, which refers to the Rusyn language in the East (Slovakia, Ukraine, and Poland),

The status of Rusyn in Serbia is considered vigorous (level 6a), being guaranteed by the Statute of the Autonomous Province of Vojvodina. Furthermore, it is noted that, regarding size and vitality, Rusyn is assessed as mid-sized and stable, i.e., not being sustained by formal institutions, but still the norm in the home and community, with all children learning and using the language.

VLingS Project and VLingS Questionnaire 1.0

Since the present research stems from a broader project dedicated to vulnerable languages, the following section provides an overview of its key features and objectives.

Vulnerable Languages and Linguistic Varieties in Serbia (VLingS)[4] was a research project supported by the Science Fund of the Republic of Serbia within the framework of the IDEAS Program. The project lasted 36 months, from January 2022 until December 2024. The project aimed to address the fact that, in recent decades, it became increasingly evident that numerous languages across the globe were facing the threat of extinction. In the context of Serbia, however, existing databases often provided inconsistent assessments of language endangerment and frequently lacked accurate or comprehensive data concerning the linguistic varieties spoken within the country. To address this gap, the primary objective of the project was to develop a reliable and precise instrument for evaluating the degree of language endangerment and vulnerability. This tool was applied to a statistically significant sample of speakers residing in Serbia. The instrument was tested on the following linguistic varieties, selected based on both international endangerment assessments and insights gained through our field research: Aromanian, Banat Bulgarian, Vojvodina Rusyn (Ruthenian), Judezmo (Ladino), Romani (Vlax and Balkan varieties), Megleno-Romanian, Vlach, and Bayash Romanian. The outcome was a scientifically grounded evaluation of the vitality and vulnerability of these varieties, providing a solid reference for future sociolinguistic research. A distinctive feature of the research was its dual methodological approach: in addition to administering a carefully designed sociolin-

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while for the one in Serbia (Western Bačka: Ruski Krstur, South Bačka: Kucura, Northern Bačka: Novo Orahovo, Srem: Šid, Berkasovo etc.) and Croatia the designations Vojvodinian Rusyn and Pannonian Rusyn are also used. The differentiation of Rusyn language varieties may be articulated in greater detail: the Bačka-Srem variant (in Serbia and in Croatia), the Prešov variant (in Slovakia), the Lemko variant (in Poland), and the Transcarpathian variant (in Ukraine) (Fejsa 2018b).

[4] More information about the VLingS project, the project team members, project results, and other related content can be found on the project's website: https://vlings.rs/ (accessed: May 29, 2025).

guistic questionnaire, the project included documenting and archiving spoken language samples across three generations of speakers. This comprehensive data collection enabled the creation of an encompassing linguistic database and an interactive digital map, offering detailed insights into the vulnerability of specific linguistic varieties within their respective communities.

The research presented in this paper is based on data collected during fieldwork conducted within the Rusyn community in Vojvodina in 2023, within the framework of the VLingS project. The study was carried out in three Rusyn communities from Serbia: Ruski Krstur, Kucura, and Novi Sad. Participants voluntarily took part in the study by agreeing to complete the *VLingS Questionnaire 1.0*, developed within the framework of the project (Mirić et al. 2025), and to engage in interviews with the researchers. A total of 78 respondents participated in the research. Each of the three communities in which the fieldwork was conducted was approximately equally represented, with participants of both genders and across all age groups. The questionnaire was completed in Serbian, and its English translation was published as an appendix to Mirić et al. 2025.

The main version of the questionnaire[5] includes 151 questions and subquestions divided into the following 16 sections (a detailed account of the questionnaire development process, as well as an explanation of why a new instrument was required for the project—despite the existence of related methodologies—is provided in Mirić et al. 2025):

I General data about linguonyms and language usage
II Data about language acquisition and intergenerational language transmission
III Domains of language usage
IV Literacy
V Education
VI Institutional support and linguistic landscape
VII Publications in the given language
VIII Media
IX Religious service
X Cultural events
XI Language level self-assessment
XII Respondents' feelings towards own language

[5] Prior to the development of the main version of the questionnaire, titled *VLingS Questionnaire 1.0*, an initial pilot version—*VLingS Questionnaire 0.0*—was created. This preliminary version comprised 190 questions and sub-questions, organized into sixteen thematic sections (for a detailed overview, see Mirić, Sokolovska and Sorescu-Marinković 2024).

XIII Ethnic and cultural identity
XIV Language maintenance and revitalization
XV Demographic information about the respondent
XVI Final remarks

Motivation for the Research

The impetus or inspiration for this research originated in 2023, during fieldwork conducted within the Rusyn community in Vojvodina. At that time, while administering questionnaires, it was observed that community members most frequently stated that Rusyn was their mother tongue or first language (see Mirić, Sokolovska and Sorescu-Marinković 2024), that they spoke it fluently, used it daily and whenever possible, and regarded it as an essential component of their identity. However, they simultaneously expressed regret over the gradual disappearance of their language, often criticizing parents who do not speak Rusyn with their children and remarking that little can now be done to revitalize it.

Census (PSDS 2022; Đurić et al. 2014, 151) data in Serbia unequivocally demonstrate a decline in the number of people reporting Rusyn as their mother tongue (2002: 13,458; 2011: 11,340; 2022: 8,725), a trend recognized by members of the Rusyn community themselves.

Results from the field study, based on a sample of 78 respondents belonging to the Rusyn community, indicate that 73 (93.59%) of participants believe that the Rusyn language is dying out. This perception contrasts with the responses of 67 (85.90%) participants who stated that all generations in Serbia, including children, speak the Rusyn language. In contrast, only 11 (14.10%) respondents indicated that the language is spoken primarily by the parental generation and older individuals.

The key question emerging from these findings is: Why is the language in decline if its speakers hold such strong and positive attitudes toward it? In other words, is there a connection between language attitudes and linguistic experience (schooling, social environment, stigmatization, etc.) on the one hand, and language behavior—that is, actual language use—on the other?

Previous Research

The Rusyn language in Vojvodina has been a subject of linguistic and other research continuously for over a century (e.g., Kostel'nik 1923; Kočiš 1978; Duličenko 2002; Popović 2019; Ilić 2021; Mudri 2022; Kwoka 2023).

The most recent comprehensive study on the degree of ethnolinguistic vitality of the Rusyn language in Serbia was conducted and published bilingually

by Biljana Dražović (2018). The research examines ethnolinguistic vitality based on the parameters proposed by UNESCO. Dražović (2018: 109) arrived at the following evaluations for each factor:

1. Intergenerational language transmission – score: 4
2. Absolute number of speakers – score: 3
3. Proportion of speakers within the total population – score: 3
4. Shifts in domains of language use – score: 4
5. Response to new domains and media – score: 3
6. Availability of materials for language learning and literacy – score: 5
7. Governmental and institutional attitudes, language policies, official status, and use – score: 4
8. Community members' attitudes toward their mother tongue – score: 5
9. Type and quality of language documentation – score: 4

Based on the arithmetic mean of the scores listed above, the ethnolinguistic vitality of the Rusyn language in Serbia is assessed as "good," with an average score of 3.88.

Although Dražović (2018, 109–113) discusses each of these evaluations in detail in the concluding section of her study, this paper will focus solely on the factors that received the lowest scores, as they represent the weakest links in the chain of efforts aimed at preserving and revitalizing the Rusyn language.

The author (Dražović 2018, 82–83, 91–92, 109) emphasizes that the most critical issue concerns the absolute number of speakers, that is, the number of members of the community, given that negative demographic trends—such as low fertility rates and ongoing migration—have also affected the Rusyn population. While these challenges are common across Serbia and impact the majority of its ethnic minorities, their consequences are particularly severe for the already small Rusyn community. Adverse socioeconomic conditions, low living standards, and an educational system insufficiently adapted to contemporary needs contribute to the increasing emigration of Rusyns to European countries, Canada, and the United States in search of better living conditions. The continuous decline in the overall number of Rusyn community members represents one of the greatest threats to the preservation and survival of the community itself, and, by extension, of the Rusyn language.

The low score associated with the share of Rusyn language speakers within the overall population (Dražović 2018, 83, 92–93, 110) can also be attributed to natural sociocultural processes, including interethnic marriages with members of other ethnic minorities and the geographic dispersion of the Rusyn population across the territory of the Republic of Serbia. Although Rusyn communities are predominantly concentrated in Vojvodina (e.g. Ruski Krstur, Kucura, Novi Sad, as well as Orahovo, and even Kula, Vrbas or others), individuals

are increasingly relocating to other parts of Serbia for various reasons—such as employment, family obligations, or education (see PSDS 2022, 27). Interethnic marriages inherently represent a challenging context for the consistent and sustained cultivation of the mother tongue and the development of satisfactory language competencies among younger generations. Rusyns residing in urban areas where they make up a negligible share of the population are compelled to use the dominant language in most societal domains in order to integrate into social structures and secure their basic human rights. As a result, younger individuals are increasingly less proficient in their language and more frequently identify another language—most commonly Serbian—as their first language. Although most Rusyns do not perceive proficiency in their language as a disadvantage in societal life, the dominant language is nevertheless regarded as the sole instrument of social and economic advancement, which contributes to the growing phenomenon of ethnolinguistic mismatch or alloglot Serbian language speakers within the Rusyn community, particularly pronounced among the younger population.

Another parameter indicating the precarious status of the Rusyn language is its limited capacity to adapt to new domains and modern media (Dražović 2018). Under the growing influence of globalization and the privileging of dominant world languages, Rusyn has failed to establish an equal and meaningful presence in these spheres, thereby halting its linguistic modernization and impeding the development of its full functional potential. Although the language is used in the media in accordance with legal provisions that guarantee national minorities the right to information in their mother tongue, substantial structural and content-related shortcomings are evident. Inadequate technical infrastructure within the editorial offices responsible for producing radio and television programming in the Rusyn language, combined with a narrow thematic orientation primarily centered on folklore and tradition, results in content that does not adequately reflect the interests or communicative needs of the younger, modern Rusyn population. The severely limited online presence of the Rusyn language constitutes a critical shortfall, the long-term consequences of which may pose a serious threat to the language's vitality.

The Scope and Aim of the Study

To address the question posed in the section *Motivation for the research*, namely "Why is the language in decline if its speakers hold such strong and positive attitudes toward it?", I selected key, representative questions from the following sections of the *VLingS Questionnaire 1.0*: *V Education* (V_2, V_5), *II Data about language acquisition and intergenerational language transmission* (II_5, II_6, II_7), *XII Respondents' feelings towards own language* (XII_4, XII_5), and *XIII Eth-*

nic and cultural identity (XIII_1, XIII_2), and conducted a quantitative analysis (descriptive statistics), as predominantly positive responses to these questions would typically be expected to indicate language vitality (Ehala 2011; Sokolović 2014, 2015; Fejsa 2018a; Sorescu-Marinković, Mirić and Ćirković 2020; Mirić 2023).

What prompted this study, however, was precisely the discrepancy between the responses to these selected questions (which, as will be shown below, are almost entirely positive and consistent) and the responses to questions from two other sections of sections of the *VLingS Questionnaire 1.0*, precisely *III Domains of language usage* (III_1_1–III_1_6) and *XIV Language maintenance and revitalization* (XIV_4, XIV_6, XIV_7, XIV_8), which were also subjected to quantitative analysis.

In the discussion following the presentation of the quantitative results, I propose a possible explanation for this discrepancy. This discussion will be supplemented with a qualitative analysis of the descriptive answers to the questions from the section *XIV Language maintenance and revitalization* (XIV_5 and XIV_9).

Quantitative analysis of responses to selected questions from the *VLingS Questionnaire 1.0*

V Education		
V_2: Did you learn your language as a separate subject at school in Serbia?		
1. **YES 71/78 (91.03 %)**	2. NO 7/78 (8.97 %)	3. I didn't go to school 0/78 (0 %)
V_5: Has anyone in your family studied your language as a separate subject at school (in Serbia)?		
1. **YES 74/78 (94.87 %)**	2. NO 3/78 (3.85 %)	3. I don't know 1/78 (1.28 %)

II Data about language acquisition and integrational language transmission		
II_5: If you have children, do they speak your language?		48/78 (61.54 %)
1. No, they don't speak the language.		1/48 (2.08 %)
2. Yes, they can use some words.		5/48 (10.42 %)
3. Yes, they can use simple sentences.		0/48 (0 %)
4. Yes, they speak the language fluently.		**42/48 (87.50 %)**
5. I don't know if they speak the language.		0/48 (0 %)
II_6: If you have children, in which language do you communicate with them?		
Rusyn 37/48 (77.08 %)	Serbian 6/48 (12.50 %)	Both Serbian and Rusyn 5/48 (10.42 %)
II_7: If you have grandchildren, do they speak your language?		19/78 (24.36 %)
1. No, they don't speak the language.		1/19 (5.26 %)
2. Yes, they can use some words.		1/19 (5.26 %)

3. Yes, they can use simple sentences.	3/19 (15.79 %)
4. **Yes, they speak the language fluently.**	**14/19 (73.68 %)**
5. I don't know if they speak the language.	0/19 (0 %)

XII Respondents' feelings towards own language		
XII_4: Has anyone ever prohibited you from speaking your language?		
1. YES 7/78 (8.97 %)	**2. NO 71/78 (91.03 %)**	3. I don't know 0 (0 %)
XII_5: Has anyone ever prohibited members of your family from speaking your language?		
1.YES 7/78 (8.97 %)	**2. NO 66/78 (84.62 %)**	3. I don't know 5 (6.41 %)

XIII Ethnic and cultural identity		
XIII_1: Do you think your language is important?		
1. YES 73/78 (93.59 %)	2. Partially 5/78 (6.41 %)	3. NO 0 (0 %)
XIII_2: Does your language represent your community and the culture of your community?		
1. YES 78/78 (100 %)	2. Partially 0 (0 %)	3. NO 0 (0 %)

III Domains of language usage					
III_1: How often do you use your language in conversations with the following persons or in the following situations?					
Always	**Often**	**Sometimes**	**Rarely**	**Never**	**N/A**
1. With family members					
66 (84.62 %)	6 (7.69 %)	5 (6.41 %)	1 (1.28 %)	0 (0 %)	0 (0 %)
2. With friends					
32 (41.03 %)	**31 (39.74 %)**	**11 (14.10 %)**	4 (5.13 %)	0 (0 %)	0 (0 %)
3. With neighbours					
38 (48.72 %)	**13 (16.67 %)**	**8 (10.26 %)**	**10 (12.82 %)**	**9 (11.54 %)**	0 (0 %)
4. With colleagues at work					
17 (21.79 %)	9 (11.54 %)	9 (11.54 %)	7 (8.97 %)	**16 (20.51 %)**	**20 (25.64 %)**
5. With members of the clergy					
61 (78.21 %)	2 (2.56 %)	2 (2.56 %)	3 (3.85 %)	3 (3.85 %)	**7 (8.97 %)**
6. With public officials (e.g. at the municipality/local community/post office/police)					
8 (10.26 %)	4 (5.13 %)	**15 (19.23 %)**	**25 (32.05 %)**	**26 (33.33 %)**	0 (0 %)

XIV Language maintenance and revitalisation		
XIV_4: Is it important to you to preserve/revitalize (or learn) your language?		
1. YES 77/78 (98.72 %)	2. NO 0 (0 %)	3. It doesn't matter to me 1/78 (1.28 %)
XIV_6: Is it important to you that your language is passed on to younger generations?		
1. YES 78/78 (100 %)	2. NO 0 (0 %)	3. It doesn't matter to me 0 (0 %)
XIV_7: Is it important to you that your language is introduced or maintained in schools in Serbia?		

1. YES 77/78 (98.72 %)	2. NO 0 (0 %)	3. It doesn't matter to me 1/78 (1.28 %)
XIV_8: Is your language disappearing?		
1. YES 73/78 (93.59 %)	2. NO 4/78 (5.13 %)	3. I don't know 1/78 (1.28 %)

The presented results indicate that 91.03% of respondents studied the Rusyn language in school, and that in 94.87% of cases, at least one other family member has also received formal education in Rusyn. Among these respondents are individuals who attended schools where Rusyn was the medium of instruction, as well as those who were enrolled in the subject Rusyn Language with Elements of National Culture or a similar course, depending on their year of birth and the period during which they attended school.

Regarding the intergenerational transmission of the language, 48 out of 78 respondents reported having children. Among their children, 87.50% are reported as fluent in Rusyn, 10.42% can use some words, and 2.08%—i.e., the child or children of a single respondent—do not speak the Rusyn language at all. Furthermore, 77.08% of respondents communicate exclusively in Rusyn with their children, 10.42% use both Rusyn and Serbian, while 12.50% speak only Serbian with their children. Out of all 78 respondents, 19 have grandchildren, of whom 73.68% are fluent speakers of Rusyn.

In response to the question of whether they have ever been prohibited from expressing themselves in the Rusyn language, 91.03% of respondents reported no such negative experiences, while 8.97% did report having encountered such restrictions. Among the seven reported cases (8.97%) of language prohibition, two occurred within the family—imposed by family members who do not understand Rusyn, typically in the context of mixed marriages—one occurred in the school setting (though it was not specified whether the restriction came from teachers or peers), one respondent declined to provide details ("not worth mentioning"), one case involved "malicious children in the street," another referred to "the neighborhood," and one respondent stated that such incidents occurred during the wars of the 1990s in the former Yugoslavia. When asked whether they were aware of any family members having experienced such prohibitions, 6.41% responded that they did not know, 84.62% indicated that there had been no such instances, while 8.97%—again, seven cases—reported that they knew of family members who had been prohibited from using the Rusyn language. Of these seven cases, one respondent stated that the restriction had been directed at their daughter, while six respondents referred to the period of forced Magyarization at the end of the 19th and beginning of the 20th century. It is important to note that these instances were not related to repression by members of the Serbian majority population or the authorities of the Republic of Serbia.

With regard to ethnic and cultural identity, the responses were overwhelmingly positive. A total of 93.59% of respondents stated that their language is important to them, while 6.41% considered it to be only partially important—typically qualifying their response out of respect for other languages, noting that while Rusyn is indeed important, other languages also hold significance. All respondents unanimously agreed that the Rusyn language represents their community and its culture (100%).

The question regarding the domains of language use initially caused some confusion among respondents. Without additional clarification on how to approach this question, most participants would have selected the response "Always" across all items, based on the assumption that they communicate exclusively with individuals who speak Rusyn. It was only after the researchers explained that they should consider communication with all individuals they regard as friends—and then, based on the totality of that communication, determine the approximate frequency of speaking Rusyn with friends—that more nuanced and accurate responses were obtained. This perception stems from an unwritten rule within the linguistic behavior of members of the Rusyn community: namely, that the Rusyn language, as a matter of politeness and respect for all participants in an interaction, is used only under so-called ideal conditions—that is, when all interlocutors are proficient in Rusyn and agree to use it as the language of communication. This is a rare occurrence in groups larger than three people.

The results of our questionnaire indicate that the highest frequency of Rusyn language use occurs within the family and in interactions with representatives of the Greek Catholic Church. Within the family, 84.62% of respondents speak exclusively in Rusyn, while an additional 7.69% report frequent use. In communication with church representatives, 78.21% of respondents always speak Rusyn, 2.56% frequently, another 2.56% occasionally, 3.85% rarely, and 3.85% never. Additionally, 8.97% of respondents reported not attending church at all, and their answers were classified as *not applicable* to this question. The situation is more varied in conversations with neighbors and friends (who are often the same individuals). Nevertheless, 48.72% of respondents reported using only Rusyn in their immediate non-family environment (i.e., with neighbors), while 41.03% reported speaking exclusively Rusyn with friends. The lowest frequency of language use was recorded in public institutions and workplace settings. At work, 20.51% of respondents reported never using Rusyn, although 21.79% reported always using it—an outcome clearly dependent on the specific work environment. In public institutions, 33.33% of respondents reported never using Rusyn, 32.05% reported rare usage, and 19.23% reported occasional use. When asked why this was the case, respondents explained that there was simply no need to use Rusyn in such settings, as they are fluent in Serbian. Moreover,

in public institutions, the priority is to efficiently complete one's business, and therefore, conversations are typically initiated in Serbian.

Finally, the analysis arrived at the responses concerning the preservation and revitalization of the Rusyn language. All respondents unanimously agreed on the importance of transmitting the language to younger generations (100%). Nearly all participants indicated that maintaining or improving their own proficiency in Rusyn was important to them (77 out of 78 respondents, or 98.72%), and an identical share (98.72%) expressed the view that the Rusyn language should be retained in schools where it is currently taught and introduced in schools where it is not yet available.

Despite all the positive indicators suggesting that the Rusyn language is highly vital, only 4 out of 78 respondents (5.13%) believe that the vitality of the Rusyn language is stable. One respondent was unable to assess the language's vitality, while as many as 73 out of 78 respondents (93.59%) expressed a strong conviction that the Rusyn language is in decline.

Discussion

The results presented give rise to two central questions: (1) Why is the Rusyn language in decline, that is, what factors in practice override the respondents' positive attitudes toward its use? and (2) How can the striking uniformity in respondents' answers be explained?

In the present section, we will first address the extent to which language attitudes influence language behavior. We will then propose a possible explanation for the consistency observed in our respondents' answers. Finally, we will incorporate into the analysis the descriptive responses to the questions related to the survival and revitalization of the Rusyn language, in which participants elaborate on the importance of maintaining or learning the Rusyn language from a personal perspective and offer suggestions that could contribute to its revitalization (XIV Language maintenance and revitalisation: 5. Why is it important (to preserve/revitalise (or learn) your language)? 9. What do you think should be done to preserve or revitalise your language?).

In psychological research, correlation is tested by examining whether changes in one variable are accompanied by changes in another, and if so, the relationship—measured by a correlation coefficient (r) ranging from -1 to 1—is considered positive when both variables increase together, negative when one increases as the other decreases, and absent when no consistent pattern is observed (Kostić 2014: 13). The initial aim of our study was to examine potential correlations between variables related to language attitudes—specifically regarding language preservation and revitalization (XIV_4, XIV_6, XIV_7), speakers' emotional attachment to their language (XII_4, XII_5), and education (V_2,

V_5)—on the one hand, and variables related to language behavior—namely, domains of language use (III_1_1 through III_1_6) and intergenerational language transmission (II_5, II_6, II_7)—on the other. However, as evident from the results presented, the responses concerning language attitudes were almost entirely uniform (and overwhelmingly positive), which limited the possibility of establishing meaningful correlations between the two sets of variables.

An overview of theoretical approaches and research on attitudes in general is systematically presented in the work of Sanja Mikatić Subotić (2024; for further discussion and comparable findings on this topic, see, for instance Ajzen and Fishbein 1977, 2000; Guerin and Foster 1994; Ladegaard 2000; Paunović 2009). She informs us that attitudes can be understood from both behaviorist and mentalist perspectives. The behaviorist approach, according to the author, is criticized for overemphasizing the attitude–behavior relationship and for treating attitudes as mere behavioral reactions of individuals to social situations (this premise served as a starting point for our own research—indeed, the very disconnect between attitude and behavior inspired us to explore the issue further). In contrast, mentalists conceptualize attitudes as a tripartite structure consisting of affective (emotional), cognitive (intellectual), and behavioral components. The affective component refers to the emotional responses elicited by the attitude object (in our case, the Rusyn language); the cognitive component encompasses beliefs, knowledge, and perceptions regarding the object (this component appeared highly developed among our respondents); while the behavioral component implies actions directed toward the attitude object. For nearly a century, empirical studies have consistently demonstrated weak or negligible correlations between attitude predictors and behavioral criteria. These findings led many researchers to question the nature of the attitude–behavior relationship. The general consensus that emerged was that attitudes exert only a limited influence on behavior prediction. While this conclusion may appear surprising, it should not be. If attitudes or knowledge about a particular phenomenon were sufficient to modify behavior, none of us would engage in undesirable actions—ranging from severe forms such as substance abuse to more common habits like overeating or smoking (these being some of the most obvious examples). The author further notes that a more recent conclusion within this field is that attitudes represent only one of many factors influencing behavior. While this acknowledges the continued relevance of attitudes, it also underscores that attitudes alone are often not directly linked to behavioral outcomes.

Based on the quantitative data presented, one might even conclude that, in the case of the Rusyn community, the predictability of language behavior based on language attitudes is relatively high. However, we would like to offer several critical remarks that may help us avoid relying on such a one-dimensional interpretation. Following the direction proposed by Jelena Filipović (2018,

10), it is important to shift our analytical focus toward the concepts of cultural models and ideologies, as these fundamentally shape the attitudes, beliefs, perceptions, emotions, and responses of members of a speech community. Understanding the patterns of linguistic interaction thus provides a clearer insight into the structure of these cultural models and reveals the underlying ideology that informs speakers' perceptions of reality.

First and foremost, when examining responses related to language attitudes and personal feelings toward the language, a degree of stereotypicality is observed. By stereotypical responses, we refer to what some authors describe as attitudes and beliefs, or what Jelena Filipović terms ideology (Filipović 2018, 15; see also Bugarski 1996, 102). Filipović defines language ideology as "systemic, mental (and often implicit) structures that enable speakers to understand, apply, and/or modify the linguistic conventions of their sociocultural community" (Filipović 2018, 22; cf. Silverstein 1979 and Woolard and Schieffelin 1994). It is important, however, to distinguish between the concepts of attitudes and beliefs, which pertain to the individual (cf. prototype in Popović 2018, 63), and language ideologies and stereotypes, which are social constructs. If we follow Popović (2008, 63; see also Paunović Rodić 2019, 44), we may define stereotypical responses as those that reflect generalized, community-wide value systems shared by individuals as members of that community. What does this actually imply? For instance, if one asks a child whether they will behave well, the child will most likely respond affirmatively, because they know they are expected to do so. Similarly, when a member of a community is asked whether the preservation and revitalization of the Rusyn language is important to them, they are likely to respond affirmatively—not necessarily as an expression of actual behavior or commitment, but as a reflection of a learned, internalized, and affirming attitude toward their community, heritage, and language, which are all perceived as essential components of personal identity.

We would like to propose an additional possible explanation for the remarkable consistency observed in respondents' answers concerning language attitudes. The Rusyn community is relatively small and somewhat closed. Those who actively use the Rusyn language and participate in community life were more inclined to take part in our research, whereas it proved significantly more difficult to reach other potential respondents.[6] The reluctance of community members who do not possess sufficient proficiency in Rusyn (as self-assessed), who may have become distanced from the community, or whose life circumstances prevent them from using the language more frequently and effectively,

[6] This certainly represents a limitation of the presented research and has likely influenced the overall results; however, by consciously incorporating this fact into the interpretation of the data, it is possible to arrive at sound and reliable conclusions.

should not be interpreted solely as a lack of interest. It is highly likely—and we encountered such situations during fieldwork—that within the community, both proficiency in Rusyn and active involvement in communal life continue to carry a certain degree of prestige (see, for example, Bugarski 1996, 104–107). Consequently, individuals who, for various reasons, cannot claim fluency in the language or who are not involved in organizing cultural or socially beneficial events may feel excluded or unworthy of participation in the study, as they do not perceive themselves as sufficiently legitimate members of the community. As noted by Popović (2022), drawing on the functional perspective of sociolinguist John Edwards, it is essential to distinguish between the instrumental and sentimental functions of language—where the latter is primarily associated with the expression and preservation of ethnic identity (Edwards 1994, 128; cf. *cultural loyalty* vs. *language loyalty* in Edwards 1994, 112)—which, in the context of recessive linguistic varieties, often overshadow other functions. Among these members of the community, this sentimental attachment to the language may remain particularly strong.

A qualitative analysis of the descriptive responses to the questions within the section XIV Language maintenance and revitalisation: 5. Why is it important (to preserve/revitalise (or learn) your language)? 9. What do you think should be done to preserve or revitalise your language? may provide deeper insight into a possible answer to the question of why the Rusyn language is in decline—that is, what factors in practice undermine the respondents' otherwise positive attitudes toward its use, as perceived from the perspective of the respondents themselves. The responses to the first question (XIV_5: Why is it important (to preserve/revitalise (or learn) your language)?) reveal that the Rusyn language is regarded as an essential and inseparable part of the respondents' identity. Additionally, respondents often emphasize their attachment to the language as an expression of love and respect for their parents, ancestors, and cultural heritage. Responses to the second question (XIV_9: What do you think should be done to preserve or revitalise your language?) reflect a range of suggestions for community engagement—many of which are, in fact, already being implemented—such as introducing the language into school curricula, publishing books, and creating interactive, multimedia, and television content for children in Rusyn. However, the overwhelming majority of respondents point to (young) parents as the main agents of language loss, criticizing them for not speaking Rusyn with their children at home and for failing to enrol them in schools offering instruction in the Rusyn language.

If we set aside factors such as natural migration, broader societal conditions, and mixed marriages—elements of life that cannot or should not be externally regulated—we are left with the finding that nearly all respondents place responsibility on parents, who, in their view, do not devote sufficient attention

to transmitting the language to their children or tend to give up on this effort too easily. On the one hand, although a significant number of Rusyns live and work in Novi Sad, they are not concentrated in a single area but are instead dispersed throughout the city. As a result, in neighborhoods where the minimum number of pupils (typically five) required to offer the subject Rusyn Language with Elements of National Culture is not met, instruction is organized in more distant schools—creating additional logistical challenges for parents. On the other hand, in communities where complete primary and secondary education in the Rusyn language is available, parents increasingly choose to enrol their children in Serbian-language classes. Their rationale is to ensure that children from predominantly Rusyn-speaking environments acquire Serbian as early as possible—the language in which they will continue their formal education.

Concluding Remarks

This study, based on data collected through the *VLingS Questionnaire 1.0* during fieldwork among members of the Rusyn community in Serbia, analyzed both quantitative (descriptive statistics) and qualitative responses concerning language education, intergenerational transmission, domains of use, and attitudes toward language preservation and revitalization. The findings reveal a striking discrepancy between respondents' overwhelmingly positive attitudes toward the Rusyn language and the observable patterns of its use and transmission. Quantitative data demonstrate that respondents strongly affirm the importance of Rusyn as a marker of cultural identity and heritage, that they support its presence in schools, and that they value its intergenerational transmission. At the same time, however, the language shows reduced vitality in everyday domains beyond the family and church, and nearly all respondents acknowledge its decline. This gap can be explained by several factors. On the one hand, the consistency of positive responses may reflect learned, community-wide ideologies and stereotypes, in which affirming the value of Rusyn is tied to collective identity and cultural loyalty, rather than to individual language behavior. On the other hand, qualitative evidence points to practical obstacles—such as parental choices, urban dispersion, and logistical difficulties in accessing Rusyn-language education—that weaken intergenerational transmission. Thus, while sentimental attachment to Rusyn remains strong, instrumental use is increasingly limited, leaving the vitality of the language dependent less on attitudes in principle than on concrete, context-specific practices in daily life and education.

We would like to emphasize that the current state of Rusyn language vitality is by no means hopeless. The Rusyn community continues to foster a wide range of cultural and folkloric events, which remain well-attended and closely followed. Many young people and enthusiasts are actively involved in cultural

and artistic societies in Ruski Krstur, Kucura, Orahovo and other villages, where all interested individuals—children, youth, and the elderly—have the opportunity to engage in activities that promote Rusyn culture and language. Of particular importance is the Rusyn Cultural Center in Novi Sad, which, in addition to organized activities, brings together primarily a student population—both Rusyn and non-Rusyn—and introduces the Rusyn language and culture to a broader audience in an informal and accessible manner through social interaction. Although the Rusyn language is being lost among some speakers, as it ceases to serve as a means of communication even within the immediate environment due to various life circumstances (such as relocation or a change of surroundings for marriage, employment, etc.), in environments where it is still used spontaneously and naturally within the community and in family contexts, it continues to evolve like any modern language, enriching and adapting its forms across all linguistic levels, and thus remains a living and dynamic system (see e.g. Fejsa 2020).

However, we wish to express a note of caution: rigid or purist attitudes toward the "correct" or "proper" use of the Rusyn language—such as criticism directed at young speakers for using Anglicism or other externally influenced forms, or at young parents for making practical decisions that facilitate everyday life—may risk alienating certain members of the community. For this reason, we advocate for understanding and support rather than judgment and exclusion.

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Plague Epidemics and Sacrificial Offerings along the Danube: Two Case Studies (1769–1814)

Abstract: This paper investigates the relationship between plague epidemics, religious rituals, and community responses in the Diocese of Nikopol, Ottoman Bulgaria, from 1769 to 1814. Amid political and social instability, exacerbated by wars and brigandage, the region was struck by devastating plague outbreaks. Catholic missionaries sent to the Ottoman Balkans by the Congregation for the Propagation of the Faith (Propaganda Fide) documented how local communities sought protection from disease through traditional sacrificial rites, such as the *kurban*. These animal sacrifices, perceived by the missionaries as a superstitious practice, were performed by Catholics, Orthodox Christians, and Muslims alike. Through two case studies, this article highlights the friction between local religious practices and missionary efforts to maintain doctrinal purity, providing a deeper understanding of the challenges missionaries had to face in an attempt to enforce religious boundaries.

Keywords: Plague, sacrificial offerings, Ottoman Bulgaria, Catholic missionaries to the Ottoman Balkans, religious hybridizations.

Epidemics and Wars in the Diocese of Nikopol in Ottoman Bulgaria (18th Century)

At the end of the 18th century, the Ottoman Empire experienced a serious crisis, destined to be resolved, albeit temporarily, only in the second half of the following century, with the *Tanzimat* reforms. Armed conflicts with European powers – first and foremost the Russo–Turkish wars – and the emergence of centrifugal forces had progressively weakened the central authorities, to the advantage of local governors. In the eastern Balkans in particular, armed bands of local brigands (known as *kărdžali*)[1] and the personal militias of *pashas*, *beys*, and *ayans*, in perpetual conflict with each other, fueled endemic uncertainty.

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[1] The period from the second half of the 18th century to the first decades of the 19th century is known in Bulgarian historiography as *kărdžalijstvo* (кърджалийство). On

Alongside these circumstances, another element exacerbated an already difficult situation: periodic outbreaks of severe plague epidemics. The disease decimated the local population and contributed to the perpetuation of migratory flows, particularly from the region of Bulgaria towards Banat – or, less commonly, from Banat towards Bulgaria – but also towards Habsburg Hungary, where, at least, the different political and social conditions guaranteed greater security. Indeed, from the very beginning of Ottoman expansion in the Balkans (14th–15th centuries), the authorities had to cope with the recurring problem of epidemics, not limited to plague outbreaks.[2] Preventive measures such as quarantine, which already had a long tradition in Western Europe,[3] were officially introduced only in the 1830s as part of the *Tanzimat* reforms, even though, locally, individual governors, e.g., Ali Pasha Tepelena, could implement special restrictions on freedom of movement.

Escape as a response to epidemics, especially plague, is widely documented in early modern Ottoman society: in the second half of the 17th century, Paul Rycaut, the English ambassador to the Sublime Porte, observed that during plague epidemics, wealthy Turks left the city to seek refuge in the countryside, where they waited for the danger to pass. About a century later, the French historian Elias Habesci also noted that many Muslims had developed the habit of relocating to escape the plague, especially if they had the economic means to do so.[4] All this evidence, as previously observed, helps to deconstruct the historiographic paradigm that prevailed between the 1970s and 1980s, according to

this, see A. Yaycioglu, *Partners of the Empire: The Crisis of the Ottoman Order in the Age of Revolutions* (Stanford: Stanford University Press, 2016); S. Dimitrov, *Sultan Makhmud II i krayat na enicharite* (Sofia: Iztok–Zapad, 2015); V. Mutafchieva, *Kŭrdzhaliĭsko vreme* (Sofia: Izdatelstvo na BAN, 1993).

[2] See, for instance, N. Varlik, *Plague and Contagion in the Islamic Mediterranean* (York: Arc Humanities Press, 2017); B. Bulmuş, *Plague, Quarantines and Geopolitics in the Ottoman Empire* (Edinburgh: Edinburgh University Press, 2005).

[3] For more recent research on the management of epidemics in northern Italy, see M. P. Zanoboni, *La vita al tempo della peste: Misure restrittive, quarantena, crisi economica* (Milan: Jouvence, 2020); F. Piseri, "Governare la città, governare la peste: pratiche di isolamento e quarantena nel ducato di Milano attraverso le lettere di Ludovico il Moro (1467)", *Pandemos* 1 (2023), 1–5. For the case of Florence, see J. Henderson, *Florence under Siege: Surviving Plague in an Early Modern City* (New Haven–London: Yale University Press, 2019).

[4] Both accounts are reported in Y. Ayalon, "Religion and Ottoman Society's Responses to Epidemics". In *Plague and Contagion in the Islamic Mediterranean*, ed. N. Varlik (Croydon: Arc Humanities Press, 2017), 187.

which Ottoman society accepted – almost indiscriminately – plague epidemics with fatalism.[5]

Between the 18th and 19th centuries, in Ottoman Bulgaria, many abandoned villages and towns to seek refuge in monasteries, where the existence of camps for the infected is also documented.[6] Catholic families, who constituted a minority in the local religious landscape, were among them, as documented in letters and reports written by the missionaries responsible for their pastoral care. This article focuses on the testimony of priests and missionaries engaged in the Diocese of Nikopol, one of the two ecclesiastical districts, together with the Apostolic Vicariate of Sofia (archdiocese until 1758), into which Ottoman Bulgaria was divided from the 17th century.[7]

Appointed almost continuously until the early 19th century, the bishops of Nikopol resided in Bucharest from the previous century, as they also held the office of apostolic vicar of Wallachia. From the second half of the 18th century onward, the Sacred Congregation for the Propagation of the Faith (Congregatio de Propaganda Fide), established in 1622, predominantly assigned to the diocese the members of two religious orders: the Congregation of St. John the Baptist, established in 1755 by the Genoese priest Domenico Francesco Olivieri, and the Congregation of the Passion of Christ, founded in 1720 by St. Paul of the Cross (Francesco Paolo Danei).[8]

Between 1767 and 1769, Sebastiano Canepa of the Congregation of Saint John the Baptist, the men's branch of the Romites of Saint John the Baptist, headed the diocese. Together with his brothers Domenico Antola and Antonio Capurro, he attended to the pastoral needs of Nikopol's Catholic community. From 1781, during the pontificate of Pius VI, Propaganda sent the Passionist fathers Francesco Maria Ferreri and Giacomo Sperandio to Bulgaria under the supervision of Bishop Pavel Duvanlia. The first Passionist bishop, Francesco

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5 S. White, "Rethinking Disease in Ottoman History", *International Journal of Middle East Studies* 42, no. 4 (2010), 549–567.

6 N. Manolova-Nikolova, "Văzroždenska mikroistorija: Manastirăt 'Sv. Sv. Kirik i Julita' v Nišavskata eparhija prez XVII–XIX vek", *Balkanistichen Forum* n.d., 13, 253–270.

7 Tocănel, P. "Laboriosa organizzazione delle missioni in Bulgaria, Moldavia, Valacchia e Transilvania". In *Sacrae Congregationis de Propaganda Fide memoria rerum 350 anni al servizio delle missioni: 1622–1700*, ed. J. Metzler, vol. I/2, 239–274. Rome–Freiburg–Vienna: Herder, 1972.; see also in the same volume B. Pandžić, "L'opera della S. Congregazione per le popolazioni della Penisola Balcanica centrale", 292–315.

8 For its role and history see G. Pizzorusso, *Propaganda fide. I. La Congregazione pontificia e la giurisdizione sulle missioni* (Rome: Edizioni di Storia e Letteratura, 2022).

Maria Ferreri, was appointed in 1805, and the diocese was entrusted continuously to the Fathers of the Passion until the first half of the 20th century.[9]

Epidemics of Plague in Missionary Reports: Two Examples

The Battistini, as the members of the Congregation of St. John the Baptist were known, played a pivotal role in the missions in Ottoman Bulgaria in the second half of the 18th century: while Canepa served as the bishop of Nikopol, Giuseppe Roverano, a member of the Congregation, was the apostolic vicar of Sofia (1758–1767), where he actively worked to stamp out all forms of religious hybridizations widespread among his flock.[10]

Canepa died on 6 February 1769 surrounded by the spiritual comfort of one of his missionaries, Stefano Lupi, a Propaganda student from the town of Ruse in northern Bulgaria. In a strange twist of fate, during those very same days, the missionary Antonio Capurro also passed away, after a long period of illness.[11]

Therefore, Lupi, along with Antola, remained the only missionary serving the Catholics of no less than seven villages: Oreš, Belene, Petokladentsi, Butovo, Varnapolci, Lagane (in the missionary documents Lasciani or Lexani), and Ruse. Unsurprisingly, in May of the same year, he described to the Secretary of the Roman Congregation a situation that was tragic on a personal and social level:

> Once again, I come to bow to Your Eminence, kissing the hem of the purple, begging you unceasingly to give me advice *quid agendum*. Your Eminence shall know that this new year my house has suffered a great loss because of this turmoil, which occurred

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[9] On the Passionist missions in Bulgaria, see the writings of F. Giorgini, *I Passionisti nella Chiesa di Bulgaria e Valacchia (Romania)* (Rome: Curia Generale Passionisti, 1998), and especially I. Sofranov, ed. *La missione passionista di Bulgaria tra il 1789 e il 1825* (Rome: Curia Generale Passionisti, 1982); I. Sofranov, ed. *La Bulgaria negli scritti dei missionari passionisti fino al 1841* (Rome: Curia Generale Passionisti, 1985). More recently, the Passionist missionary Paolo Cortesi, parish priest at Belene in northern Bulgaria, published a collection of letters and sources produced by co-religionists between the second half of the 18th century and the first decade of the following century: P. Cortesi, *Lettere dai confini d'Europa. La Diocesi di Nicopoli ed il Vicariato di Valacchia durante gli episcopati di mons. Pavel Duvanlia e mons. Francesco M. Ferreri cp* (Belene: 2022).

[10] On Canepa and his missionary period in Bulgaria, see G. Parodi Domenichi, "Due vescovi liguri missionari e pastori in Bulgaria", *Rivista diocesana genovese* 4 (1991), 587–596, where the author traces the biographical and missionary work of Canepa and Ippolito Luigi Agosto, engaged in Bulgaria in the second half of the 19th century.

[11] This information is reported by Stefano Lupi in a letter to the Propaganda dated 8 March 1769 (Ruse), APF, *Bulgaria e Valacchia* 6, ff. 2r–3v.

> in these parts, for they have set fire to the square, and therefore almost all the square has been burnt [to the ground], […] and our shop has been burnt with two and a half bags of goods […] but the Lord God has also taken my Mother from me; So I am left with four sisters to be married, and in Ruse I have no one to whom I should marry them, since there are very few Christians, and the number of them is seven houses, and they are married, so I don't know what course of action to take, while I see that the times are very troubled and bad; and therefore I had written to the Sacred Congregation of Propaganda Fide, so that they would give me permission to go to Hungary and take my sisters to marry them. The Holy Congregation did not allow me to do that before, and I did not care as much, because my mother was alive, but now that she is dead, I do not know what to do.[12]

War, pestilence, thievery, and family issues[13] made it very difficult for Lupi to reach the villages under his pastoral care. Inevitably, this limitation resulted in an inability to supervise the devotional and social conduct of Bulgarian Catholics, inclined to observe interconfessional practices shared by the Orthodox and, in some cases, Muslims.

The administration of the local Catholic community in Ruse, where Lupi resided, was equally challenging. The village was home to Catholics of Paulician origin, as well as a group of Catholic merchants—some of the few to have returned to Bulgaria after the anti-Ottoman uprising of Chiprovtsi in 1688.[14] A serious lack of confessional discipline, interreligious marriages, and "superstitious" practices were the norm in a village that also saw clashes between the Ottoman troops and the army of Empress Catherine II.[15]

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[12] APF, S. C. *Bulgaria e Valacchia*, vol. 6, f. 9r, letter of 8 May 1769.

[13] In all of his heartfelt letters, Lupi continued to bear witness to the grave situation he faced in the villages of the diocese, where, he wrote in 1770, "li pericoli sono le [sic.] seguenti, Guerra, peste, Febre malignia, Fame, Fuoco, e ladri e queste sono sei flagelli che si trovano presentimente, e sono continui" (Letter from Stefano Lupi to Propaganda, Ruse, 25 August 1770, APF, *Bulgaria e Valacchia*, vol. 6, f. 85r).

[14] During the uprising, the community of the village of Chiprovtsi, near Sofia, had risen up in the hope—unfulfilled—that the neighboring Habsburg troops would intervene on their behalf. The uprising was ruthlessly put down, and the village, an important center of Bulgarian Catholic culture, lost much of its former importance. See B. Andreeva Cvetkova, "Les mouvements de resistance et de liberation des Bulgares dans le Nord–Est de la Bulgarie, en Thrace et en Macédoine pendant les années 80 et 90 du XVIIe siècle", *Palaeobulgarica / Starobalgaristika* 3 (1980), 45–56; A. Ciocîltan, "The identities of the Catholic communities in the 18th century Wallachia", *Revista Română de Studii Baltice şi Nordice* 9/1 (2017), 71–82.

[15] These conflicts were related to the Russo-Turkish War (1768–1774) fought between Empress Catherine and Sultans Mustafa III and Abdul Hamid I. See B. L. Davies, *The Russo-Turkish War, 1768–1774: Catherine II and the Ottoman Empire* (London: Bloomsbury, 2016).

Another difficulty, as Lupi lamented in a letter sent in November 1769, was the presence of a community of Armenian Catholics, who had left Bucharest a year earlier. As Lupi reports, this group refused to adopt the rules the missionary tried to enforce, continuing with its illicit behavior:

> For a year now, I have worked to bring them back them to the [right] path, and with some I have had some success; but others I have not been able to bring to the path at all, as they are imbued with unsound maxims, and therefore I do not know what to do with these people, because they are full of superstitions; and I see that they do not keep any faith; while they do not want to hear the admonitions, and they go to the Armenian schismatic churches, and observe the feasts of the schismatic Armenians, and their fasts, and during our feasts they work, and they eat meat at our fasts, and if they wish also on Saturday they eat meat and do not care to come to Holy Mass, as they prefer to go to eat the Kurban of the Armenians, rather than come to Mass, even though I urge them [to do so], and yell [at them] like an ox, that they should not go to eat this cursed [kurban].[16]

Rather than heed Lupi's instructions and follow Catholic rites and customs, the Armenians soon adapted to local customs and began to mix with the Orthodox Armenians, whose feasts, as Lupi reported, they observed instead of honoring their own confessional tradition. There were countless widespread and shared superstitions: first, Lupi mentioned the *kurban*, an animal sacrifice common to Catholics, Orthodox Christians, and Muslims in Ottoman Bulgaria. Writings produced by missionaries and bishops documented this ritual practice among their flock as early as the 17th century, but references became increasingly frequent and poignant during the 18th century. While Petar Bogdan Bakšev, Archbishop of Sofia (1642–1674), described the procedure and purpose without naming the ritual,[17] in 1680, Anton Stefanov, an observant Franciscan from the village of Chiprovtsi and bishop of Nikopol, identified the sacrifice as *kurban*, a Turkish term of Semitic origin (*qurbān* in Arabic, *korban* in Hebrew) denoting a sacrifice to which local Catholics also referred to as *žértva*, an indigenous Slavic word.[18]

In 1760, a circular from Propaganda Fide had forbidden its celebration, but as letters and reports from missionaries working in both dioceses testify, the

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[16] APF, *SC Bulgaria e Valacchia* 6, f. 86r–v.

[17] See P. Deodatus, *De antiquitate paterni soli et de rebus bulgaricis*, ed. and trans. T. Vasilev, vol. I (Sofia: 2020), 264.

[18] See the letter of the Bishop of Nikopol Anton Stefanov to the Cardinals of Propaganda and to Pope Innocent XI, "Report and Visit of the Bishop of Nikopol", Belene, 22 July 1680. In B. Primov, P. Sariĭski, M. Ĭovkov, S. Stanimirov, eds. *Dokumenti za katolicheskata deĭnost v Bŭlgariia prez XVII vek* (Sofia: Sv. Kliment Ohridski 1993), 454–455.

practice continued to be widespread.[19] The *kurban* was offered for the dead, but also for the fertility of fields and women, or for the health of family members and children. Sacrificial offerings could also be made in honor of the so-called *samodivi*, forest fairies of Slavic and Bulgarian folklore, believed to be able to deliver men and women from misfortunes and catastrophes.[20] Evidently, the Armenian Catholic community was receptive to this belief, further underscoring the ritual's interreligious and "pan-Balkan" nature. As often noted in the missionaries' letters, Bulgarian Catholics preferred to celebrate the ritual and then consume the flesh of the sacrificial animal rather than attend Sunday mass, as Domenico Antola and Niccolò Pugliesi, Canepa's predecessor and Archbishop of Ragusa from 1766, repeatedly reported to Propaganda Fide.[21] A similar tendency emerged even among the Catholic Armenians of Ruse.

But there was more: later in his letter, Lupi also highlighted the Armenians' disaffection with the Catholic sacraments, specifically denouncing the custom of celebrating weddings "as the schismatics do". The newlyweds did not consummate the marriage on their wedding night, but three days later, following the tradition of painting their hands and feet with the "color of Portogalo", that is, orange (in Bulgarian *портокал*, *portokal*).

However, relations between the missionary and the Armenian community soured due to a plague epidemic decimating the villagers. More specifically, the Armenians expected the missionary to visit the homes of women and men who had contracted the disease. Moreover, they wanted the priest and the penitent to be in close contact during confession, without taking any preventive measures. They did not even want communion to be distributed to them "with the scissors made and delivered by the most illustrious and most reverend Monsignor Nicolò Pugliesi, [now]", Archbishop of Ragusa," but wished to receive it directly from the hands of the missionary. It might be interesting to recall that

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[19] A printed copy of this instruction, published in *Collectanea S. Congregationis de Propaganda Fide*, no. 424, 271–276, is preserved in the Archives of the Dicastery for the Doctrine of the Faith (ADDF, S.O., St. D4 E, I).

[20] I would like mention two articles that I have dedicated to this topic and, more generally, to the specificities of Bulgarian Catholicism in the 18th century: S. Notarfonso, "Il rito del kurban tra i pauliciani bulgari: le fonti missionarie (secoli XVII–XVIII)", Storicamente.org – Laboratorio di Storia 18 (2022); S. Notarfonso, "Animal Sacrifice and 'Schismatic' Celebrations among Bulgarian Paulicians (Seventeenth–Eighteenth Centuries)". In *The Inquisition and the Christian East*, eds. C. Santus, J. P. Gay and L. Tatarenko (Durham: Durham University Press, 2025). About the transconfessional persistence of animal sacrifices in contemporary Bulgarian society see for instance B. Sikimić, P. Hristov, eds. *Kurban in the Balkans* (Belgrade: Institute for Balkan Studies SASA, 2007).

[21] See, for instance, Antola to Propaganda, 8 June 1765, APF, SC. *Bulgaria e Valacchia*, 5, f. 243rv.

the possibility of using similar tools for the distribution of the Holy Communion in times of plague had been officially introduced by Pope Benedict XIV in 1754 – barely 15 years earlier – in response to a *dubium* submitted to the Propaganda Fide and the Holy Office by the apostolic vicar of Algiers, Arnoult Bossu.[22] Until then, the host could only be given by hand: Catholic ministries were not permitted to alter the standardized rite of the Sacrament in any case so as not to compromise its sanctity. The reality, however, was different: despite the official prescription, many missionaries serving in territories devastated by plague epidemics already used tools when administering the Eucharist to avoid contagion.

As previously observed, in 1754, the use of a spoon in similar cases was finally permitted, although conceived by Pope Lambertini (Benedict XIV) as a last resort specifically intended to meet the needs of those who worked in dioceses suffering from a severe shortage of priests and missionaries, as was the case with Maghreb[23] or, in this case, Ottoman Bulgaria.

Evidently, the uncompromising bishop of Nikopol, Niccolò Pugliesi, immediately took advantage of the newly introduced papal concession, providing his missionaries with a set of scissors to distribute the Holy Host among their flock during the recurrent waves of plagues. Concerned for his own life and that of his relatives, Lupi wanted to make use of the tool but found himself forced to fulfill his flock's requests instead. However, by the time he wrote the discussed letter, the situation had further deteriorated. One of his servants had contracted the disease and died, while his sister, still ill, was on the mend. In Ruse, Lupi lamented, "one hundred and fifty die every day [...] and of our Ragusan and Armenian people eleven have died because of the plague so far, and I do not know what will happen next". In these new circumstances, he felt compelled to take a more cautious attitude. Once again, however, he had to wrangle with the obstinacy of the Armenian community.[24] "In addition," he wrote in his letter to Propaganda, they said that a "man should not fear the plague; if God has written that he must die, then die he will. Finally, they say the plague is a woman who walks, and some even swear they have seen her wandering at night." Determined not to take preventive measures, the Armenians expressed a fatalistic attitude toward the disease.

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[22] ADDF, SO, *Dubia circa Eucharistiam* 1603–1788, fasc. 35, [11 July] 1754, cc. 508–509.

[23] The case has been discussed by Mario Sanseverino: M. Sanseverino, "Dubia barbareschi. La necessità delle trasgressioni nelle missioni religiose delle Reggenze di Algeri, Tripoli e Tunisi (secoli XVII–XVIII)", *Rivista di Storia del Cristianesimo* 19, no. 2 (2022), 454–482.

[24] APF, SC *Bulgaria e Valacchia* 6, f. 86v.

Indeed, in the medieval and early modern Catholic tradition, pestilence and disease had long been theologically interpreted as divine punishment for human sins, while from a medical perspective, the plague was generally regarded as an infection caused by "bad air," a concept derived from the writings of Galen and Hippocrates.[25] Thus, in response to epidemics, medical treatments and preventive measures were increasingly integrated with, but did not replace, spiritual remedies such as devotional processions and prayers.

The belief that pestilence was somehow connected to human misbehavior and sin persisted into the first half of the 19th century, when a violent cholera epidemic swept across Europe. The then Father General of the Society of Jesus, Jan Philipp Roothaan (1783 or 1785–1853), who coordinated Jesuit assistance for those who contracted the disease, described cholera as a form of medicine meant to heal the souls of sinners, one that the Jesuits must withstand heroically.[26]

Even the idea that the plague roamed the city in the form of a woman – an image that occupied a central place within their belief system – was not confined to the Armenian community. According to the sources, as we shall see, it was also widespread across the region among multiple confessional groups. The evidence also indicates that the idea was by no means unfamiliar to Western and Central Europe. Perhaps one of the latest examples in this regard was the appearance of the plague as an old woman in the movie *Pest in Florence*, directed by Otto Rippert and written by Fritz Lang (1919), based on the short story *The Masque of the Red Death* by Edgar Allan Poe (1842). Yet the concept has much older roots. As early as the beginning of the 17th century, the idea appeared in Cesare Ripa's *Iconologia* (1603), where the author suggested that the plague should be depicted as a woman: old, emaciated, and terrifying, with sallow skin and disheveled hair. Her head was to be surrounded by a crown of dark clouds and her feet rested on the skins of lambs, sheep, and other animals,

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[25] For a summary, see Henderson, *Florence under Siege*, 136–141; and F. Borghero, "Religious Orders and Plague Epidemics in Late Medieval and Renaissance Florence". In *Religious Orders, Public Health and Epidemics. From the Black Death to Covid–19*, ed. F. Borghero (Münster: Aschendorff Verlag, 2024), 23–48.

[26] On the matter, E. Colombo, *Quando Dio chiama. I gesuiti e le missioni nelle Indie (1560–1960)* (Bologna: Il Mulino, 2023), 203–223; E. Colombo, "Mission at the Time of Cholera: Jesuits in 19th century Italy". In *Religious Orders, Public Health and Epidemics. From the Black Death to Covid–19*, ed. F. Borghero (Münster: Aschendorff Verlag, 2024), 169–187. About the Jesuits and epidemics, see also S. Isidori, "Le 'Indie' della peste: il contributo gesuita all'ampliamento semantico del concetto di 'martirio'", Storicamente. org – Laboratorio di Storia 18 (2022).

while she held in her hand a scourge with blood-stained cords.[27] Between the first and second halves of the 17th century, when several plague epidemics struck the Italian peninsula, artists and sculptors gave visual form to this idea. One of those artists, for instance, was the Flemish sculptor Giusto le Court, who, in 1670, depicted the plague as an old woman chased away by the Holy Virgin in Santa Maria della Salute, in Venice. The church itself, designed by Baldassare Longhena in 1631, was erected in the aftermath of a vow made by the Venetian Senate and dedicated to the Republic's protectress, the Virgin Mary, while the plague was raging in Venice.[28] A few years earlier, a similar solution had been adopted by Mattia Preti. In 1656, shortly after the end of a plague epidemic, the painter was commissioned to create seven votive frescoes above the city gates of Naples in which he represented the disease, once again, as an old woman covered in sores and rags.[29]

However, according to the available sources, the Bulgarian tradition displayed several distinctive features. An undated and unnumbered leaflet preserved in the Historical Archive of the Congregation of the Passion of Christ, presumably dating from the first half of the 19th century, offers additional insight:

> Old plague means here a deity in the guise of an old woman. These people imagine that diseases are being [sic] living and evil gods-spirits. The Bulgarians say that the plague is called "Baba Sciuma" [*Chuma, чума*], "Grandmother Plague," and that she is alive and can have children.[30]

The "pestiferous disease" could therefore take on the appearance of an old woman or that of a particularly attractive maiden. Through its embodiment, the plague made itself visible to human beings and could contact or interact with them. As in Poe's aforementioned short story, the plague was a woman capable of going through all physical obstacles and entering dwellings, nullifying any attempt at isolation.

In the early decades of the 19th century, new plague outbreaks struck Bulgaria and Wallachia, becoming unusually severe between 1813 and 1815. This

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[27] C. Ripa, *Iconologia overo descrittione di diverse imagini cauate dall'antichità, & di propria inuentione* (Rome: 1603), 397.

[28] Cf. A. Hopkins, "Plans and Planning for S. Maria della Salute, Venice", *The Art Bulletin* LXXIX, no. 3 (1997), 441–465; M. Clemente, *Il marmo bianco e la peste nera. White Marble and the Black Death* (Venice: Marsilio, 2019).

[29] Cf. A. Pasolini, "I santi della peste nei territori della Corona d'Aragona". In *Ospedali e assistenza nei territori della corona d'Aragona: fonti archivistiche, archeologiche e artistiche*, eds. M. Rapetti and A. Pergola (Perugia: Morlacchi, 2021), 149–170.

[30] The leaflet is preserved in the archival dossier pertaining to the episcopate of Fortunato Maria Ercolani (1815–1822): AGCP, Bulgaria, IV–3/4–3 (Bishop Fortunato Maria Ercolani), unnumbered page.

wave, which decimated entire villages, is known in Bulgarian historiography as *pŭrvata chuma* or *pŭrvata moriya* ("the first plague").[31] Even in this case, we have first-hand testimony from missionaries serving in the Diocese of Nikopol. The ecclesiastical structure of the diocese was significantly affected: Bishop Francesco Maria Ferreri (1805–1813) and the missionaries Raimondo di San Francesco Borgia (Mornia) and Father Pietro della Passione (Molinari), all belonging to the Passionist Congregation, lost their lives after contracting the disease. On 29 May 1814, Antonio Gabriele Severoli, apostolic nuncio to Vienna and bishop of Viterbo, reported that "Bulgaria and Wallachia are [left] without bishops and missionaries, taken away by the plague".[32]

News of their deaths is also provided by Ferreri's successor, Fortunato Ercolani, in a report addressed to Father General Tommaso Albesano.[33] In the report (1815), Ercolani also said that a part of the Catholic community from the Diocese of Nikopol had left their hometown, seeking refuge beyond the Danube, in an attempt to evade the "pestiferous disease" and the bandits that ravaged the Bulgarian countryside. In fact, as early as 1806, in a letter to Propaganda Ferreri himself reported that a number of families, among others, had relocated to a village called Slobozia, just opposite the town of Ruse,[34] by order of the governor of Ruse, who wanted them to cultivate the fields and vineyards he owned on the other side of the river.[35]

In the new settlement, Ercolani swore, they continually showed moral, devotional, and doctrinal integrity.[36] "But the devil", he lamented, "jealous of so much good, sought not only to enervate the most fervent Catholics, but also to

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[31] N. Manolova–Nikolova, *Chumavite vremena (1700–1850)* (Sofia: IF–94, 2004), 72–73.

[32] "La Bulgaria e la Valacchia sono privi di Vescovi, e di Operaj tolti dalla peste", Severoli to Propaganda, 29 may 1814, Vienna, APF. S.C. Bulgaria e Valacchia 8, f.300r.

[33] AGCP, *Bulgaria*, IV–3/4–3 (Bishop Fortunato Maria Ercolani), ff.1–2.

[34] This is probably the village of the same name, today located in the Giurgiu district of Romania.

[35] "[…] altri per […] ordine del Governatore di Ruciuch furono trasportati a Slobosia villaggio incontro a Ruciuch in cui egli hà una gran tenuta, affinché lavorino i suoi campi e vigne". In the same report, Ferreri informed the Propaganda that the Passionist father Bonaventura Paolini had been permanently sent to the village to serve the spiritual needs of the newborn community. APF, S.C. Bulgaria e Valacchia 8, f. 175r, *Relazione della visita della Diocesi nicopolitana in Bulgaria fatta l'anno 1806 nei mesi di maggio e giugno da me Francesco per gratia di Dio e della Santa Sede Vescovo di Nicopoli.*

[36] "When our people fled from the Gargelli, they had formed a village near the town of Rosciuk on the bank of the Danube, on this side towards Wallachia; the Catholics of this village were so good to me that it seemed to be a little garden of paradise, and it was my great pleasure to visit them often," AGCP, *Fondo Bulgaria* IV–3/4–3 (Bishop Fortunato Maria Ercolani), f. 5.

pull them into the schism". As they had done in their parish of origin and indeed throughout all the European provinces of the Ottoman Empire, the Catholic community lived alongside an Orthodox majority. Specifically, around 200 Orthodox families lived in Slobozia. The document does not specify the number of Catholics, but we can assume it must have been smaller: the letter Bishop Ferreri sent to the Propaganda in 1806 documented the presence of barely 40 families, 223 persons in total, 76 of which had received the sacrament of confirmation.[37] A single road separated the "schismatics" from the Catholic flock. The risk of *communicatio in sacris* and forms of confessional and ritual hybridization remained just around the corner: it was the aggressive plague sweeping through the region that sped things up.

An elderly Orthodox man, whom the bishop described as "obsessed with the devil", started wandering around the village, "shouting that he had a great thing to manifest in the name of the old plague". The man entered his "schismatic" church and, although he had never been able to read, he started reading books; he stuck knives inside his mouth without injury, and he performed other prodigious deeds, claiming that these were signs through which God wanted to show the community that he was speaking through the old man.

The elder's fame, unsurprisingly, quickly spread to the surrounding villages. Many came to see him and question him about those unusual incidents. As we read in the report, to those who asked why he was preaching like that and what the origin of those miraculous abilities was, the man replied that he had encountered nothing less than the plague itself. "[...] One night while he was sleeping, he heard a knock at the door, and, asking who it was, he heard a voice saying: Open up". Intimidated, especially by the late hour, the man refused to open the door "[...] but while the door was closed, a beautiful woman entered the house and said, 'Do you know who I am?' The terrified old man replied that he did not; she then said: I am the plague, who goes around everywhere exterminating people".[38]

As in the case documented by Lupi, the belief that the plague could take the form of a woman evidently spread on the other side of the Danube. However, other elements also emerge from Ercolani's account, which is notable for the high quality of its prose. After forcibly receiving the plague in his home, the old man listened to its precise requests:

> You shall go and tell all the priests and people around you that they shall gather in such a place, on such a day, and make me a solemn sacrifice. The people and priests

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[37] *Relazione della visita della Diocesi nicopolitana in Bulgaria fatta l'anno 1806 nei mesi di maggio e giugno da me Francesco per gratia di Dio e della Santa Sede Vescovo di Nicopoli*, APF, S.C. Bulgaria e Valacchia 8, f. 176v.

[38] AGCP, Bulgaria, IV–3/4–3 (Bishop Fortunato Maria Ercolani), f. 6.

> shall come well-dressed, each bringing food and flatbread dipped in honey, and after the sacrifice, they shall dine. The old man then said: Are there any Catholics here, and shall I call them again? Call them and invite them, but I fear that they will not come; the old man repeated: Who will believe me? She answered that she would invisibly prove her work, but he would go, do wonders, read, write, etc., and so on. Then, on the day of the sacrifice, she would make three fires of different colors appear in the sky, and she commanded him to order everyone that on the day of the sacrifice no one should order anyone to light a fire in his own house, and whoever would attempt this, she would immediately exterminate him with his whole family, and instigate the fire. So did the old man, and all the people in Slobozia, the name of that village, with a number of schismatic priests.[39]

Thus, to avoid contagion, the community had to collectively sacrifice an animal following the woman's instructions; the bishop does not explicitly use this term, but it could be called a *kurban*. The elder visited by the personification of the plague was Orthodox, but Catholic families were also explicitly called upon to participate, although the woman herself did not really consider their participation in the rite plausible. In addition to the animal sacrifice itself, the preparation of food was required, specifically, the flatbread soaked in honey to be consumed after the ritual. Three fires would appear in the sky at the time of the sacrifice, a miracle that would certify the truthfulness of the elder's words: the woman forbade the lighting of any more fires at the same time.

This was a series of preventive measures, which could be described as magical-ritual, also widespread in other villages in northern Bulgaria between the 18th and 19th centuries: the existence of an interdenominational ritual (open to participation by the Orthodox, Catholics, and Muslims) is also documented in the village of "Tarnicevizza (Tranchovitsa)" in the Diocese of Nikopol. Here, too, a collective sacrifice was offered to the so-called plague goddess, and, just like in Slobozia, lighting fires was forbidden on the day of the ceremony. At the end of the ritual, as in the case reported by Ercolani, the consumption of flatbread topped with honey was planned.[40]

The prelate, who at that time resided in the Bulgarian village of Belene, did not know what was happening on the other side of the Danube. Having arrived by chance in Slobozia on the day of the sacrifice, while he was resting, tired from the journey, he was alerted to the fact by a man called "Dedo Stagno". Initially skeptical, after an initial reconnaissance, Ercolani ascertained that no Catholic, not even his host family, had dared to light a fire, in compliance with the orders given to the elderly "schismatic" by the Old Plague. He immediately took steps to counter what he considered an illicit form of collective superstition.

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[39] AGCP, Bulgaria, IV–3/4–3 (Bishop Fortunato Maria Ercolani), f. 6.

[40] As reported in N. Manolova–Nikolova, *Chumavite vremena (1700–1850)*,158.

He ordered the fireplace in the room to be lit, and the bread and other food prepared for the gathering to be thrown away. Together with his companion, Father Bonaventura, he headed for the place designated for the sacrifice, about a mile away from their home. To corroborate their position and discredit the lies of the old man, the two adopted a singular but effective expedient: "We, the priests, had the stole and the Roman Ritual under our robes, and in defiance of the superstitious ceremony, we kept our pipes lit in our mouths, which everyone was surprised about, given the prohibition of lighting a fire".[41]

Upon arriving at the site, Ercolani found before him a diverse group: the families had brought their children to the gathering, on the ground they had laid out the tablecloths with the food for the ceremony, and the "schismatic" priests, simplistically accused of complicity, were reading aloud from their books. The carts with which the people had come to the square were arranged in a circle around the crowd, shaping a kind of protective wall around them. When everything was ready for the ceremony, the Orthodox priests sent for the elderly man who lived in a house not too far away. Invited to join the group, the man surprisingly refused.

The crowd, Ercolani points out, had not eaten yet: just as in Tranchovitsa, fasting before the ritual sacrifice was planned. Surprised and annoyed by the hunger and the bad weather – a wind that was at first mild but gradually became more and more violent – the villagers sent more men to his house. The last six returned shocked by what they had seen: "Oimé! Oimé!" they cried, "what have we seen, the poor old man is clubbed, dragged, tossed by an invisible force hither and thither about the room".

Dismay was soon followed by indecision: the "schismatic" priests did not know what to do. Some proposed to eat, others to wait, generating great confusion among the bystanders and derision in the "Turks" passing by. The Catholics, previously worried, now observed the scene, amused.

Because of the bad weather, the impatience of the hungry children, but also because of the doubts of the Orthodox priests themselves – some were beginning to accuse the old man of madness – the crowd finally dispersed, throwing away the "damned food, bread, and wine" (as Ercolani describes them) brought for the ritual. "We were still soaked", Ercolani reports, "but the water seemed to us roses falling from the sky for the joy we had of seeing the diabolical fraud dispelled before our own eyes".

The danger was thus averted, the lie revealed, the superstitions of the "schismatics" manifestly discredited. The same evening, we read, the Catholic

[41] AGCP, Bulgaria, IV–3/4–3 (Bishop Fortunato Maria Ercolani), f. 6.

community gathered to hear the bishop's sermon, and the "people [...] with great fervor praised and glorified our Holy Religion".[42]

Ever since their arrival in Ottoman Bulgaria (1595), missionaries sent by the Holy See had realized the level of serious confessional indiscipline that characterized Bulgarian Catholics.[43] Due to the presence of Orthodox Christians and Muslims, with whom they lived in close contact and sometimes shared worship spaces, they had developed customs, devotional practices, and, in some cases, even theological convictions that were hybridized and therefore seen as intrinsically flawed by the agents of the Holy See. Missionaries' attempts at solidifying confessional boundaries often met with stubborn resistance from local Catholics.

Especially after the uprising of 1688, the condition of Bulgarian Catholicism further deteriorated: the Catholic community of Chiprovtsi was decimated, while the Venetian and Ragusan merchants left the area. The Paulicians, whose very recent conversion to Catholicism (the process had begun at the beginning of the 17th century) had not eliminated many of the traditional practices and beliefs they had inherited from their ancestors, remained the main representatives of the Roman faith in the region.

Between the second half of the 18th century and the first half of the following century, as we have seen, other sources of instability contributed to further jeopardizing the missionaries' few achievements. The internal political situation within the Ottoman Empire, as well as wars and epidemics, hindered the actions of the missionaries, who were often no longer even equipped with the *firmans* that, until a few decades earlier, had allowed them to move more or less easily within the Ottoman territories.[44]

The case studies examined here are particularly eloquent in this regard. On the one hand, Lupi's experience in Ruse highlights the limitations of the missionary's attempts: the Armenian community, while seeking contact with the priest and his services (they insistently asked for the administration of the Eucharist), expected the sacraments to be administered on their terms and ended up adhering more to the internal logic of their own community than to Lupi's exhortations. Ercolani's report similarly reveals the persistent adherence within the relocated Catholic community to a system of beliefs and magical-ritualistic

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[42] AGCP, Bulgaria, IV–3/4–3 (Bishop Fortunato Maria Ercolani), f. 6.

[43] See the letters and reports published in E. Fermendžin, *Acta Bulgariae ecclesiastica ab a. 1565 usque ad a. 1799* (Zagreb: 1887) and in the abovementioned B. Primov, P. Sariĭski, M. Ĭovkov, S. Stanimirov, eds. *Dokumenti za katolicheskata deĭnost v Bŭlgariia prez XVII vek*.

[44] Cf. for instance Matteo Massarek (Archbishop of Skopje) to Propaganda Fide, APF, SC Servia 3 (1785–1839), f. 242r.

practices for the prevention of illness shared by the Orthodox. In fact, as scholars observe, the Orthodox Church itself sought to offer an alternative to this system, for example by promoting the cult of St. Haralampius, who in Bulgarian iconography is often depicted trampling the personification of the plague.[45]

Across early modern Europe, Catholics commonly prayed to God or to saints usually invoked against pestilence, such as St. Vincent Ferrer, St. Sebastian, or St. Roch, seeking their intercession and protection against the plague at the public and private levels. In 17th-century Florence, St. Antonino, to whom a public procession attended by political and ecclesiastical authorities was dedicated, was believed to have mitigated the effect of the plague in the city.[46] In the latter half of the century, this devotional theme found monumental expression in the work of Johann Bernhard Fischer von Erlach, Ludovico Ottavio Burnacini, and the sculptor Paul Strudel, who collaborated on the famous *Plague Column* (*Pestsäule*) in Vienna. The monument depicts the Holy Trinity triumphing over the allegory of the dying plague. Similar stylistic and iconographic motifs appeared in other cities of the Habsburg Empire, such as Kremnica (1765–1772),[47] but also Klausenburg/Cluj-Napoca (1738–1742),[48] where a statue of the Virgin crowns the top of the column. In fact, such monuments are closely connected to the Marian columns that spread throughout Central Europe between the 16th and 17th centuries, serving as instruments of re-Catholicization and often bearing a pronounced anti-Ottoman connotation.[49] The Viennese *Pestsäule* was commissioned by Leopold I as a double offering to God, both for the end of the plague and for another victory over the Ottomans in 1683.[50]

In the episode that occurred in Slobozia, at least according to Ercolani's testimony, the devotional measures taken against the disease followed a com-

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[45] See for instance Kristiyan Kovachev, "Mezhdu grekha i nakazanieto: obrazŭt na chumata v tsŭrkovnoto izkustvo i vŭv folklora" [Between Transgression and Punishment: The Image of the Plague in Christian Art and Folklore], Bŭlgarska etnologiya 4 (2021), 524–536. Other saints associated with protection against plague are, for instance, Sts. Menas, Anthony and Athanasius as reported in R. Popov, "The Cult for St. Athanasius among the Bulgarians", *Ethologia Bulgarica*, 1 (1998), 21–30.

[46] Henderson, *Florence under Siege*, 156–161.

[47] Cf. B. Balážová, "Stíp Najsvätejšej Trojice v Kremnici (1765–1772). Jeden z posledných morových stípov v bývalých habsburských krajinách", *ARS* 35 (2002),1–3.

[48] Cf. M. Bogade, "Marian Columns in Central Europe as Media of Post-Tridentine Policy of Recatholisation", *Ikon* 10 (2017), 329–336.

[49] U. Szulakowska, *The Alchemical Virgin Mary in the Religious and Political Context of the Renaissance* (Newcastle upon Tyne: Cambridge Scholars Publishing, 2017).

[50] C. Boekl, "Vienna's Pestsaule: The Analysis of a Seicento Plague Monument", *Wiener Jahrbuch für Kunstgeschichte* 49, no. 1 (2019), 41–56.

pletely different path: Catholics, along with the Orthodox majority, addressed the plague itself, offering "her" a sacrificial ceremony led by an old man who was not even a priest. In breach of the post-Tridentine tradition, this practice further blurred the boundaries between the two confessional groups. The episode sheds light, above all, on a tenacious attachment to local traditions and ritual forms, so pronounced that it necessitated Ercolani's immediate intervention. Even though, according to his own account, a series of (un)fortunate events ultimately prevented the sacrifice from being performed, the case shows that the rules missionaries had been attempting to enforce on behalf of the Holy See for the previous two centuries were still far from being fully implemented.

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The Family of Dr. Vladan Đorđević: Cultural Transfers in 19th- and 20th-Century Belgrade

Abstract: Dr. Vladan Đ. Đorđević was born in Belgrade in 1844 and died in Baden, Austria in 1930. He was a surgeon, scientist, writer, Colonel-in-Chief of the Royal Army Medical Corps, Prime Minister of the Kingdom of Serbia (President of the Council of Ministers), and Minister of Foreign Affairs from 1897 to 1900. Vladan Đorđević's real name was, in fact, Hippocrates, and his family name was Jimo or Čuleka. Not all Tsintsars and Greeks changed their names. Vladan Đorđević's mother's family has kept its original surname, Leko, to this day. His mother, Maria Đorđević, née Leko, was born in Bela Crkva in Banat, then part of the Habsburg Monarchy. Vladan Đorđević's father, Đorđe Đorđević alias Georgije D. Georgijević, was in the medical service of the army of the Principality of Serbia (later becoming a medical lieutenant). Vladan Đorđević's father and mother actually came from the same region of the Balkans, and their families left their ancestral homes and went north for the same reasons. Đorđe Đorđević was born in the predominantly Aromanian village of Fourka in present-day Greece. Vladan Đorđević's maternal grandfather, Marko Leko, was born in Vlachokleisoura, today Kleisoura in the Greek municipality of Kastoria. Migration to the northern areas of Southeast Europe was gradual. Merchants from the Ottoman Empire used to travel to and live in the Habsburg Empire for business purposes. Final departures from the old country were caused by the violence of the local semi-independent pashas. The most notorious was Ali Pasha of Ioannina. As is well known, the Tsintsars, like the Greeks, considered the Orthodox Church based in Constantinople and Byzantine culture to be their heritage. Apart from the businesses they ran, they had their own churches and schools (the Greek quarter in Vienna). They could start schooling in Greek in Belgrade, continue in Zemun, move on to Buda, and finish it in Vienna or Trieste. Business and cultural networks spread from Western European cities to Vienna, Buda, Pest, Constantinople, Odessa, and the country of the Khazars. Vladan Đorđević was not the only high-ranking official of the Kingdom of Serbia who was not of Serbian ethnic parentage. As in other European countries of that time, citizens of the Kingdom of Serbia of German or Jewish ethnic origin could also reach the highest positions. They were, of course, completely integrated into the framework of Serbian state politics and society.

Keywords: Vladan Đorđević, Cultural Transfers, Belgrade, Aromanians (Tsintsars), Greek culture.

Dr. Vladan Đorđević was born in Belgrade in 1844 and died at Dr. Lakatos Sanatorium in Baden bei Wien, Austria in 1930. He was a medical doc-

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tor, surgical specialist, scientist, writer, Colonel-in-Chief of the Royal Army Medical Corps, Prime Minister of the Kingdom of Serbia (President of the Council of Ministers), and Minister of Foreign Affairs from 1897 to 1900.[1] He resigned as Prime Minister because of King Alexander's engagement to Draga Mašin, a former lady-in-waiting to the Queen Mother Natalie (Natalija) in 1900.[2] Previously, he served as the Minister of Education and Religious Affairs and acting Minister of National Economy (1888–1889), Mayor of Belgrade (1884–1885), Minister Plenipotentiary in Athens (1891) and Constantinople (1894), personal physician of Milan Obrenović, Prince (1868–1882) and later King (1882–1889) of Serbia, Chief of the Medical Department of the Ministry of the Interior, Chief of the Medical Staff of the South Morava Division and the Morava-Timok Army (1876), and Chief of the Supreme Command Medical Corps in the Serbian–Ottoman Wars (1876–1878) and the Serbian–Bulgarian War (1885). He was the initiator and founder of the Serbian Medical Society, the Serbian Society for Private Assistance to Wounded and Sick Soldiers (Serbian Red Cross Society), and the First Belgrade Society for Gymnastics and Fencing. He launched and edited the first medical journals in Serbia and initiated and edited the renowned literary and scientific journal *Otadžbina* (*Fatherland*) from 1875 to 1892. Đorđević's bibliography is extremely extensive and covers a very long period (1858–1930), with 573 bibliographic entries that could be divided into literary works, articles, and reviews; publications in medicine and papers on natural and medical sciences; publications and articles on politics, economy, education, historiography, military science; polemics and published letters, memoirs, Đorđević's translations and translations of his papers into foreign languages.[3] Đorđević was a full member of the Serbian Learned Society (1869), the Medical Society in Vienna (1870), and the

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[1] Vladan Đorđević served as Prime Minister during the autocratic regime of King Alexander. He did not make the most important decisions, but he bore the brunt of the regime's unpopularity, and his name even led to the pejorative term for the entire regime – *vladanovština*. *Vladanovština* is a play on words, meaning "the bed rule of Vladan (from *ruler*, in Serbian "vladar"). A detailed biography of Vladan Đorđević can be found in: *Vladan Đorđević: Life, Work, Times*, ed. Radoje Čolović, trans. Jelena Mitrić and Tatjana Ružin Ivanović (Belgrade: SASA, 2020); J. Jovanović Simić, *Vladan Đorđević: a portrait of a tireless begetter*, trans. Katarina Spasić (Belgrade: SASA: Museum of Science and Technology, 2020). I would like to thank Jelena Jovanović Simić for making the documents and photos in the Museum of Science and Technology available to me.

[2] S. Jovanović, *Vlada Aleksandra Obrenovića* 2 (Belgrade: BIGZ, Jugoslavijapublik, SKZ, 1990); S. Rajić, *Vladan Đorđević, biografija pouzdanog obrenovićevca* (Belgrade: ZUNS, 2007).

[3] G. Lazarević, "Selective Bibliography of the Academician Vladan Đorđević's Works". In *Vladan Đorđević: Life, Work, Times*, ed. R. Čolović (Belgrade: SASA, 2020), 303–386.

Anthropological Society in Vienna (1871), a member of the French Society of Hygiene in Paris (1881), a corresponding member of the Spanish Society of Hygiene in Madrid (1883), and the Society for Public Medicine in Brussels (1885), as well as a full member of the Serbian Royal Academy (1893). Vladan Đorđević was the first to be granted an honorary degree of Doctor of Medicine from the University of Belgrade (1926).[4] Before he died at 86, Đorđević spent around 35 years out of the country (in Sarajevo, Vienna, Frankfurt am Main, Constantinople, and Athens), staying the longest in Vienna (for educational, political, and private reasons).

Vladan Đorđević's schooling began at the Greek school in Belgrade, which, like the Serbian school, was next to the Belgrade Cathedral. After his father left the army and decided to open a private European-style pharmacy with his brother Nikola, they moved to Sarajevo, where Đorđević continued his education at a Serbian school.[5] His teacher in Sarajevo was a young, enthusiastic Serbian intellectual called Aleksandar Šuškalović, who tried to imbue his pupils with the spirit of patriotism. In 1856, the family returned to Belgrade, where Đorđević's father got his old job and an apartment at the Military Hospital. Vladan Đorđević graduated from the Belgrade High School in 1862 and enrolled in the Law Department of the Belgrade Lyceum, but soon devoted himself to the natural sciences. Đorđević was granted a state scholarship to study medicine, and in the fall of 1863, he enrolled at the Medical University of Vienna. His professors were the greatest authorities in medicine at the time (Josef Hyrtl, Ernst Wilhelm Ritter von Brücke, Joseph Ritter von Škoda, Carl Freiherr von Rokitansky, and others). In 1869, Đorđević received three degrees – Doctor of Medicine, Doctor of Surgery, and Master of Obstetrics (he passed the examen rigorosum on June 11, 1869). Then he passed the entrance exam and got a job as an "assistant physician" to Theodor Billroths at the Surgical Clinic in Vienna. With the consent of the Serbian government, Đorđević accepted Billroth's offer and spent three months working as a doctor in the Prussian medical corps during the Franco-Prussian War (1870–1871). After his service in the Prussian army, he completed specialist studies and, in 1871, received the diploma of

[4] Vladan Đorđević was awarded the highest Serbian honors: Order of Miloš the Great of the 2nd Class, Order of the Cross of Takovo of the 1st Class, Order of Saint Sava of the 1st Class, Order of the White Eagle of the 3rd, 4th and 5th Classes etc. He was awarded numerous foreign honors: Imperial Austrian Order of Franz Joseph – Commander's Cross, Imperial Austrian Order of the Iron Crown of the 2nd Class, Imperial Russian Order of St. Saint Anne with Swords of the 2nd Class, Imperial Ottoman Order of the Medjidie of the 1st Class, Imperial Ottoman Order of Osmanieh (Osmaniye) of the 1st Class, and others. For the complete list of Vladan Đorđević's honors and medals, see J. Jovanović Simić, *Vladan Đorđević*, 246–247.

[5] Jovanović Simić, *Vladan Đorđević*, 21.

"operator" (surgeon). In Vienna, he met his future wife, Paulina Bittner. At that time, surgery was on the rise, and surgeons were in demand. He liked Vienna a lot. However, no preserved historical sources suggest that he considered making his stay in Vienna or any German city permanent. During his studies, he was a member of the Serbian student society "Zora" in Vienna and one of the initiators of the United Serbian Youth (1866), a liberal-patriotic organization. At first, he was very active in those organizations. He participated in the Pan-Slavic Convention in Moscow in 1867 and gave a speech on the emancipation of women at the Assembly of the United Serbian Youth in Belgrade. When the United Serbian Youth increasingly began to espouse socialist and revolutionary ideas, Đorđević gradually distanced himself from its work. He had been very religious in childhood but, influenced by the achievements of the natural sciences, he became very critical of religion. Reflecting the Zeitgeist and the inclinations of his generation, he became a republican, liberal, leftist, and nationalist, like most members of the United Serbian Youth. However, he later changed his political views and became a close and loyal associate of King Milan.

Milan Jovanović Stoimirović recorded an anecdote about the wedding of Vladan Đorđević in the Cathedral Church in Belgrade: "When he was getting married, the priest said: 'The servant of God Hippocrates is betrothed' – by which he made it clear that the Church did not recognize his metamorphosis and his pen name *Vladan*, and laughter broke out in the Cathedral".[6] Namely, in the Serbian national-romantic spirit of his generation, Vladan Đorđević changed his name from the Greek Hippocrates (Ἱπποκράτης) to Vladan. Vladan was, in fact, a calque of the second half of his Greek name. The name Hippocrates comes from the word ἵππος (horse) and the suffix κρατία (rule, *vladavina* in Serbian). The Serbs have many names common to all European peoples, originating from Greek, Hebrew, or Latin, but the name of the famous Ancient Greek "Father of Medicine" sounded strange and unusual, even funny. At that time, many well-known Serbian intellectuals changed their names. The full given name of Vladan Đorđević was Hippocrates Gymas or Gymo (Jymo) Chuleka (Džimo Čuleka). He was born on November 21 O.S. (3 December) 1844 in Belgrade, where his family lived. His mother, Marija Leko, was born in the town of Bela Crkva in the Habsburg Monarchy's Banat Military Frontier, now in Serbia. His father, Đorđe (George) Đorđević (also Georgios D. Georgijević), was a Serbian Medical Corps Lieutenant. Both of his parents were of Tsintsar (Aromanian, Vlach) descent. Their families came from the same region of the central Balkans. In Serbia, the Aromanians from the central Balkans are almost exclusively called

[6] M. Jovanović-Stojimirović, *Siluete starog Beograda* (Belgrade: Prosveta, 2008), 335.

Tsintsars. The term *Vlach* was reserved for the inhabitants of Eastern Serbia (like in Vladan Đorđević's writings) and the inhabitants of Wallachia.[7]

Vladan Đorđević's father Đorđe (George, Georgios, Γεώργιος) was born in 1812 in the predominantly Aromanian village of Fourka (Φούρκα) in what is now the Ioannina regional unit in Epirus, Greece. His father, Demetrios (Δημήτριος, ca.1780–1843), had a trade network that reached as far as Vienna. Their family name was Gima (Gymas) or Gymo (Jymo) Chuleka.[8] Čuleka (Chuleka) was the nickname of Vladan Đorđević's great-grandfather, priest Fr. Eftimios (Ευθύμιος), which, according to Đorđević, means "well-dressed and proud".[9] The various dialects of Aromanian include different variants of this word (*čiuleka/čilika/čileki*), and the original meaning is "steel" (*çelik* in Turkish, *čelik* in Serbian, *çeliku* in Albanian). By semantic extension, it can mean "proud, strong". There is a saying "sanatos ca čileki" (healthy as steel).[10]

Fr. Eftimios' father's name was probably George (Đorđe). This could be why Đorđe Đorđević took the Serbian surname Đorđević (descendant of Đorđe/George). Vladan Đorđević's maternal grandfather, Marko Leko (Μάρκος, Marcus, Mark, Marc), was born in the well-known Aromanian center of Vlachokleisoura (Βλαχοκλεισούρα), today Kleisoura (Κλεισούρα) in the Greek municipality of Kastoria.[11] The Leko family left their ancestral home in the last quarter of the

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[7] There are other historical meanings of the term *Vlach* in the Serbian language.

[8] HAB, Collection of Church Registers, Church Register of Births of the Cathedral Church (1842–1847), vol. 5, 197, reg. no. 252.

[9] "My father and the teacher [Šuškalović] sat down, and the teacher took my hand and asked: – Please tell me your name and your surname. – My name is Hippocrates Đorđević Čuleka! […] Čuleka is certainly a nickname, just as my grandfather was called 'Šuškalo', and now my last name is Šuškalović. - Yes, that's our nickname from the old days. That's what they called my great-grandfather, because he was handsome and proud. – As far as I know Greek – said Daskal [from Greek: διδασκαλία] – the word 'čuleka' in that language means neither one nor the other. – It is not Greek, but Albanian, because we are from the southern border of Arnautluk [from Turkish: Arnavudluk]! – Oh right! Then we will make Čuleka Čulekić, like Šuškal became Šuškalović? – Jok [no, nope, from Turksih: yok], write down Đorđević, my [Đorđe Đorđević's] name is after my [great] grandfather. And then he [Šuškalović] reached for a kind of large notebook and wrote in it: Hippocrates Đorđević from Biograd [Belgrade]". V. Đorđević, *Uspomene: kulturne skice iz druge polovine devetnaestoga veka*, 1 (Belgrade: SANU, 2022), 28.

[10] I would like to thank Annemarie Sorescu-Marinković for the explanations of the meaning of the word *čuleka*.

[11] The etymology of the word Kleisoura comes from the Latin word *clausura*, which means narrow passage. I would like to thank the Leko family for the copies of the genealogies made by Marko Leko (1929–2005), PhD, professor at the Faculty of Science and Mathematics, University of Belgrade.

18th century. Initially, they moved to the town of Bela Crkva in the Habsburg Monarchy's Banat Military Frontier, present-day Serbia, but then moved to Belgrade, the capital of the Ottoman autonomous Principality of Serbia, in 1820. Migration to the northern areas of the Balkans was gradual. Merchants from the central Balkans used to travel and settle in the Habsburg Empire for business purposes. The departure was probably gradual because they had previously gone to cities in the northern Balkans and moved to the Habsburg Monarchy for business reasons. Of course, they did not take their families with them on business trips. Judging by the known biographies, not only Aromanian and Greek families but also Serbian families from the regions where the Leko family came from maintained strong ties with their homelands. Due to the trade networks that connected the central Balkans with the cities of the Habsburg Empire for centuries, they remained outside the Ottoman Empire from time to time, for a longer or shorter period, and in some cases permanently. Those who stayed permanently sometimes became subjects of the new state, and sometimes they kept their old Ottoman citizenship because it made it easier for them to do business in the Ottoman Empire. Aromanians (Tsintsars) and Greeks once had a large economic and cultural center called Moscopole, (Μοσχόπολις, Moskopolje), now a village named Voskopojë in southeastern Albania, with numerous churches, a developed business life, schools, and a printing house. Aromanians used the Greek language and alphabet. They lived in cities all over Southeast Europe, from Constantinople to Vienna, and did business in Belgrade, Sarajevo, Zemun, (Sremska) Mitrovica, Novi Sad, Sopron (Ödenburg), Buda, Győr, and Eger.[12] The most famous Aromanian family in the Habsburg Empire was certainly the Sinas family (Σίνας), which had come to Vienna from Moscopole via Niš and Sarajevo. Simon George Sina von Hodos und Kizdia (1753–1822) and Barons George Sina (1783–1856) and Simon Georg von Sina (1810–1876) were bankers, entrepreneurs, and benefactors in the Habsburg Empire.[13] The final departures from the homeland in the central Balkans were caused by the violence of the semi-independent local pashas. Many Orthodox Christian families emigrated during this period. The central government of the Ottoman Empire was weakening. According to family tradition, troops of the notorious Ali Pasha of Ioannina (1740–1822) attacked the village of Fourka and killed Vladan Đorđević's great-grandfather, the priest Fr. Eftimios (Ευθύμιος). In his *Memoirs*,

[12] D. Popović, *Les Aroumains : extrait de mon livre "O Cincarima" (2e édit.) Beograd 1937* (Belgrade: Institut balkaniques, 1938).

[13] See the history of the von Baich family in: G. Baich, T. Pampas, *Von Blace nach Wien: Wege der Familie von Baich aus den Bergen Makedoniens im osmanischen Reich in die Hauptstadt der Habsburger Monarchie* (Berlin: Leykam Buchverlagsgesellschaft m.b.H. & Co. KG, 2023).

Vladan Đorđević recorded what his grandmother Anastasia had told him: "The gaze of her tired soul did not stop even on that Macedonian plain, but climbed to the top of those mountains, which are on the border between Epirus and Arbëria [Albania], where the village of Fourka is, where even today there are white stones but deserted 'courts' of the former great Chuleka family... She was brought to those 'courts' as his bride by Fr. Eftimios's son Dimitris... There she was the mistress of an estate farmed by a hundred workers who worked in Chuleka's vineyards, orchards, and fields during the summer […] The happiness did not last long. [..] Terrible cruelty arose throughout the country. Bloody waves climbed up to the heights where Fourka was. The robbers heard that the priest Eftimios Chuleka had rich 'courts' in that village, [...] A dark day dawned… Her husband Dimitris had gone on business to Vienna. The robbers grumbled to rob the palace... They killed her father-in-law, Fr. Eftimios and then plundered the whole house".[14]

As is well known, the Tsintsars (Aromanians), like the Greeks, are of Byzantine (Roman) origin. The inhabitants of the Byzantine Empire referred to the polity as Rome and to themselves as "Ρωμαῖοι (Rhōmaîoi)" (Romans – citizens of the Roman Empire). The Tsintsars and Greeks were well aware of their role as heirs of the Roman (Byzantine) Empire and considered the Orthodox Church based in Constantinople and Byzantine culture to be their heritage. Aromanian is an Eastern Romance language. Its vocabulary, morphology, and syntax are derived from Latin, but it was subordinate to Greek, the language of education and of the Orthodox Church in Constantinople. Latin and Greek were the dominant languages of the Roman Empire. It could be said that the existence of the Aromanian language testifies to the continuous dualism of these two languages . The official transition from Latin to Greek in the Byzantine Empire began around the 7th century. The terminology is sometimes confusing. The Greek language was called "Romaiika" (the language of the Romans!) for a long time. Aromanians doing business in cities largely embraced the Greek language and culture. Intermarriage between Orthodox Greeks, Aromanians, and Serbs was common in urban areas, especially if they all spoke Greek as the *lingua franca*. Since mixed marriages were common among the city's upper classes, some Belgrade families were not entirely sure whether they were of Greek, Tsintsar, or Serbian ethnic origin. On the other hand, they sometimes had a very

[14] Đorđević, *Uspomene*, 19. The attacks on Christians continued after the death of Alipasha of Ioannina. It is possible that Dimitrije Gymo settled after 1833. Jovanović Simić, *Vladan Đorđević*, 15, 252.

clear tradition and evidence that, for instance, they were of Greek rather than of Tsintsar origin, etc.[15]

Apart from the businesses they ran, they had their own churches and schools (the Greek quarter in Vienna). One could start schooling in Greek in Belgrade, continue in Zemun, move on to Buda, and finish in Vienna or Trieste. Business and cultural networks spread from Western European cities to Vienna, Buda, Pest, Constantinople, Odessa, and the country of the Khazars.[16]

The Greek-Aromanian community, like any community or ethnic group, included different social strata.[17] Vladan Đorđević was born in the highest echelons of this community. To understand the social context and position of his family in 19th-century Belgrade society, it is of utmost importance to look at the history of his mother's family. The Leko family belonged to the elite of the Serbian society in the 19th and 20th centuries, actively participating in the life of the Principality and Kingdom of Serbia and making a significant contribution to the development of the Serbian state, science, and culture. As noted by Milan Jovanović Stoimirović: "Already in the first half of the 19th century, the Leko family played a major role among the Belgrade families of Greek-Tsintsar origin (these families were later "Serbianized"). Those wealthy people had relatives from Thessaloniki to Pest".[18] Vladan Đorđević's uncle, kyr (from *kyrios* – Sir, mister) Toma (Tomas) Leko (1814–1877), rentier and wholesaler, son of Marko (Marc) Leko (1780–1832), married Aspasia (1833–1889), daughter of Duka Pešika (Peshika), also from Vlachokleisoura.[19] The second daughter of Duka Pešika was married to Nikola (Nicholas) P. Kiki (Kyky) from a well-known Belgrade Aromanian family. The branches of the Pešika family created a whole family business network in the Balkans (e.g., Pešikov in Sofia, Bulgaria). They had branches and offices in Trieste since 1840. On the other hand, in 1835, Koča (Constantine) Duka Pešika married Katarina (Catherine) Katica

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[15] See the family trees of Hadži-Toma (of Greek descent), Ristić, and Ćipra (Kipra) families in: B. Milosavljević, *The world and times of Slobodan Jovanović (1869–1958): on the occasion of 150th anniversary of his birth* (Belgrade: SASA, 2021), 147–151, 153. https://hdl.handle.net/21.15107/rcub_dais_14694

[16] In Belgrade, in addition to the Greek (Greek-Aromanian) colony, there was also a large community of German origin, as well as a German-speaking population (Czechs, Slovaks, etc.). This was a favorable circumstance for learning foreign languages, of which Vladan Đorđević made good use.

[17] B. Milosavljević, *Beogradski rodoslovi* (Belgrade: Institute for Balkan Studies SASA, 2020), 55, 110–112.

[18] Jovanović-Stojimirović, *Siluete*, 333.

[19] The business books of Tomas (Tomas) Leko, which were kept in Greek, have been preserved.

Kara-Marković (born in 1815), who was the daughter of Nikola Kara-Marković (1776–1816), the voivode of Rujno in the nahiya of Užice, and Sara, Karađorđe's daughter.[20] Katarina Duka Pešika's uncle was the ruling prince of Serbia, Alexander (Aleksandar) Karađorđević.

Vladan Đorđević's first cousin was Dr. Marko T. Leko (1853–1932), a chemist, scientist, professor, and rector of the Belgrade Great School, member of the Serbian Learned Society and President of the Red Cross. Leko graduated in chemistry from the Polytechnic School at Zürich (ETH) and obtained his doctoral degree in 1875. He was married to Danica Antula (1866–1951), also from an old Belgrade family of Aromanian descent (she was the eighteenth child in the family). Her father Konstantin (Constantine) Antula (1819–1882), MP, and municipal councilor and member of the Commercial Court, as well as her mother, Katarina J. Naslas, were both born in Vlachokleisoura. The sons of Marko and Danica Leko were Infantry Brigadier General Jovan M. Leko (1892–1964), the King's adjutant and Chamberlain (after WW II, he lived in Washington D. C.); Dr. Aleksandar M. Leko (1890–1982), a chemist, Dean of the Technical Faculty, President of the Serbian Chemical Society (he completed his doctorate in chemistry at Fribourg University in Switzerland); Dimitrije M. Leko (1887–1964), architect (graduated in Karlsruhe, Germany), professor and Dean of the Faculty of Architecture at the University of Belgrade (his uncle Dimitrije T. Leko was also a prominent architect), and Dragomir M. Leko (general manager of the *Prometna* bank). Their sister Maria (1860–1911) married Aleksa (Alexis) Kumanudi (Koumanoudis, Κουμανούδης) from a prominent Belgrade family of Greek descent from Adrianople (Edirne in Turkey). There were two main branches of the Kumanudi family, the Serbian and the Greek. Kosta (Constantine) D. Kumanudi (1874–1962) was professor at the Faculty of Law at the University of Belgrade, Minister of Finance, and Mayor of Belgrade; his first cousin Stefanos Koumanoudis (Στεφάνου Αθ. Κουμανούδης, 1818–1899), was a Greek classical philologist and archaeologist, and professor of Latin philology at the University of Athens.[21]

Vladan Đorđević's godfather was Konstantin (Constantine) "kyr-Koča" Gherman (German). The family name Gherman(i) was a metaphor for the "deep state" in Serbia, especially during the reign of Prince Miloš. The Ghermans kept

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[20] Milosavljević, *Beogradski rodoslovi*, 120, 318–319.

[21] The Koumanoudis family left Adrianople around 1820. They settled in Bucharest (Romania), and later in Silistra (today's Bulgaria) and Belgrade (Serbia). Kosta Koumanoudis' mother was of German origin (Hermine Gruber), the daughter of a banker from Bucharest. His older first cousin Stefanos Koumanoudis spent his childhood in Bucharest and Silistra. I would like to thank Kosta Kumanudi for the family tree of the Kumanudi family.

a network of agents from Belgrade to Bucharest to St. Petersburg.[22] Dr. Adam Gherman, Koča Gherman's son and a captain in the Serbian Medical Corps, was godfather to Vladan Đorđević's son, Milan, in 1874. Koča Gherman's grandson, by his daughter Mileva (married to infantry colonel Svetozar Hadžić), was army general Stevan (Stephan) Hadžić (1868–1931), Minister of the Army and Navy of the Kingdom of Yugoslavia.

The Greek-Aromanian community had close ties to the Orthodox Church.[23] As a boy, Vladan Đorđević spent a lot of time with his paternal grandmother, Anastasia (Ἀναστασία), Mana (1784–1878), who knew the liturgy in Greek by heart. Vladan Đorđević recorded in his *Memoirs* that he knew the entire liturgy in Church Slavonic by heart, as well as many hymns (troparions and kontakions) and liturgical chants. He was an altar boy at the Belgrade Cathedral. Although his grandmother did not understand Church Slavonic, she listened to him with pleasure. She told him about his great-grandfather who was once a priest in Fourka. Vladan Đorđević's description of the "revolution" that took place in his mind is an impressive picture of the state of mind of an entire generation. The natural sciences, which had achieved enormous practical success, fascinated them all. "Because of physics and chemistry, operational medicine, and surgery, because of Darwin and Haeckel, he had long ceased to believe in those ceremonies with which priests adorn Christian worship, but continued to sing religious hymnswith great pleasure".[24] Although he replaced faith in God with faith in the natural sciences, Vladan Đorđević did not forget the images of his childhood nor the Greek-Byzantine culture he adopted at home and the Belgrade Greek School. He was a prolific writer, covering a broad range of subjects. However, after he was elected to the Serbian Royal Academy, he chose "Greek and Serbian education" as the topic of his Introductory Address. The Introductory Address, greatly expanded, was published as a book in 1896, with three chapters: (I) Byzantine and Old Serbian State. Roman [Rhōmaîoi] and Serbian ["Srbulje" – the Serbian recension of Old Church Slavonic] Literacy and Education; (II) From the Collapse of the Byzantine and Old Serbian states to Korais [Ἀδαμάντιος Κοραῆς, Adamantios Korais] and Dositej [Obradović]; (III) Korais and Dositej.[25] Vladan Đorđević wrote in detail about the continuing Greek education system (during Ottoman rule) in the territory of former Byzantium, including the area where his ancestors lived. He mentions "[Emmanuel] Goumas' school [a.k.a. Gioumeios or Gioumas School, Σχολή Εμμανουήλ Γκιούμα]"

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[22] Milosavljević, *Beogradski rodoslovi*, 125, 311–312.

[23] Jovanović-Stojimirović, *Siluete*, 333.

[24] Đorđević, *Uspomene*, 88.

[25] V. Đorđević, *Grčka i srpska prosveta* (Belgrade: Srpska kraljevska akademija, 1896).

in Ioannina from 1657 until 1821, which may have had something to do with his family (since his surname was originally Gima, or Jimo, Gimas or Gioumas). He lists a total of seven Greek schools in Ioannina, the capital of a large Pashalik.[26] The teachers in these schools had usually studied in Italy. He mentions the example of the school in Adrianople (Jedrene), noting that "its continuous development lasted a full 300 years, up to the time when an honorary member of our Academy, Stefanos Koumanoudis, attended that school, and today now teaches Latin at the University of Athens".[27] Students of the famous Evangelical School (Ευαγγελική Σχολή) established in 1733 in Smyrna (now Izmir, Turkey) included the towering figures of the Greek and Serbian Enlightenment, Adamantios Korais (1748–1833) and Dositej Obradović (1739–1811). In the study devoted to Greek and Serbian education, Đorđević makes no distinction between Greeks and Aromanians, surely because their education would have been uniquely Hellenic in any case.

On the one hand, Vladan Đorđević was influenced by Greek-Tsintsar culture and, on the other, by the Serbian tradition passed on by his stepmother. Đorđević's mother died in 1854 when he was still a boy. His widowed father remarried a few years later. Vladan Đorđević's stepmother, Katarina Miljković, née Vučković (1834–1899), was a widow herself, having lost her husband at an early age. Her first husband, cavalry lieutenant Anđelko Miljković, slipped on some ice while riding and hurt his leg. The injury got infected, and he died, probably from gangrene. The stepmother had a son from her first marriage and brought him into the Đorđević family: Ljubomir Miljković (1853–1918), who later studied in Jena under Ernst Haeckel. Đorđe and Katarina Đorđević had a daughter, Poleksija/Polexia (1858–1874), Vladan Đorđević's half-sister. Ljubomir Miljković married Mileva Simić, daughter of Stanoje Simić, Governor of the Užice district (son of *knez* Sima Nikolić Nikolajević from Zaječar) and sister of Svetislav St. Simić, professor and diplomat, a diplomatic envoy and then Minister Plenipotentiary in Sofia and Consul in Priština, and founder of the influential *Serbian Literary Gazette* (*Srpski književni glasnik*).

Vladan Đorđević married his girlfriend, whom he had met during his student days in Vienna, Paulina Bittner, on November 11 (23), 1871, in Belgrade. His wife was born in Vienna in 1847 and died in 1916 in Vrnjačka Banja, where many Belgrade families had fled during the Great War. She was a daughter of Josef Bittner (1802–1871) and Anna Barbar Bittner, née Aigner (1814–1875). Her brother, Franz Bittner (1852–1913), a lieutenant colonel in the Austro-Hungarian army, was married to Albertina Bertha (Betty) Goldstein (they had a daughter, Paula), and her other brother, Josef Bittner (1844–1901), a civil ser-

[26] Đorđević, *Grčka i srpska prosveta*, 89.

[27] Đorđević, *Grčka i srpska prosveta*, 86.

vant in the Post Ministry (previously a commissioned officer), was married to Baroness (Freiin) Emilia von Schellerer-Pettendorf.[28]

Vladan and Paulina Đorđević had many children, but many of them did not survive into adulthood. Out of (apparently) 24 pregnancies, eleven children were recorded in the baptism registers.[29] Their eldest two children were born out of wedlock in Vienna.

The Belgrade press reported in 1912 that Lieutenant Milan Vl. Đorđević (1874–1918), a Belgrade lawyer (a former diplomat and *chargé d'affaires* in Constantinople) who had distinguished himself in the battles at Merdar, in the Battle of Monastir (Bitola) captured the Turkish trench of Oblakovo, on the extreme right wing, and was severely wounded in the attack on the second trench. After he recovered, he returned to active service and entered Dubrovnik in 1918 at the foreguard of the Serbian Army. However, he soon died of pneumonia on December 2 [15], 1918. In his 1930 will, Vladan Đorđević made a bequest to the Royal Serbian Academy Foundation under the name Milan Vl. Đorđević's Literary Fund. Vladan and Pauline's son Aleksandar Vl. Đorđević lived in the family villa in the Belgrade neighborhood of Topčiderski brdo. He died in 1964. The third son of Vladan Đorđević, Nikola Vl. Đorđević (1885–1953), was chief secretary of Dudzeele Corporation Patent Exploitation Company in Paris.[30]

Vladan Đorđević's daughter Mara (Maria/Mara, 1877–1915) married the well-known Constantinople banker Dimitris Vlastari. Their son Constantine Vlastari (1896–1970), a lawyer, had a son and a daughter called Ariana (born in Paris, 1938). Vladan Đorđević's daughter Natalie (Natalija, 1879–1960) was married to Colonel Vladislav J. Deroko (1871–1944). The Deroko (Derocco or De Rocco) family had originated from Dubrovnik. Jovan Deroko, professor at the Lyceum in Belgrade (from 1850), had sons with Katarina Vuković from Vienna: division general Nikola Deroko, Evžen (Eugen) Deroko (father of the famous Belgrade architect and intellectual Aleksandar Deroko), deputy director of state railroads Marko Deroko, the military veterinarian and colonel Vladislav

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[28] MST, CADM, Non-inventoried material, Baptismal entry of Franz Bittner (born 6 February 1852), St. Urlich parish, Vienna, 21 February 1942.

[29] The children of Vladan and Pauline Đorđević were: Stajka (1866–1868); George (Đorđe, 1871–1875); Helen (Elena, 1873–1873); Milan (1874–1918); Alexander (Aleksandar, 1875–1964); Maria (Marija, 1876–1915); Natalie (Natalija, 1876–1960); Ljubomir (1881–1896); Olga (1884–1884); Nicholas (Nikola, 1885–1953); Dushan (Dušan, 1888–1889). Jovanović Simić, *Vladan Đorđević*, 248–249.

[30] Natalie Petrović Njegoš, née Konstantinović (1882–1950), a member of the Obrenović and Petrović Njegoš dynasties, was married for the second time to Gaston Hugues comte Errembault de Dudzeele (1877–1961), son of the Belgian minister to Serbia.

Deroko, and Dragutin Deroko, a cartographer. Son of Colonel Vladislav and Natalija Deroko, grandson of Vladan Đorđević, was Artillery Captain 2nd Class Jovan Deroko (born in Cresot, France, 1912). After the April War, he escaped capture and soon joined the troops under the command of General Staff Colonel Dragoljub Draža Mihailović. This grandson of Vladan Đorđević was killed at the very beginning of the civil war in Serbia by the Communist-led Partisans near Ljubić on November 7, 1941.[31]

Vladan Đorđević died in Baden on August 18 (31), 1930.[32] In his lifetime, he was a generous donor and benefactor (for instance, he donated an entire library to the newly founded universities in Skopje and Subotica). His worth was estimated at over one and a half million dinars. He left half a million dinars to his sons Aleksandar and Nikola and 100,000 dinars to his grandson Vladan A. Đorđević. At that time, for half a million dinars, one could buy or build a modern family house in the very center of Belgrade.

Vladan Đorđević's family is an illustrative case of the processes of cultural transfer in Belgrade in the 19th and 20th centuries: a blend of "Greek" upbringing and ethnic origin, the influence of the Serbian environment, society and family, and education in Vienna, the culture of the Austro-Hungarian capital and Austria, and finally, the influence of the families of his sons-in-law from Constantinople and Dubrovnik. Vladan Đorđević was not the only high official of the Kingdom of Serbia who was not of Serbian descent.[33] As was the case in other European countries of that era, subjects of the Kingdom of Serbia who possessed German or Jewish ancestry were able to ascend to the uppermost echelons of society and the professions. They were, of course, fully integrated into the framework of the Serbian (later Yugoslav) state and society.

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[31] N. Dević, "Kapetan Jovan Derok (1912–1941), biografija", *Vojnoistorijski glasnik* 1, (2021), 157–183.

[32] MST, CADM, Copy of the last will of Vladan Đorđević, Belgrade, 5 July 1931, MNT.T: 11.177.1.

[33] For instance, Vukašin J. Petrović (1847–1924), who served as Minister of Finance and was an economist, was of Jewish descent (Schauengel). Ljubomir Klerić (1844–1910), a member of the Serbian Royal Academy, Minister of Education, and Minister of Economy, was of German descent (born Julius Kleru).

Abbreviations

AS – Archives of Serbia
ASASA – Archives of the Serbian Academy of Sciences and Arts
HAB – Historical Archives of Belgrade, Collection of Church Registers
MST, CADM – Museum of Science and Technology, Collection of Archival Documents – Medicine

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Carlo Sforza and the Attempt to Define a New Italian Foreign Policy in the Mediterranean, the Adriatic, and the Danube Region, 1920–1921

Abstract: At the end of World War I, Italy sought to expand its influence in Central and Eastern Europe. To achieve this, it was crucial to establish good relations with the Balkan region, resolve the Adriatic issue peacefully, and assert its presence in the Mediterranean. This paper broadly analyses this significant period in postwar Italian foreign policy by outlining the strategies implemented by Italian Foreign Minister Carlo Sforza from 1920 to 1921 in the Mediterranean, Adriatic, and Danube regions. Sforza attempted to mediate and intervene in many significant issues of the international debate, including Albanian independence, support for Mustafa Kemal's Turkish nationalist movement, relations with the Kingdom of Serbs, Croats, and Slovenes (SCS), and support for the Little Entente. The détente in Adriatic relations, produced by the signing of the Treaty of Rapallo with the Kingdom of SCS and the beginning of dialogue with the Czechoslovak Republic and the Kingdom of Romania, formed the basis for true politics of power in Eastern Europe, particularly among the successor states of the Austro-Hungarian Empire. Analysing historiography, diplomatic documents, and archival records, the paper examines Carlo Sforza's diplomatic moves in regions that would return to the focus of Italian diplomatic interests in the coming years, entangling with the directives of Fascist imperialism.

Keywords: Carlo Sforza, Italian foreign policy, interwar period, Danube-Balkan area, Southeast Europe, Adriatic, Mediterranean, Treaty of Rapallo, Little Entente.

1. *Mediterranean and Lower Adriatic: Albania's Independence and the Turkish Nationalist Movement*

When the war ended, Giovanni Giolitti returned as the leading figure in the Italian government on 15 June 1920. In the challenging endeavor of pursuing a genuine climate of international peace, he selected Carlo Sforza, a career diplomat, former High Commissioner in Constantinople during the premiership of Vittorio Emanuele Orlando and Undersecretary at the Ministry of Foreign Affairs in the government led by Francesco Saverio Nitti, to assist him.[1]

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[1] About Carlo Sforza, see C. Sforza, *Diario prefascista*, ed. M. Toscano (*Nuova Antologia*, 1967–1968); C. Sforza, *Un anno di politica estera: discorsi*, ed. A. Giannini (Rome:

The decision to appoint Carlo Sforza as Foreign Minister was strategic, both in terms of internal and foreign policy: Giolitti had been a neutralist in the war, while Sforza had been an interventionist, so the latter's appointment was meant to mitigate the anti-Giolittian sentiments expressed by various political groups. Furthermore, Sforza was held in high esteem, for the same reason, by both France and Great Britain. Piero Quaroni wrote in this regard: "Few Italian personalities have had the name and dazzle of Carlo Sforza abroad".[2] During his tenure as Undersecretary for Foreign Affairs, Sforza had had the opportunity to show his diplomatic skills and build a network of contacts both within the Ministry and in diplomatic relations, especially in French circles. Strongly critical of the foreign policy conducted by the revisionist and pro-German Nitti government, Sforza understood the need to establish a preferential relationship with France as the basis for a real Italian role in Central and Eastern Europe. The appointment of Salvatore Contarini as Secretary General of the Ministry of Foreign Affairs in January 1920 also contributed to strengthening his position in the eyes of the French.

Sforza's foreign policy project had a clear European dimension, namely "to seize the opportunity, created by the collapse of the Habsburg Monarchy and the decline of Russia, to insert itself into the process of reorganising the Danube-Balkan world and to establish, in mutual support against the inevitable future German pressure, the new international strength of Italy".[3] As a liberal-

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Libreria di Scienze e Lettere, 1921); C. Sforza, *Pensiero e azione di una politica estera italiana*, ed. A. Cappa (Bari: Laterza, 1924); C. Sforza, *Diplomatic Europe since the Treaty of Versailles* (New Haven: Yale University Press, 1928); C. Sforza, *L'Italia dal 1914 al 1944 quale io la vidi* (Rome: Mondadori, 1945); C. Sforza, *Jugoslavia, storia e ricordi* (Milan: Donatello De Luigi, 1948); C. Sforza, *Discorsi parlamentari*, Collana dell'Archivio Storico del Senato della Repubblica, nuova serie 14 (Bologna: Il Mulino, 2006); L. Zeno, *Carlo Sforza. Ritratto di un grande diplomatico* (Florence: Le Monnier, 1999); B. Bagnato, "Carlo Sforza. Passione e realismo di un diplomatico". In *La politica estera dei toscani. Ministri degli Esteri nel Novecento*, ed. P. L. Ballini (Florence: Polistampa, 2012), 69–85; G. Giordano, *Carlo Sforza: la diplomazia 1896–1921* (Milan: Franco Angeli, 1987); A. Brogi, "Il trattato di Rapallo del 1920 e la politica danubiano-balcanica di Carlo Sforza", *Storia delle relazioni internazionali* 5, no. 1 (1989), 4–46; B. Bracco, *Carlo Sforza e la questione adriatica: Politica estera e opinione pubblica nell'ultimo governo Giolitti* (Milan: Unicopli, 1998); C. Vallauri, "Il ritorno al potere di Giolitti nel 1920", *Storia e politica* 4 (1962) and 2 (1963); F. Rudi, "La missione diplomatica di Carlo Sforza a Corfù (1916–1918)", *Rivista di studi politici internazionali* 91, no. 2 (2024), 171–233; L. Micheletta, *Italia e Gran Bretagna nel primo dopoguerra*, vol. 1 (Rome: Jouvence, 1999), 191–373; and L. Monzali, *Italiani di Dalmazia 1914–1924* (Florence: Le Lettere, 2007), 191–326.

[2] P. Quaroni, *Il mondo di un ambasciatore* (Milan: Ferro, 1965), 298.

[3] M.G. Melchionni, "La politica estera di Carlo Sforza nel 1920–21", *Rivista di Studi Politici Internazionali* 36, no. 4 (1969), 537–570.

democratic nationalist and *connoisseur* of the Habsburg lands, the Balkans and the Mediterranean, Sforza advocated for the establishment of nation-states in these regions.

Giolitti showed that he shared Sforza's political project, confirming his assent in the speech he delivered before the Chamber of Deputies during the inauguration of his new government.[4]

There were many points of contention left unresolved by the Nitti government, including, as regards relations with Southeast Europe, the structure of Albania, the problems on the Greek-Turkish front and the Adriatic question.

With regard to Albania, the prime minister constantly reiterated the objective of his actions in that country: absolute independence.[5] The situation in which Albania found itself in the summer of 1920 was particularly critical, and Giolitti did not hesitate to define it as "anarchy".[6] Civil and religious conflicts and clashes were the order of the day, and the country was literally prey to neighboring peoples, who undermined it from all fronts to occupy a part of it. The Italian goal was to achieve complete independence from all external actors, leading to the emergence of the Vlora (Vlorë) issue. Vlora was a strategic point: if a power hostile to Italy had occupied it, this would have represented a serious threat. Albania was objectively unable to defend Vlora against any power that had even a modicum of naval strength. Consequently, Italy was unable to immediately vacate Vlora without being certain that it would not be occupied by some other power that could use it to her detriment and that, in all probability, would never leave the city.

Therefore, on 28 June 1920, Giolitti and Sforza decided to send to Albania Carlo Alberto Aliotti, who had already served as the Italian representative

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4 G. Giolitti, *Discorsi parlamentari*, 4 vols. (Rome: Tipografia della Camera dei Deputati, 1953–1956), Chamber of Deputies, session of 24 June, 9 and 15 July 1920, cited on 1749–1754.

5 Reference in Giolitti, *Discorsi parlamentari*, Chamber of Deputies, session of 27 June 1920, 1767–1768. On the relations between Italy, Austria, and Albania before the war, see A. Duce, *L'Albania nei rapporti italo-austriaci 1897–1913* (Milan: Giuffrè, 1983).

6 Giolitti, *Discorsi parlamentari*, Session of 27 June 1920, Albania, 1767–1768. On Italian–Albanian relations between the First World War and the postwar period, see P. Pastorelli, *L'Albania nella politica estera italiana 1914–1920* (Naples: Jovene, 1970); D. Bakić, "The Italo–Yugoslav Conflict over Albania: A View from Belgrade, 1919–1939", *Diplomacy & Statecraft* 25, no. 4 (2014), 594; A. Basciani, "Struggle for Supremacy in the Adriatic: Italy, the SHS Kingdom, and the Albanian Question", *Qualestoria* 49, no. 1 (2021), 123–137; A. Basciani, "Tra politica culturale e politica di potenza: Alcuni aspetti dei rapporti tra Italia e Albania tra le due guerre mondiali", *Mondo Contemporaneo* 8, no. 2 (2012), 91–114; and O. J. Schmitt, *A Concise History of Albania* (Cambridge: Cambridge University Press, 2022).

in Durrës before the Great War, to start negotiations with the Albanian leaders in Vlora who had risen against the Italian occupation forces. A month later, Sforza sent confirmation that he had delivered to the Greek minister in Rome, Lampros Coromilas, a note denouncing the agreement signed on 29 July 1919 by the then Italian Foreign Minister Tommaso Tittoni and the Greek Prime Minister Eleutherios Venizelos on the partition of Albanian territory.[7] The negotiations produced a memorandum of understanding signed on 2 August by the Italian minister Gaetano Manzoni and the Prime Minister of the new Albanian government, Sulejman Delvina, consisting of 8 articles, the so-called "Treaty of Tirana",[8] by which Italy would accept Albanian independence and withdraw its troops from Vlora and the rest of Albania. In return, they would recognize Italy's right to militarily occupy the islet of Saseno, located in front of Vlora. The deadline for the complete evacuation of the district of Vlora and the coast was set at thirty days, starting from 3 August.[9]

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[7] The treaty required the Italian government to support, during the peace conference in Paris, the Greek claims over the whole of Thrace, southern Albania (Gjirokastra and Korçë) and Asia Minor (Sandžak of Smyrna and Sarukkan), and ceded to Greece sovereignty over the islands of the Aegean Sea occupied after the Italo-Turkish War of 1911–1912, except Rhodes. For their part, the Greeks pledged to support the Italian requests for a mandate over the State of Albania and the annexation of Vlora and its hinterland, confirming the neutralisation of the Corfu Channel and the coast up to Cape Stilos. Greece would grant Italy a free port in Santi Quaranta and a free zone in Izmir for fifty years. For more details on the agreement, see *I Documenti Diplomatici Italiani* (Rome: Istituto Poligrafico dello Stato, 1955–), sixth series, vol. IV, docs. 174, 175, 177 and 179. The text is also reproduced in A. Giannini, *Documenti per la storia della pace orientale (1915–1922)* (Rome: Istituto per l'Oriente, 1933), 17–21. For the additional protocol, see Carlo Sforza's speech to the Chamber of Deputies on 6 August 1920 in *Atti Parlamentari*, Chamber of Deputies, XXV Legislature, 1919–1920, *Discussions*, vol. V, 4985. For further discussion, see Micheletta, *Italia e Gran Bretagna nel primo dopoguerra* (Rome: Jouvence, 1999), 28–32; and M. G. Melchionni, "Accordi italo-greci a Parigi (1919–1920)", *Rivista di Studi Politici Internazionali* 48, no. 3 (1981), 471–473.

[8] Archivio Storico Diplomatico del Ministero degli Affari Esteri e della Cooperazione Internazionale, Roma (ASMAE), *Political Affairs 1919–1930* (AP 19–30), Albania, b. 690, f. "Albania Tirana Protocol", Sforza to Giolitti and Bonomi, Rome, 7 August 1920, annex 1: *Preliminary Protocol*.

[9] ASMAE, (AP 19–30), Albania, b. 690, f. "Albania Tirana Protocol", Sforza to Giolitti and Bonomi, Rome, 7 August 1920, annex 2: Manzoni to the Ministry of Foreign Affairs, Durrës, 2 August 1920. For military reports on the evacuation operations of the district of Vlora following the implementation of the Protocol, see ASMAE, (AP 19–30), Albania, b. 690, f. "New Structure of Albania. Execution of the Tirana Protocol. Treaties for Vlora". On the appointment and work of the Italian-Albanian Joint Commission provided for in Articles I and V of the Protocol, see ASMAE, (AP 19–30), Albania, b. 691, f. "Tirana Protocol and Work of the Italian and Albanian Delegation".

In a manner analogous to the endeavour to safeguard Albanian autonomy by asserting dominion over Vlora (and subsequently, following the expulsion, only Saseno), Italy aspired to preserve the prerogatives in the Mediterranean it had received by the Treaty of Sèvres and the Tripartite Agreement to uphold the independence of Turkey. Carlo Sforza's pro-Turkish leanings, evident since the period in which peace was being negotiated with the former Ottoman Empire, became manifest during the year when he held the Foreign Ministry. This led to a marked deterioration in relations with Great Britain and, on the other hand, the opening of another line of dialogue with France, which equally showed interest in a rapprochement with Turkey.[10] When the Treaty of Sèvres between the Allies and Sultan Mehmed VI was finally signed, an uncertain period began for Italy. In this case, Italy was aware that it had just one option: only an agreement with the Turks could make effective and concrete the influence that the Tripartite Agreement had granted it in words.[11]

During the Boulogne Conference (21–22 June and 27–28 July 1920), Sforza proposed a negotiation with the nationalist movement of Mustafa Kemal, a proposal that immediately put Italy at odds with Great Britain. The British prime minister, David Lloyd George, had spoken out several times against any kind of deal with Kemal or revision of the peace treaty proposed to Turkey and rejected by Turkish nationalists. This element came on top of another previous reason for disagreement, namely the British failure to sign the Tripartite Agreement by which Italy, Great Britain and France had established their re-

[10] On the foreign policy conducted in the Near East under the Giolitti–Sforza government and on relations with the Allies, in particular with Great Britain, see Micheletta, *Italia e Gran Bretagna nel primo dopoguerra*, 191–219, 263–287, 289–318, 319–338. For an overview of the "Eastern question", see A. Giannini, *L'ultima fase della questione orientale (1913–1939)* (Milan: Istituto per gli Studi di Politica Internazionale, 1941). On the relations between Turkey and the Allies in the immediate post-war period, see C. Le Bras, *Entre Constantinople et Ankara: les diplomaties britannique, française et italienne et le défi de la dualité gouvernementale en Turquie (1918–1922). Aspects politiques, juridiques et pratiques*, PhD diss., Université de Nantes, École doctorale no. 604, Sociétés, Temps, Territoires, 25 November 2021. For further discussion, see V. Sommella, *Carlo Galli, la diplomazia italiana e le relazioni fra Italia e Turchia: Dalla crisi dell'Impero ottomano alla nuova Turchia kemalista* (Soveria Mannelli: Rubbettino, 2024); F. Ahmad, *From Empire to Republic: Essays on the Late Ottoman Empire and Modern Turkey* (Istanbul: Bilgi University Press, 2008); G. Del Zanna, *La fine dell'Impero ottomano* (Bologna: il Mulino, 2012); P. Dumont, *Mustafa Kemal invente la Turquie moderne* (Brussels: Éditions Complexe, 2006); R. Gingeras, *Fall of the Sultanate: The Great War and the End of the Ottoman Empire, 1908–1922* (Oxford: Oxford University Press, 2016); and F. L. Grassi, *L'Italia e la questione turca (1919–1923): Opinione pubblica e politica estera* (Turin: Silvio Zamorani Editore, 1996).

[11] ASMAE, *Carte Sforza*, b. 8, Sforza to Giolitti, Rome, 15 May 1920.

spective zones of influence in the former Ottoman territories. During the Spa Conference (5–16 July 1920), the British Secretary of State made it clear that the agreement would not be signed until the Turkish peace treaty was ratified.

Another point of friction, to which, however, Great Britain ended up agreeing because of aligning Italian and French views and actions, was the decision to maintain embassies in Constantinople instead of downgrading the Allied presence in Turkey to the rank of legation, as proposed by Great Britain. Due to the challenging nature of the circumstances, Italy and France did not believe it was appropriate to reduce the level of their presence. Italy sent Camillo Garroni as High Commissioner, who had run the embassy before the Great War and was an opponent of declaring war on Turkey. The idea was to mediate both between the two seats of the Turkish government – Constantinople, the seat of the sultan, and Ankara, the seat of the national movement – and between Ankara and the Allies.[12] In this regard, following the government of Constantinople's proposal to dispatch a Turkish delegation to the Kemalists to persuade them to accept the peace treaty, Sforza capitalized on this opportunity by suggesting that the delegation be accompanied by representatives of the Allied governments. However, he encountered resistance from the British government, which insisted that a mission to Kemal could only be sent after the ratification of the peace treaty. This time, even the French government considered Sforza's proposal inappropriate, so it was not pursued.[13]

The situation was aggravated by the Greek crisis, which led to the fall of Venizelos and concerns about a possible restoration of King Constantine. This development prompted the Allies to adopt a wait-and-see approach. The Allies were to deliberate on the Turkish question once the Greek crisis had been resolved and the Turkish government's mission to Kemal had reached its conclusion. Only then would the Allies formulate a unified intervention strategy.[14]

The escalating crisis in the Near East prompted the Quai d'Orsay to conclude that the time had come to find a solution to the problems in the area through a direct agreement with Ankara and a revision of the Treaty of Sèvres, aligning itself with the positions of the Consulta, which was inclined to offer Turkey a revision of the treaty in exchange for its acceptance of the Tripartite Agreement. One proposal was to negotiate on Smyrna, which the treaty had as-

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[12] *Documents Diplomatiques Français* (DDF), *Ministère des Affaires étrangères* (Paris–Brussels: Imprimerie Nationale, 1997–), 1920, vol. III, doc. 13, Paris to Constantinople, 29 September 1920.

[13] DDF, 1920, vol. III, doc. 72, "Note sur l'envoi d'une mission de conciliation turque chez les nationalistes turcs", Paris, 14 October 1920.

[14] On the Greek political crisis and the Allied hostility to the restoration of King Constantine, see DDF, 1920, vol. III, docs. 225, 263, 279, 309, 333, 357, and 424.

signed to Greece, and transform it into a Greek economic privilege zone under Turkish sovereignty, as provided in the Tripartite Agreement for the Italian and French zones of influence. However, firm British opposition led to the failure of this proposal.[15]

At the Inter-Allied Conference in Paris, between 24 and 29 January 1921, the only thing that was decreed was the need, shared by all three Allies, to revise the Turkish peace treaty, without specifying the changes. At the end of the conference, Sforza spoke about the Near East with both the British and French representatives, finding the latter, of course, much more forthcoming. Talks with Alexandre Millerand and Philippe Berthelot led to the exchange, in February 1921, of a memorandum of understanding containing the points on which both governments agreed, namely the establishment of the Greek-Turkish border along the Enos-Midia line with a special regime for Adrianople, the recognition of Greek privileges over Smyrna, which would come under Turkish sovereignty, the inclusion of the Tripartite Agreement in the new peace treaty, and the hope that the policy of rapprochement would spill onto issues relating to Central European matters.[16] The Italian-British discussions were not as fortunate.

Even during the inter-allied conference in London held from 21 February to 12 March 1921, convened specifically to discuss the Eastern questions, the Treaty of Sèvres and the Greek-Turkish conflict, no solution was found for the Turkish problem. An audience was given to both the Greek delegation and the two Turkish delegations, that of Constantinople and that of Ankara, which came united and with a single programme, based on the integrity of the territories inhabited by the Turks and the full sovereignty of Turkey. Despite efforts to reach a compromise, it soon became apparent to the Allies that nothing could be done to persuade the parties to acquiesce, even marginally.[17]

Rather than a terrain for Greek-Turkish dialogue, Sforza's interest in the conference was orientated towards the search for an agreement with the nationalists. In fact, the London conference ended up determining the position taken by the Allies in the Greco-Turkish conflict, with Great Britain in favour of the Greeks and Italy and France in favour of the Turkish nationalists, encouraging rather than quelling belligerent instincts. In March, both Italy and France concluded agreements with the Foreign Minister of the nationalist government,

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[15] DDF, 1920, vol. III, docs. 237, 239, 245, 281, 304, and 429; ASMAE, *Carte Sforza*, b. 8, f. "Turchia. Telegrammi 1919–1920", Report of the Ministry of Foreign Affairs, Rome, 16 January 1921.

[16] DDF, 1921, vol. I, doc. 62, "Note du Département", 31 January 1921.

[17] On the Paris and London conferences and the Allied debate on the Near East, see Le Bras, *Entre Constantinople et Ankara*, 329–367; DDF, 1921, vol. I, docs. 36, 88, 128, 141, and 148.

Bekir Sami Bey, the French for the regulation of the military situation in Cilicia, and the Italians to set up economic collaboration in the territories of the Tripartite Agreement.[18] In addition, however, Sforza also undertook with Bekir to support the Turkish requests for a peace treaty with the Allies and to withdraw Italian troops from Asia Minor after the ratification of peace.[19] London's disappointment intensified when, after requesting a copy of the two agreements, both Paris and Rome refused to send it before submitting them to Parliament. When, in April, the complete texts came to the attention of the Foreign Office, it soon became evident that the Italian-Turkish agreement also contained political commitments, which the Consulta tried to diminish in scope. The Italian-Turkish agreement, which was not ratified by the National Assembly in Ankara, increased the existing tensions between Great Britain and Italy.[20]

2. *The Solution for the Adriatic: the Treaty of Rapallo*

Sforza discussed the Adriatic question and the government's foreign policy in the East with the former Foreign Minister Sidney Sonnino, as reported in Sonnino's diary.[21] Sonnino strongly criticized the decision to abandon Vlora, calling it a "serious mistake" with "future consequences". Vlora was not enough on its

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[18] For the Franco-Turkish agreement, see DDF, 1921, vol. I, docs. 173, 185, 190, and 197.

[19] For the text of the Sforza–Bekir agreement, see Le Bras, *Entre Constantinople et Ankara*, 787, app. 23.

[20] Le Bras, *Entre Constantinople et Ankara*, 405–407. On the English disappointment with the Franco-Turkish agreement, see DDF, 1921, vol. I, doc. 270, Paris to Constantinople, London and Rome, 4 April 1921. The episode that caused the definitive crisis of Italian-British relations was the conclusion of an agreement with Afghanistan. Between the end of May and the beginning of June 1921, a mission of the Kabul government visited Rome, and Sforza worked on a commercial treaty and the exchange of diplomatic missions between Rome and Kabul. Afghanistan represented for the British government a region of particular and exclusive interest under its control, and this Italian interference sparked a harsh British protest with accusations of intrigues and double-dealing aimed at the conduct of an all-Italian policy in the Near and Middle East. On the Italian-Afghan agreement, see Ehsanullah d'Afganistan, *Aman Ullah il re riformista. Afghanistan 1919–1929*, ed. Marika Guerrini (Milan: Jouvence, 2018), 76–81. For an overall view of Italian-Afghan relations in the interwar period, see L. Monzali, *Un re afghano in esilio a Rome: Amanullah e l'Afghanistan nella politica estera italiana, 1919–1943* (Florence: Le Lettere, 2012).

[21] S. Sonnino, *Diario 1916–1922*, ed. Pietro Pastorelli (Bari: Laterza, 1972), vol. III, 357–363, 23 August 1920.

own for Italian defense in the Adriatic, but it was important. By abandoning Vlora, Italy gave the advantage to the Greeks and Yugoslavs.

Sonnino's motto "neither give nor exceed"[22] led him to judge negatively the "excessively renunciatory policy" of Giolitti and Sforza, which, in his opinion, would not bring any benefit. Peace and friendship with the Yugoslav government would be impossible to achieve because, according to Sonnino, "Yugoslavia is held together thanks only to the open and acute disagreement with Italy".[23]

Sforza showed he agreed with this last point. Thanks to his knowledge of the Habsburg lands and the Balkans (he had served as a diplomat both in the Habsburg Empire and with the Serbian government in exile in Corfu), he understood the divisions in the Kingdom of SCS, especially the Croat-Serb opposition. His strategic objective was to politically exploit these divisions to induce the Belgrade government to see the threat of being surrounded by hostile states and internally weakened by intense national struggles. This would encourage the Belgrade government to improve relations with Rome.[24]

Giolitti believed that it was possible to establish a genuine friendship with the Kingdom of SCS.[25] The Kingdom of SCS was certainly as interested in peace as Italy, and maintaining an open conflict between the two countries would only exacerbate internal and international tensions. However, achieving a thoughtful solution rather than an improvised one required careful reexamination of the circumstances and consent of both parties. After closing the Albanian question with Italy's withdrawal from the occupation zone, the government in Rome intensified contact with the Yugoslavs. At the end of August, Sforza sent Trumbić the new Italian negotiating positions through Vincenzo Galanti, chargé d'affaires in Belgrade. Italy's renunciation of the protectorate over Albania and its willingness to no longer defend the restoration of an independent Montenegro opened the door for Italy to resume dialogue on different terms. Italy agreed not to annex Fiume as long as it remained independent and to leave the hinterland of Zara. Sforza made it clear that this was a significant political

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[22] S. Sonnino, *Diario 1916–1922*, ed. Pietro Pastorelli (Bari: Laterza, 1972), vol. III, 351, 22 October 1919.

[23] S. Sonnino, *Diario 1916–1922*, ed. Pietro Pastorelli (Bari: Laterza, 1972), vol. III, 361–362, 23 August 1920.

[24] On Sforza's support for Croatian and Montenegrin separatism, see F. Caccamo, "Il sostegno italiano all'indipendentismo croato 1918–1920", *Nuova Storia Contemporanea* 6 (2004), 23–56; F. Caccamo, *Il Montenegro negli anni della prima guerra mondiale* (Rome: Aracne, 2008); A. Becherelli, *Il Regno dei Serbi, Croati e Sloveni nell'Europa di Versailles (1918–1921)* (Rome: Aracne, 2017); M. Bucarelli, "Delenda Jugoslavia. D'Annunzio, Sforza e gli intrighi balcanici del '19–'20", *Nuova Storia Contemporanea* 6 (2002), 19–34.

[25] Giolitti, *Discorsi parlamentari, Session of 9 July*, p. 1755.

concession to the Kingdom of SCS, which meant that Rome did not have to sacrifice the secured military positions along the Alpine border. On the Dalmatian hinterland and on the possession of the islands, Italy declared itself willing to negotiate.[26]

It seemed possible to finally resolve the Balkan dispute with the Kingdom of SCS, laying the ground for friendly relations with countries of the Danube region, like the Czechoslovak Republic. The new Czechoslovak Republic was an important partner in the Danube–Balkan area. Italian diplomacy set up a system of joint pressure, and Prague, London and Paris were supposed to encourage the Yugoslavs to be more moderate and open to dialogue.[27] A few months before the signing of the Treaty of Rapallo, Carlo Sforza urged the Chamber of Deputies to ask for an imminent solution to the Adriatic question, because in a

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[26] On the negotiations about the Adriatic question and Italian-Yugoslav relations in the early post-war period, see E. Aiph, "Per un'analisi del Trattato di Rapallo", *Quaderni. Centro di ricerche storiche – Rovigno* 6 (1982), 273–293; P. Alatri, *Nitti, D'Annunzio e la questione adriatica (1919–1920)* (Milan: Feltrinelli, 1959); D. Bakić, "Nikola Pašić and the Foreign Policy of the Kingdom of Serbs, Croats and Slovenes, 1919–1926", *Balcanica* XLVII (2016); A. Basciani and E. Ivetić, *Italia e Balcani. Storia di una prossimità* (Bologna: il Mulino, 2021); F. Canale Cama, *Quella pace che non si fece. Francesco Saverio Nitti e la pace tra Europa e Mediterraneo (1919–1922)* (Soveria Mannelli: Rubbettino, 2020); M. Cattaruzza, *L'Italia e il confine orientale (1866–2006)* (Bologna: il Mulino, 2007); M. Cattaruzza, *L'Italia e la questione adriatica: 1918–1926. Dibattiti parlamentari e panorama internazionale*, Dibattiti storici in Parlamento (Bologna: Il Mulino, 2014); D. Kirchner Reill, *The Fiume Crisis. Life in the Wake of the Habsburg Empire* (Cambridge: Harvard University Press, 2020); I. J. Lederer, *La Jugoslavia dalla conferenza della pace al Trattato di Rapallo 1919–1920* (Milan: Il Saggiatore, 1966); L. Monzali, *Gli italiani di Dalmazia e le relazioni italo-jugoslave nel Novecento* (Venice: Marsilio, 2015); L. Monzali, *Italiani di Dalmazia 1914–1924* (Florence: Le Lettere, 2007); L. Monzali, *Il sogno dell'egemonia. L'Italia, la questione jugoslava e l'Europa centrale (1918–1941)* (Florence: Le Lettere, 2010); F. Caccamo, *L'Italia e la Nuova Europa. Il confronto sull'Europa orientale alla Conferenza della pace di Parigi (1919–1920)* (Milan: Luni, 2000); V. G. Pavlović, *Finir la Grande guerre dans les Balkans 1918–1923* (Belgrade: Institute for Balkan Studies SASA, 2022); V. G. Pavlović, *De la Serbie vers la Yougoslavie. La France et la Naissance de la Yougoslavie, 1878–1918* (Belgrade: Institute for Balkan Studies SASA, 2015); V. G. Pavlović, *Serbia and Italy in the Great War* (Belgrade: Institute for Balkan Studies SASA, 2019).

[27] E. Aiph, "Per un'analisi del Trattato di Rapallo", 276. On Italian-Czechoslovak relations, see D. Bolech Cecchi, *Alle origini di un'amicizia. Italia-Cecoslovacchia 1918–1922* (Soveria Mannelli: Rubbettino, 2008); F. Caccamo, "Un'occasione mancata. L'Italia, la Cecoslovacchia e la crisi dell'Europa centrale, 1918–1938", *Nuova Rivista Storica* XCIX (2015); F. Caccamo, "Italia e Cecoslovacchia negli anni Venti", *Nuova Storia Contemporanea* 2 (2000), 59–76; F. Caccamo, "L'Italia nella corrispondenza tra Masaryk e Benes all'indomani della Prima guerra mondiale", *Clio* XXXII, no. 3 (1996), 489–513.

Europe with an uncertain future, it was much wiser not to have obstacles on its eastern side.[28]

The final negotiations on the eastern border were conducted personally by Carlo Sforza, starting on 7 November 1920 at Villa Spinola, between Santa Margherita Ligure and Rapallo, and lasted for six days. In addition to Carlo Sforza, Giovanni Giolitti and Ivanoe Bonomi represented Italy, and Ante Trumbić, Milenko Vesnić, and Kosta Stojanović participated on behalf of the Kingdom of SCS. Woodrow Wilson's departure from the American presidency and, by extension, from post-war European problems and the Anglo-French pressure on the Yugoslavs to accept Carlo Sforza's "reasonable formulas",[29] induced the Kingdom of SCS to give in to the latest arrangement proposed by Italy and to sign the treaty. The achievement of a final agreement represented a source of great satisfaction for the Giolitti-Sforza government, even diplomatically. After long days of talks between the plenipotentiaries, the Treaty of Rapallo was signed on 12 November, by which Dalmatia, the main object of Italian and Yugoslav claims, was finally largely assigned to the Kingdom of SCS, and Italy renounced it in exchange for sovereignty over Zara, Cres, Lošinj, Lastovo, Pelagosa, control of all Venezia Giulia up to Mount Učka and Nevoso with the Free State of Fiume – the latter being a transitional solution, accompanied by an exchange of letters between Sforza and Trumbić promising the Yugoslavs the possession of Porto Baros. Italy recognized a unitary Yugoslav state, ending its support for separatist movements and accepting Montenegro's integration into the Kingdom of SCS. There was no explicit agreement concerning Albania, but Sforza wanted to pursue collaboration with Belgrade.[30]

The result was not a diplomatic success for everyone, most notably for the Italians inhabiting Dalmatia – neither those who remained in Italy nor those who became part of Yugoslavia – nor for D'Annunzio and the more intransigent nationalists and fascists (although Sforza had repeatedly sought Mussolini's col-

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[28] C. Sforza, *Discorsi parlamentari*, Collana dell'Archivio Storico del Senato della Repubblica, nuova serie 14 (Bologna: il Mulino, 2006), 74, Communications of the Government, Chamber of Deputies, 2nd session of 6 August 1920.

[29] C. Sforza, *L'Italia dal 1914 al 1944 quale io la vidi*, 96.

[30] The text of the Rapallo Treaty is published in A. Giannini, *Documenti per la storia dei rapporti fra l'Italia e la Jugoslavia* (Rome: Istituto per l'Europa orientale, 1934), 36. On the Treaty of Rapallo, see L. Riccardi, "Francesco Salata, il trattato di Rapallo e la politica estera italiana verso la Jugoslavia all'inizio degli anni Venti", *Quaderni giuliani di storia* 2 (1994), 75–91; L. Riccardi, "Le trattative italo-jugoslave per il trattato di Rapallo nel diario di Francesco Salata (20 settembre–5 novembre 1920)", *Storia contemporanea* 1 (1996), 129–149; A. Brogi, *Il trattato di Rapallo del 1920*.

laboration to act as a mediator).[31] The Croatian and Slovenian parties of the Kingdom of SCS were similarly disaffected. Both sides accused their respective national governments of yielding too much ground.

For the Italians of Dalmatia, the agreement represented the renunciation of irredentism and the beginning of abandonment under hostile foreign domination, the sacrifice of minorities in favour of a higher raison d'état. For the Croats, it represented "the betrayal of national rights carried out by the Serbian government in favour of Italy",[32] and the minorities sacrificed there were nothing more than the bridgehead for future Italian penetrations and new attempts at imperialism. The problems associated with its practical application, especially in terms of the eviction from the occupied land and the management of minorities, only ended up exacerbating these feelings on both sides. The respective national governments, on the other hand, hailed the Treaty of Rapallo as the end of a territorial dispute that had only increased internal instability and undermined the international diplomatic balance in the previous months. In his speech approving the Treaty before the Chamber of Deputies, Carlo Sforza affirmed, in fact, that the Treaty of Rapallo was the beginning of a "fruitful and glorious life" and the first step toward "serene Italian influence from the Adriatic to the Aegean and the Black Sea".[33]

The advantages of this treaty were obvious. In previous negotiations, reduced territorial concessions were envisaged for Italy; the city of Zara itself, for example, when it was not proposed as a Yugoslav possession, was presented as a free state under the control of the League of Nations.[34] Now, in addition to the annexation of Zara, a vast hinterland was also secured in Trieste thanks to the border in the Julian Alps that united all of Istria with Italy. The independence of Fiume was also a guarantee for protecting its Italianness. Article VII of the Treaty of Rapallo allowed Dalmatians to opt for Italian citizenship while retaining the right to residency in the Kingdom of SCS, without the obligation to transfer their domicile outside the kingdom and retaining the free use of their

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[31] ASMAE, Carte Sforza, b. 7, incoming and outgoing telegrams about Mussolini. See also the article written by Mussolini on the Treaty of Rapallo in the newspaper *Il Popolo d'Italia*, where he offers a positive assessment of the agreement: B. Mussolini, "Ciò che rimane e ciò che verrà", *Il Popolo d'Italia*, 13 November 1920. For an analysis of Mussolini's attitude, see E. Nolfo, *Mussolini e la politica estera italiana 1919–1933* (Padua: Cedam, 1960), 22–27.

[32] Monzali, *Gli italiani di Dalmazia e le relazioni italo-jugoslave nel Novecento*, 196.

[33] Sforza, *Discorsi parlamentari*, 88, "Approval of the Treaty of Rapallo and annexation to the Kingdom of the territories attributed to Italy", Chamber of Deputies, session of 26 November 1920.

[34] Sforza, *Discorsi parlamentari*, 85.

language and religion. Trumbić was originally against explicitly including this clause in the pact unless Italy guaranteed the same conditions for the Serbs, Croats and Slovenes in its territories. Compared to the treaties for minorities signed at the peace conference, this was a great concession. In exchange, Italy renounced its right to ask for protection for the Italian Dalmatians who had opted for Yugoslav citizenship.[35]

Even Alberto Bergamini, a critical observer of the politics of Giolitti and Sforza, invited Sonnino to consider the positive results of the Treaty of Rapallo after long, inauspicious negotiations. He called this "incomparably better" than the proposals by Wilson, Tardieu, Tittoni, Scialoja, and Nitti, and said it brought relief and satisfaction that the war had ended.[36]

The vast majority of the country was satisfied with the closure, at least apparent and temporary, of the long-standing question of the eastern border. At the international level, the agreement between the two Adriatic rivals strengthened Italy's presence and influence beyond the Adriatic Sea. This confirmed that the sacrifice of its territorial interests would be compensated in a larger picture.

3. *Between the Adriatic and the Danube: Support for the Little Entente*

Sforza's foreign policy, pursued during a favourable international period when the Allies were temporarily out of the spotlight – due to the Anglo-Americans' progressive disinterest in European continental politics and the "Hungarian parenthesis" of French policy[37] – gave Italy an opportunity to emerge as a viable alternative and a point of reference for Danube-Balkan relations.

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[35] Monzali, *Gli italiani di Dalmazia e le relazioni italo-jugoslave nel Novecento*, 175.

[36] S. Sonnino, *Carteggio 1916–1922*, ed. Pietro Pastorelli (Bari: Laterza, 1975), 716–720, d. 519, Bergamini to Sonnino, Rome, 15 November 1920, citation on p. 717. Sonnino's diary also contains comments on the Treaty of Rapallo, in particular on pp. 365–367, on 17 November and 29 December.

[37] G. H. Soutou, "L'insoluble problème hongrois, ou les limites de la puissance française en 1920", communication to appear in the proceedings of the international conference *Des mémoires réconciliées: le Traité de Trianon 90 ans après*, held in Paris, 3 May 2010; G. H. Soutou, "Le deuil de la puissance (1914–1958)". In *Histoire de la diplomatie française*, ed. J.-C. Allain, F. Autrand, L. Bély et al. (Paris: Perrin, 2005), 743–860; G. H. Soutou, "L'ordre européen de Versailles à Locarno", in *1918–1925: Comment faire la paix ?*, ed. C. Carlier and G. H. Soutou, Proceedings of the international conference held in Vincennes, 26–27 November 1999 (Paris: Economica, 2001), 301–331; G. H. Soutou, "L'impérialisme du pauvre: la politique économique du gouvernement français en Europe centrale et orientale de 1918 à 1929. Essai d'interprétation", *Relations internationales* 7 (1976), 219–239. On Italian-French rivalry in Eastern Europe, see E. Serra and J. B. Duroselle, *Italia e Francia dal 1919 al 1939* (Milan: Istituto per gli studi di politica

In June 1920, Czechoslovak protests against Polish terrorism in the Teschen area were accompanied by a sense of discontent with the French presence, which influenced the country's policies. French tutelage became a topic of concern for public opinion and politicians, especially those seeking closer ties with Germany. Italy could benefit from this situation by opposing French imperialism. Communist propaganda also accused Czechoslovak foreign policy of being influenced by France, which was hostile to the Soviets.

In the foreign policy that Eduard Beneš was conducting for Czechoslovakia, i.e., the construction of an anti-Hungarian defence network, the pro-Magyar tendencies of French foreign policy were looked upon with apprehension and created fertile ground for Italy, which could take advantage of it, to find its own space of influence not only in Czechoslovakia but in all the disoriented states that had arisen from the dismemberment of Austria-Hungary or had been enlarged as a result of it. The mounting reports that the Czechoslovak newspapers were alarmed about the secret manoeuvres of France in Hungary, even in support of the House of Habsburg,[38] created in political circles the suspicion that there was a kernel of truth, despite the French public denials and official declarations of support and loyalty to the Czechoslovak Republic and of defense of the Treaty of Trianon and its prompt ratification by Hungary.[39]

For Czechoslovak foreign policy, it was important to have good relations with the Western powers and to monitor Germany's internal and foreign policy and Russia's rebirth for the sake of the European balance of power. For these reasons, Czechoslovakia aimed to restore relations with Poland, understanding and friendship with the Kingdom of SCS and Romania, and good neighbourliness with Austria and, as far as possible, Hungary. Therefore, Minister Beneš's trips to Belgrade and Bucharest at the end of August 1920 had a clear political purpose. The aim was to obtain collective declarations of neutrality in the Rus-

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internazionale, 1981); F. Le Moal, *La France et l'Italie dans les Balkans, 1914–1919. Le contentieux adriatique* (Paris: L'Harmattan, 2006); A. S. Nardelli-Malgrand, *La rivalité franco-italienne en Europe balkanique et danubienne, de la Conférence de la Paix (1919) au Pacte à Quatre (1933): intérêts nationaux et représentations du système européen*, PhD diss., Université de Paris, 2011; F. Dessberg, "Coopération et luttes d'influence entre la France et l'Italie en Europe centrale au lendemain de la Première Guerre mondiale". In *1919–1920. I trattati di pace e l'Europa*, ed. P. L. Ballini and A. Varsori (Venice: Istituto Veneto di Scienze, Lettere e Arti, 2020), 269–287; V. G. Pavlović, "Le conflit franco-italien dans les Balkans 1915–1935. Le rôle de la Yougoslavie", *Balcanica* XXXVII (2006), 163–201.

[38] ASMAE, AP 19–30, Czechoslovakia b. 933, Bordonaro to Sforza, Prague, 6 November 1920.

[39] ASMAE, AP 19–30, Czechoslovakia b. 933, Bordonaro to Sforza, Prague, 19 October 1920.

sian-Polish conflict[40] and political and military understanding against Hungary. While this aim was achieved in Belgrade and the political and military agreements were signed, Bucharest's response was more reserved.[41]

This marked the beginning of the so-called "Little Entente", which was formally established by Czechoslovakia and the Kingdom of SCS with the signing of an official exchange of notes on a military and defensive alliance in Belgrade on 14 August 1920. This alliance was the first step in creating a structure that ideally included the Kingdom of Romania.[42] On the occasion of the ratification of the peace treaties with Hungary, the Czechoslovakian Foreign Minister Beneš sent the Romanian government the text of the Czechoslovakian-Yugoslav defensive alliance, inviting Take Ionescu to formally join this system of alliances. However, he received no more than a verbal confirmation of shared intentions.[43]

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[40] *Außenpolitische Dokumente der Republik Österreich (1918–1938)* (Vienna: Verlag für Geschichte und Politik, 1996) (ADÖ), dd. 3/461–461a, contains the Austrian proposal for neutrality, which also involved Germany, Italy, the Kingdom of SCS and the Czechoslovak Republic.

[41] ASMAE, AP 19–30, Czechoslovakia b. 934, Torretta to Sforza, Vienna, 3 September 1920.

[42] Text of the "Little Entente" Treaty in *The New York Times Current History*, January 1921, p. 73. The text in Italian is published in G. Barié, G. De Leonardis, L. De Robertis and M. Rossi, *Storia delle relazioni internazionali. Testi e documenti (1815–2003)* (Bologna: Monduzzi, 2004), 233. The term "Little Entente" was adopted from a contemptuous reference in the Hungarian newspaper *Pesti Hírlap*, 21 February 1920: P. Wandycz, "The Little Entente: Sixty Years Later", *Slavonic and East European Review* 59, no. 4 (1981), 548–564. On the Little Entente, see *The Little Entente: Nations of the New Alliance*, *The New York Times Current History*, October 1920, 79–81; S. Huddleston, "The Little Entente and Central Europe", *The Contemporary Review*, (July 1920), 620–627; M. Toscano, "Le origini della Piccola Intesa". In M. Toscano, *Pagine di storia diplomatica contemporanea* (Milan: Giuffrè, 1953), 4; N. Iordache, *La Petite Entente et l'Europe* (Geneva: Institut universitaire de hautes études internationales, 1977); R. Machray, *The Little Entente* (New York: Howard Fertig, 1970); ASMAE, Czechoslovakia b. 934, Galanti to Sforza, Belgrade, 16 and 17 August 1920; *Papers and Documents Relating to the Foreign Relations of Hungary* (Budapest: Hungarian Ministry for Foreign Affairs, 1939–1946) (FRH), vol. I, d. 602, Count Teleki to Mr Praznovszky, Budapest, 23 August 1920; *Documents diplomatiques relatifs aux conventions d'alliance conclues par la République tchécoslovaque avec le royaume des Serbes, Croates et Slovènes et le royaume de Roumanie. Décembre 1919–août 1921* (Prague: Ministère des Affaires étrangères, 1923). The Little Entente in French diplomatic documents: DDF, 1920, II, dd. 17–18–102–204–268–355–384–392–463–476; DDF, 1920, III, dd. 36–44–200–433; DDF, 1921, I, dd. 26–83–105–107–437–454–465.

[43] ASMAE, AP 19–30, Czechoslovakia b. 933, Tosti di Valminuta to Sforza, Bucharest, 28 August 1920. On Romania in the Little Entente, see Măturii. *Desăvîrşirea unităţii naţional-statale a poporului român. Recunoaşterea ei internaţională 1918. Documente interne*

Ionescu's willingness to conclude a formal agreement was not shared by King Ferdinand of Romania and General Alexandru Averescu. In their opinion, Romania and Czechoslovakia had a definite interest in maintaining cordial and intimate relations, they had many common interests and therefore the exchange of ideas was useful, but it was quite another thing to conclude an agreement or an alliance in Europe's precarious climate, in which it was impossible to make predictions about events and political groupings even in the near future. The Romanian general then reported to Beneš that Romania would not conclude agreements with the Kingdom of SCS until the latter's dispute with Italy was resolved, and Beneš was satisfied with this answer. The King of Romania declared that he cared more about Italy's friendship than that of the Kingdom of SCS, so it was desirable to brighten the Italian-Yugoslav horizon.[44]

While the Treaty of Rapallo taking its shape, Carlo Sforza reported sincere sympathy for Italy from the representatives of Romania and Czechoslovakia, which was good news for his Adriatic policy.[45] In a telegram dated 20 November 1920, the Minister Plenipotentiary in Prague, Antonio Chiaromonte Bordonaro, reported to Sforza the satisfaction expressed in a conversation between Beneš and Take Ionescu for the Italian government's understanding of the reasons for the creation of the Little Entente.[46] This would fuel Hungary's and France's suspicions of Italy's involvement in creating an anti-Hungarian front, which was created precisely when France sought closer relations with Hungary, thus acting against France.[47]

și externe (Bucharest: Editura Științifică și Enciclopedică, 1986) (Mărturii 1918), vol. VI, February 1920 – December 1920, dd. 871–902–903–904–905–913–914.

[44] ASMAE, AP 19–30, Czechoslovakia b. 934, Martin Franklin to Sforza, Bucharest, 9 September 1920; ASMAE, AP 19–30, Romania b. 1504, Martin Franklin to Foreign Ministry, Bucharest, 9 September 1920.

[45] Archivio Centrale dello Stato, Rome (ACS), Carte Sforza, b. 1, f. 1, telegram leaving for Prague, Sforza to Bordonaro, 31 July 1920; ASMAE, AP 19–30, Czechoslovakia b. 934, departing telegram, Sforza to the Italian Legation in Belgrade and Prague, 15 August 1920; Tosti di Valminuta to Sforza, Bucharest, 25 August 1920; ASMAE, AP 19–30, Romania b. 1504, Martin Franklin to Foreign Ministry, Bucharest, 13 May, 27 July and 7 August 1920. From a conversation with his Romanian colleague, Imperiali reported Romania's feeling of intimacy and cordiality towards Italy: *Ibid*., Imperiali to Foreign Ministry, London, 15 July 1920. Finally, in Romanian circles, the conclusion of the Treaty of Rapallo was hailed as a great Italian diplomatic success: *Ibid*., Martin Franklin to Foreign Ministry, Bucharest, 18 November 1920.

[46] ACS, Carte Sforza, b. 1, f. 1, telegram arriving from Prague, Bordonaro to Sforza, 20 November 1920.

[47] *Documents diplomatiques français sur l'histoire du Bassin des Carpates (1918–1932)* (Budapest: Institut des sciences historiques de l'Académie hongroise des sciences, 1993)

Austria was also repeatedly invited to formally join the Little Entente, which it refused, while maintaining solidarity with it. The hypothesis of a joint military intervention against Hungary, which Czechoslovakia, the Kingdom of SCS and Romania said they would be willing to undertake in case of danger, made the Austrian government particularly hesitant. Additionally, the pan-Slavist policies pursued by the Czechoslovak and Yugoslav governments did not align with Austria's own interests.[48] This also led to the exclusion of the formation of the corridor, a potential juncture between the Czechoslovak and Yugoslav forces, which Italy feared. The Austrian Chancellor Karl Renner explicitly assured Italy of this.[49] However, Austria used the Little Entente as a veiled threat against Hungary. Renner believed Hungary should decide what kind of relations it wanted with Vienna: continue hostilities over western Hungary or seek détente and a common solution, for which Austria believed Italy could mediate.[50] It was important for Hungary to maintain the advantages of a neutral, friendly Austria and avoid surrounding herself with enemies.

The Little Entente was thus born from the developments of the troubled summer of 1920, when the Soviet-Polish war and the French manoeuvres in Hungary anticipated a scenario of threatening isolation for the Czechoslovak

(CARPATES), vol. III, d. 67, Fouchet to Millerand, Budapest, 27 August 1920; here is reported a comment by the Hungarian Foreign Minister, Kanya, who accused Italy of being "the instigator of Chancellor Renner's trip to Prague and that of Mr Beneš to Belgrade and Bucharest to make the encirclement of Hungary definite", p. 82. See also d. 72, Fouchet to Millerand, Budapest, 29 August 1920, p. 87.

[48] ASMAE, AP 19–30, Czechoslovakia b. 934, Torretta to Sforza, Vienna, 3 September 1920.

[49] ASMAE, AP 19–30, Czechoslovakia b. 934, Torretta to Sforza, Vienna, 14 August 1920.

[50] ASMAE, AP 19–30, Czechoslovakia, b. 934, Torretta to Sforza, Vienna, s.d. (but certainly before the first ten days of September 1920 because in the subsequent telegram from Budapest dated 13 September 1920 Cerruti in conversation with Teleki reports Renner's arguments contained in Torretta's telegram); ACS, Carte Sforza, b. 1, f. 1, Cerruti to Sforza, Budapest, 13 September 1920; FRH, vol. I, d. 166, Dr. Gratz to Count Somssich, Vienna, 5 March 1920; d. 649, Notes of the Minister for Foreign Affairs, Count Teleki, of his conversations with the High Commissioner of Italy in Budapest, Mr. Cerruti, Budapest, 12 September 1920, p. 628. This note reports Cerruti's response to the Hungarian requests for clarification about Italy's involvement in the formation of the Little Entente. The Hungarian government believed that Italy had helped the achievement of the Czechoslovak-Yugoslav agreement; Cerruti, authorized by Sforza, had sent a denial to this Hungarian declaration, adding, however, that he was aware of it and had explained the points of which the agreement was composed, in particular those relating to the Hungarian ratification of the Treaty of Trianon and the prohibition of a Habsburg restoration on the Hungarian throne.

Republic, from which the alliance with the Kingdom of SCS and Romania represented a potential escape route.

Although Hungary was mentioned in the first article of the treaty, the political leaders of the Little Entente provided a different explanation of the purpose and nature of the alliance. After his trip to Belgrade and Bucharest, Beneš issued the following statement:

> This Entente is aimed not merely against all attempts at reaction which might menace the new States; it is not simply a defensive alliance assuring integrity and independence to the three States concerned, but it is, above all, a positive agreement to facilitate a return to normal economic conditions, to regularise the exchanges between these countries, which have been so severely tried by the war, and to establish a new order of things in accordance with the new political constitution in Central Europe.[51]

Beneš wanted to reduce the "negative" aspects of the agreement on the international level, meaning the containment of Hungary, and to highlight the ideological underpinnings of the new alliance system and its economic mission. He said the Little Entente was important for fostering economic ties between Prague, Belgrade, and Bucharest. This was the first step toward post-war European reconstruction. However, the three states' cooperation was based on a single common denominator: the fear of Hungarian revisionism and the Habsburg restoration. Czechoslovakia did not address Romania's and the Kingdom of SCS's other problems, such as the Russian and Italian issues. In a precarious geopolitical climate, the Little Entente provided security against other inimical political and economic groupings, as well as the primary bulwark against the Hungarian threat.

Secretary General of the French Ministry of Foreign Affairs Maurice Paléologue judged the Czechoslovak-Yugoslav agreement to be of little importance:

> Paléologue, however, does not attach much importance to this in view of the fact that the Serbs are immobilised, being economically dependent on France and threatened on three sides by the Bulgarians, Albanians and Italians. He denied that Rumania could have acceded to this agreement, since that would be contrary to her policy inaugurated toward Hungary. According to him, Beneš received a non-committal reply in Bucharest to the effect that the project is interesting but would be of real value only if Bulgaria, Greece and Poland would also join.[52]

The change in French government leadership would soon change the policy towards the Little Entente. With Paléologue's resignation and Philippe

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[51] "The Little Entente: Nations of the New Alliance", *The New York Times Current History*, October 1920, p. 80.

[52] FRH, vol. I, d. 618, p. 606, Mr. Praznovszky to Count Teleki, Paris, 28 August 1920.

Berthelot's return to the Quai d'Orsay, Paris began to reorient its policy and eventually gave Beneš's initiative a belated blessing.

As previously mentioned, Italy could benefit from the months of French estrangement, particularly following the signing of the Treaty of Rapallo. After the Italian-Yugoslav agreement was achieved, Italy's relations with the Danube-Balkan countries improved significantly. Italy's main concern in that area was the potential consolidation of the Czechoslovak-Yugoslav alliance against Italy. With the ongoing dispute with the Kingdom of SCS over possession of Dalmatia and the delineation of the eastern border, Italy feared that the Czechoslovak Republic could intervene militarily to defend South Slav interests if a peaceful resolution could not be reached. On several occasions, Italian diplomatic staff stationed beyond the Adriatic were instructed to ascertain the intentions behind emerging agreements.[53] During his stay in Portorož, the Czechoslovak Prime Minister Vlastimil Tuszar in conversation with the Trieste financier, his friend, Camillo Castiglioni – appointed by Sforza to start surveys among the Czechoslovaks to understand the level of solidarity with the Yugoslavs – gave his word of honor that Czechoslovakia was working with Yugoslavia and Romania only to reach a defensive treaty against Hungary and the agreement would guarantee the territorial integrity of the three countries solely and exclusively with regard to Hungary. If, for example, Slovakia had risen up, there would have been no *casus belli*, but if Hungary had helped the Slovaks, then the Kingdom of SCS and Romania would have been bound to intervene to help the Czechs. Under no circumstances, therefore, would Czechoslovakia intervene to help the Kingdom of SCS in the event of a conflict with Italy.[54] The détente produced by the signing of the Treaty of Rapallo – which followed the other two important acts for the area, namely the denunciation of the Tittoni-Venizelos agreements in July 1920 and the end of the Italian occupation of Vlora in August 1920 – eliminated the possibility of an alliance against Italy between Czechoslovakia and the Kingdom of SCS, marking a milestone in Carlo Sforza's political career. In the eyes of outside commentators, he seemed to have finally taken control of Danube-Balkan Europe, after a year of contention with France.[55] Although they

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[53] ACS, Carte Sforza, b. 1, f. 1, Sforza, 31 July 1920; ASMAE, AP 19–30, Czechoslovakia, b. 933, Bordonaro to Sforza, Prague, 2 September 1920; ASMAE, AP 19–30, Czechoslovakia, b. 934, Castiglioni to Sforza, Trieste, 28 July 1920; Tosti di Valminuta to Sforza, Bucharest, 25 August 1920; Martin Franklin to Sforza, Bucharest, 9 September 1920.

[54] ASMAE, AP 19–30, Czechoslovakia, b. 934, Castiglioni to Sforza, Trieste, 28 July 1920.

[55] Comment of the Austrian representative in Prague: Österreichisches Staatsarchiv, Archiv der Republik, Neues Politisches Archiv (1919–1938), Wien (OeSTA, ADR,

were linked by agreements that declared their shared intent and coordinated international action, the profound differences between Czechoslovakia and the Kingdom of SCS could hardly transform the agreement into a real friendship. This sentiment was expressed by Tuszar in his conversation with Sforza before the official announcement of the Czechoslovak-Yugoslav alliance. He stated that the relations between the two countries were more apparent than real and that there was a clear interest in maintaining economic and cultural relations. However, he made it clear that Czechoslovakia had no intention of following the Kingdom of SCS and supporting it in its ventures, with an obvious reference to the possibility of conflict with Italy.[56] The two newly formed post-Versailles countries were united by their opposition to any form of reconstitution of the former Danube Monarchy, especially the return of any member of the House of Habsburg to the throne of Hungary. This opposition pushed Romania to move closer to the alliance.

Italy showed the two allies from the Little Entente that it could be a concrete point of reference in their anti-Hungarian policy and the only real guardian of the interests and fears of Eastern European countries against the possibility of a Habsburg dynasty member being restored to the Hungarian throne. This was another point in favour of Carlo Sforza's policy. Concurrently with the Treaty of Rapallo, he signed the Anti-Habsburg Convention with the Yugoslav government. With the first three articles of the convention, "in order to ensure the benefits of the peace obtained at the price of so many sacrifices with the victory over the Austro-Hungarian Monarchy", the two governments committed themselves to 1) ensuring the strict observance of the peace treaties signed at Saint-Germain and Trianon, 2) taking, by common agreement, the political measures necessary to prevent the restoration of the House of Habsburg to the thrones of Austria and Hungary, and 3) supporting each other by providing the most appropriate diplomatic support for this purpose. They also agreed to monitor any activity directed against their mutual security from both Austrian and Hungarian territories and to keep in close contact by exchanging information. The Italian Government declared its satisfaction with the agreement between

NPA), Karton 48, *Originalberichte der österreichischen Gesandtschaften und Konsularämter 1918 bis 1938*, Prague, 13 January 1921. See also F. Fejtö, "La Petite Entente, la France et Beneš", *Vingtième Siècle. Revue d'histoire*, 29 (1991), 11–15.

[56] ASMAE, AP 19–30, Czechoslovakia, b. 934, Sforza to the Italian Legation in Belgrade and Prague, Rome, 15 August 1920. The differences between Czechoslovakia and Yugoslavia and the apparent friendship were also reported by the Austrian representative in Prague in conversation with Czech journalists: OeSTA, ADR, NPA, K. 48, *Originalberichte der österreichischen Gesandtschaften und Konsularämter 1918 bis 1938*, Prague, 15 February 1921. On Beneš's trip to Rome, see also *Ibid*., 13 and 26 January 1921.

the Kingdom of SCS and the Czechoslovak Government. It also made sure that the Anti-Habsburg Convention was brought to the Czechs' attention. The two governments would consult each other before putting new agreements into effect.[57] Thus, Italy was involved "without binding it, in the complex of present and future agreements between the new nationalities".[58] After receiving confidential notice of the signing of the Treaty of Rapallo,[59] Beneš was invited to visit Rome, and the trip was scheduled for the end of January 1921. Postponed for 1 February, his four-day stay was mainly used to discuss commercial issues, which would shortly lead to the signing of a commercial treaty in March,[60] but the meeting also had a clear political aspect. With the Sforza-Beneš exchange of notes on 8 February 1921, the commitments contained in the Anti-Habsburg Convention, to which Czechoslovakia now expressly adhered, were reaffirmed. Foreign policy positions and interests and the application of peace treaties were discussed, without reaching a political agreement in accordance with Beneš's preference.[61] A conference of the successor states of Austria-Hungary was convened in Rome on 7 April 1921 mainly to address economic issues.

The anti-Habsburg convention was also the instrument with which Sforza tried to set up a dialogue and find common ground with Poland. After the Peace of Riga (18 March 1921), which had ended the Russian-Polish conflict in which Italy had maintained a neutral position,[62] Sforza tried to include Poland in his policy toward the Little Entente, but Poland was unresponsive, considering Italy to be much more sympathetic to Czechoslovakia. Poland also

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[57] The text of the Convention is published in Barié, De Leonardis, De Robertis, Rossi, *Storia delle relazioni internazionali. Testi e documenti (1815–2003)*, 229. For his analysis see M. G. Melchionni, *La convenzione antiasburgica del 12 novembre 1920* (Milan: Giuffrè, 1972).

[58] Melchionni, *La politica estera di Carlo Sforza*, 559.

[59] ASMAE, AP 19–30, Czechoslovakia, b. 933, Bordonaro to Sforza, Prague, 16 November 1920; C. Sforza, *Discorsi parlamentari*, 93.

[60] The trade agreement between Italy and Czechoslovakia was signed in Rome on 23 March 1921. See D. Bolech, *Alle origini di un'inimicizia*, 121–122.

[61] D. Bolech Cecchi, *Alle origini di un'inimicizia*, 119; CARPATES, vol. III, d. 198, Count Sforza, Minister of Foreign Affairs of Italy, to M. Benes, Minister of Foreign Affairs of Czechoslovakia, Rome, 8 February 1921.

[62] On the Russian-Polish conflict: F. Anghel, "The Premises of the Romanian-Polish Alliance on the Backdrop of the Military Conflict between Poland, Ukraine and Soviet Russia (1919–1921)", *Annales de l'Université "Valahia" Târgoviște, Section d'Archéologie et d'Histoire*, X, 2 (2008); J. Borzęcki, *The Soviet-Polish Peace of 1921 and the Creation of Interwar Europe* (New Haven–London: Yale University Press, 2008); N. Davies, *White Eagle and Red Star: The Polish-Soviet War, 1919–1920 and "the Miracle on the Vistula"* (London: Pimlico, 2003).

believed that a Habsburg restoration limited to Hungary would not be threatening. A new attempt was made when the Polish-German dispute over Upper Silesia resurfaced, which created friction with Rome over the Italian support shown to German demands, especially after the favorable outcome of the plebiscite held on 20 March 1921.[63] The Polish insurrections in Upper Silesia led Sforza to again propose an agreement concerning fending off the Habsburgs: Italy would support Poland in the question of eastern Galicia if Poland joined the anti-Habsburg agreement. This time, also thanks to the diplomatic efforts of the Polish minister plenipotentiary in Rome, Konstantin Skirmunt, the Polish side showed itself willing to accept the proposal, but the fall of the Giolitti-Sforza government and the disinterest of the subsequent government led by Ivanoe Bonomi with Pietro Tomasi della Torretta as minister for foreign affairs, little inclined to conclude political collaboration agreements with Poland, blocked the signing of the prepared treaty.[64]

The two attempts to restore the former king and emperor Charles of Habsburg to the Hungarian throne in April and October 1921 were a test of the political climate in the aftermath of the Treaty of Rapallo. The joint action carried out by the Czechoslovak, Yugoslav, Romanian, Italian, French and British governments to oppose the restoration and, in particular, the Italian commitment to remove the royal family from Switzerland, where it was in exile, earned Carlo Sforza comments of satisfaction and congratulations from the governments of the Little Entente. They hoped that their collaboration would continue in the future and that the agreements reached would provide a solid foundation for overcoming trivial details and considering the most important common interests.[65]

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[63] On the question of Upper Silesia: W. Grosch, *Deutsche und polnische Propaganda während der Volksabstimmung in Oberschlesien 1919–1921* (Dortmund: Forschungsstelle Ostmitteleuropa, 2003); T. K. Wilson, "The Polish-German Ethnic Dispute in Upper Silesia, 1918–1922: A Reply to Tooley", *Canadian Review of Studies in Nationalism*, XXXII (2005), 1–26; T. H. Tooley, "German Political Violence and the Border Plebiscite in Upper Silesia, 1919–1921", *Central European History*, XXI (1988), 56–98; T. H. Tooley, *National Identity and Weimar Germany: Upper Silesia and the Eastern Border, 1918–1922* (Lincoln–London: University of Nebraska Press, 1997).

[64] On Italian-Polish relations: L. Monzali, *Francesco Tommasini e la rinascita della Polonia indipendente* (Rome: Accademia Polacca delle Scienze, 2018).

[65] ASMAE, Carte Sforza, b. 7, Sforza to the Italian Legation in Belgrade, Rome, 13 April 1921; *Ibid.*, 13 May 1921. On Charles's attempts at restoration: A. Gottsmann, *Karl I. (IV), der Erste Weltkrieg und das Ende der Donaumonarchie* (Vienna: Publikationen des Historischen Instituts beim Österreichischen Kulturforum in Rom, Abhandlungen 14, 2007); E. Kovács, *Politische Dokumente zu Kaiser und König Karl I. (IV.) aus internationalen Archiven* (Cologne–Vienna: Böhlau Verlag GmbH & Cie, 2004); *Docu-*

The trivial details (or "small stitching", to render the phrase verbatim) to which Sforza refers in the telegram are certainly to be understood as the problems relating to the application of the Treaty of Rapallo, which were still very much felt in Dalmatia.

Sforza's Adriatic policy was harshly criticised by the Dalmatian nationalists for being too pro-Yugoslav. This criticism was exploited by the right-wing government and the fascists to argue against the policies of Giolitti and Sforza. Also criticised by socialist and Catholic circles for its anti-German and pro-French positions, Carlo Sforza's foreign policy became increasingly unpopular with the Italian public and political parties. After a long parliamentary speech in defence of his work in the Adriatic and the Mediterranean, Sforza had to note the lack of confidence expressed in him by the Chamber of Deputies, and this prompted Giolitti to offer the resignation of his government on 27 June 1921.[66]

Sforza's pro-Yugoslav policy suffered a setback under the subsequent Italian government, led by Ivanoe Bonomi with Pietro Tomasi della Torretta at the Foreign Ministry (July 1921–February 1922), who questioned the validity of the Sforza-Trumbić letters on Porto Baros, straining relations with the Kingdom of SCS and Czechoslovakia. Carlo Schanzer, the foreign minister of the last liberal government led by Luigi Facta (February–October 1922), resumed talks with the Kingdom of SCS, leading to the Santa Margherita agreements, which were ratified by the fascist government of Benito Mussolini. Mussolini's early foreign policy reflected continuity with previous liberal governments, inheriting from Carlo Sforza the strategic safeguarding of Albanian independence, maintaining a Mediterranean presence, and fostering friendship with the Kingdom of SCS. However, starting from the late 1920s, Mussolini adopted an increasingly imperialist stance, mirroring the fascistisation of his internal policy, and Sforza moved progressively away from diplomatic circles.[67]

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ments diplomatiques concernant les tentatives de restauration des Habsbourg sur le trône de Hongrie, août 1919 – novembre 1921, République tchécoslovaque, Ministère des Affaires étrangères, Prague, 1922.

[66] Giolitti, *Discorsi parlamentari*, Chamber of Deputies, "Resignation of the Last Giolitti Ministry", Session of 27 June 1921, p. 1875.

[67] On fascist foreign policy: G. Rumi, *Alle origini della politica estera fascista 1918–1923* (Bari: Laterza, 1968); G. Carocci, *La politica estera dell'Italia fascista 1925–1928* (Bari: Laterza, 1969); E. Collotti, *Fascismo e politica di potenza. Politica estera 1922–1939* (Milan: La Nuova Italia, 2000); G. Salvemini, *Mussolini diplomatico (1922–1932)* (Bari: Laterza, 1952); E. Di Nolfo, *Mussolini e la politica estera italiana (1919–1933)* (Padua: Cedam, 1960); A. Cassels, *Mussolini's Early Diplomacy* (Princeton: University Press, 1970); R. De Felice, *Mussolini il duce. Vol. I: Gli anni del consenso, 1929–1936* (Turin: Einaudi, 1974); R. De Felice, *Mussolini il duce. Vol. II: Lo Stato totalitario 1936–1940* (Turin: Einaudi, 1981); H. J. Burgwyn, *Il revisionismo fascista. La sfida di Mussolini alle grandi po-*

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Abuses against Serbs in the Districts of Otočac and Brinje in World War II with a Special Focus on Religious Conversions**

Abstract: The text brings an overview of the abuses against Serbs in the districts of Otočac and Brinje, focusing on religious conversion in this area. It draws on archival sources, secondary literature, and verbal witness accounts. After a general introduction about the attitude of the Independent State of Croatia (NDH) toward the Serbs, the author offers information on the mistreatment of Serbs in the Otočac area. He then discusses the position of the Roman Catholic Church on religious conversion, especially conversion from Orthodoxy to Roman Catholicism in the territory of the Diocese of Senj-Modruš and 70 persons who requested religious conversion between May and July 1941. Finally, he recounts the fate of Orthodox churches in the Otočac area and the attitude toward the religion of the Serbs in Lika under the socialist regime as a result of Serbian suffering during World War II.

Keywords: Serbs, Lika, Otočac, Brinje, World War II religious conversion.

The Attitude of the Ustaše Regime toward Serbs in NDH

In 1941, the religious composition of NDH was as follows: out of a total population of 5,655,750, there were 2,993,335 or 52.93% Roman Catholics, 1,809,613 Orthodox (31.99%), 772,794 Muslims (12.78%), 59,281 evangelicals (1.05%), and 32,372 Jews (0.57%).[1] The Ustaše project of creating an exclusivist Croat nation-state excluded Serbs, Jews, and Roma, going as far as to posit their

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[1] The calculation is based on the Yugoslav population census of 31 March 1931, with the birth rate added – R. Landikušić, ed., *Priručnik o političkoj i sudbenoj podjeli Nezavisne Države Hrvatske: sa abecednim popisom občina-gradova-kotareva, te popisom i ustrojstvom svih državnih ureda-ustanova i škola po njihovim sjedištima u Nezavisnoj Državi Hrvatskoj* (Zagreb, 1942), 13. The population figures vary in other publications of the time.

biological extinction. Whereas in the resolution of the "Jewish question," they followed their role model, the racial policy of Nazi Germany, the resolution of the "Serbian question" was specific to the NDH. The planned extermination of Serbs – whom the Ustaše characterized, in terms of religion, as Greek easterners, and in terms of race, as akin to the Jews and Roma – began immediately after the establishment of the NDH, with the promulgation of a string of laws that would serve as a strategic lever of the extinction policy.

On the very first day of the new state's existence, Slavko Kvaternik expelled Serbs, Jews, and Roma from public service. The only exception was made for Pavelić's personal friends. The first regulation to be passed by the Poglavnik, Dr. Ante Pavelić, was the Law on the Protection of the People and the State, issued on 17 April 1941, a copy of a similar German law from February 1933. It declared that "whoever in any way does or has done harm to the honor and vital interests of the Croatian nation or who endangers in any way the existence of the Independent State of Croatia or its government authorities, shall be considered guilty of high treason, even if his act was but a mere attempt". The second article added that acts of treason were "punishable by death".[2] With this, Pavelić secured a very broad field for retroactively punishing those who he believed could in any way hamper the new regime. On the same day, the first People's Court began operating in Zagreb, with such courts soon organized in other larger towns in the NDH.[3] Those "people's courts" had a broad scope and passed several hundred convictions daily. To be charged with grand treason, it was enough for someone to privately say a few words against the Poglavnik or the newly established state. A month later, the regime also introduced courts-martial.[4] There were few differences between the people's courts and the courts-martial. The first mobile court-martial was established in Zagreb on 24 June 1941 and then in Banja Luka, Bihać, Brčko, and Derventa. Mobile courts-martial had jurisdiction in the entire territory of the NDH.[5] On 25 April 1941, the Law on the Prohibition of the Cyrillic Alphabet in the Territory of the NDH was passed. Concurrently, the regime launched an extensive campaign of changing the names of streets and settlements and, soon after that, cutting out some words from daily usage.

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2 *Narodne novine* 4 (17 April 1941), 2.

3 People's courts were also established, for instance, in Banja Luka and Karlovac. *Narodne novine* (8 May 1941), *Narodne novine* (9 May 1941).

4 *Narodne novine* 32 (20 May 1941), 1. *Zbornik zakona i naredaba NDH* 1, 152 (1941), 104–105.

5 *Narodne novine* 58 (24 June 1941), 2. *Zbornik zakona i naredaba NDH* 1, 275 (1941), 196.

The Law Concerning Nationality,[6] passed on 30 April 1941, declared that a citizen of NDH could only be a person "who has proven by his conduct that he did not engage in activities against the liberation efforts of the Croatian people and who is ready and willing to serve faithfully the Croatian nation". On the one hand, this law contained a clause stating that a national of the NDH must be of Aryan origin, which essentially targeted Jews and Roma; on the other hand, it allowed for an arbitrary interpretation of one's anti-Croatian sentiments in the Kingdom of Yugoslavia, meaning that anyone could be accused of anti-state activities and denied citizenship. On 3 May, the Law on Religious Conversion was passed, replacing all existing legislation for converting from one religion to another – to convert, one had to apply to the authorities and meet the religious requirements of the religious community one wanted to join, which essentially gave the state complete control over would-be converts.[7] Early June saw the promulgation of a directive banning all Serbian-confessional local schools and nurseries;[8] in mid-July, the phrase "Serbian Orthodox faith" was banned and replaced by the phrase "Greek Eastern faith".[9] The use of the Julian calendar was forbidden in the territory of the NDH in December.[10]

Besides the legislation they passed, the Ustaše used the press and public gatherings to disseminate propaganda against Serbs, making their position in society even more difficult. Immediately after the formation of the NDH, the regime began dismissing Orthodox public servants from the bureaucratic apparatus and state-controlled companies. Thus, the Ustaše pursued a policy of final solutions for Jews and Roma, emulating the Nazi ideological matrix; however, the attitude toward Serbs was an idiosyncrasy specific to the Ustaše, even though the instruments and methods of terror they used were not significantly different.

In the book *Ljudski gubici Hrvatske 1941–1945. godine* [Human Losses in Croatia 1941–1945], Igor Graovac and Dragan Cvetković included tables specifying the national composition of the casualties by region. During World War II, 17,465 Serbs from Lika (16.6% of Lika's total Serbian population) were killed. The scope of the atrocities committed against Serbs in the NDH in 1941 is aptly illustrated by the data on the civilians killed in the districts with an absolute or relative Serbian majority or a significant presence. Serbs constituted an overwhelming majority of the civilians killed in those districts. The table below

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6 *Narodne novine* (1 May 1941). *Zbornik zakona i naredaba NDH* 1 (1941), 42.

7 *Narodne novine* (4 May 1941).

8 *Novi list* 55 (23 June 1941), 10. *Narodne novine* 56 (21 June 1941).

9 *Narodne novine* 80 (19 July 1941).

10 *Narodne novine* (4 December1941).

includes all districts in Lika except Otočac and Brinje, which will be discussed separately in this text.

Table I. Civilian deaths in the districts of Lika

District	Population in 1931	Orthodox population in 1931	Population in 1941 (the census result of 1931 was increased to reflect the birth rate)	Civilian deaths in 1941	Percentage of civilian deaths in 1941 among the district's total population in 1941	Civilian deaths 1941–1945 and percentage of the district's total population in 1941
Korenica and Udbina[12]	26,458	20,943 (79.15%)	28,839	1,429	4.95%	3,193 (11.07%)
Donji Lapac[13]	16,554	15,047 (90.89%)	18,043	890	4.93%	1,388 (7.69%)
Gračac[14]	27,859	19,818 (71.13%)	30,366	971	3.19%	1,601 (5.27%)
Gospić and Perušić[15]	53,820	19,845 (36.83%)	58,663	3,217	5.48%	4,740 (8.08%)

The intensity and scope of the pogrom of Serbs in the first year of the Ustaše regime are indirectly attested by the civilian deaths of 1941 compared to the total civilian casualties in those districts during the entire war (1941–1945): districts of Korenica and Udbina 44%, district Donji Lapac 64%,[15] district Gračac 61%,[16] and districts Gospić i Perušić 68%.[17] The name lists of the victims compiled for these districts show that they were mostly Serbs and predominantly civilians.

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[11] Đ. Zatezalo ed., *Kotar Korenica i kotar Udbina u NOB i socijalističkoj izgradnji* (Karlovac: Historijski arhiv u Karlovcu, 1979), 974.

[12] Đ. Zatezalo ed., *Kotar Donji Lapac u narodnooslobodilačkom ratu 1941–1945* (Karlovac: Historijski arhiv u Karlovcu, 1985), 1108–1109.

[13] Đ. Zatezalo ed., *Kotar Gračac u narodnooslobodilačkom ratu 1941–1945* (Karlovac: Historijski arhiv u Karlovcu, 1984), 895.

[14] Đ. Zatezalo ed., *Kotar Gospić i kotar Perušić u narodnooslobodilačkom ratu 1941–1945* (Karlovac: Historijski arhiv u Karlovcu, 1989), 982–983.

[15] Zatezalo, *Kotar Donji Lapac u narodnooslobodilačkom ratu*, 1108–1109.

[16] Zatezalo, *Kotar Gračac u narodnooslobodilačkom ratu*, 895.

[17] Zatezalo, *Kotar Gospić i kotar Perušić u narodnooslobodilačkom ratu*, 982–983.

Serbian Casualties in 1941 in the Area of Otočac and Brinje

The districts of Brinje and Otočac are in the northwestern part of Lika. They had a combined territory of 1,117 square kilometers, and both districts bordered the districts of Novi and Senj in the west, Ogulin in the north, Korenica in the east, and Perušić in the south. According to the population census of 1931, the Brinje district had 15,991 inhabitants, including 4,740 of the Orthodox faith. The Otočac district had 33,688, including 16,075 Orthodox.[18] The Orthodox settlements in the districts of Brinje and Otočac were Vodoteč, Prokike, Rapain Klanac, Brlog, Drenov Klanac, Dabar, Glavace, Škare, Staro Selo, Podum, Doljani, Srpsko Polje, Ponori, Gorići, Zalužnica, Vrhovine, Gornje Vrhovine, Turjanski, Gornji Babin Potok, Donji Babin Potok, and Rudopolje. Žuta Lokva and Brloška Dubrava, as well as the town of Otočac, had a mixed Serbo-Croatian population. After the short-lived April War, the Ustaše and Italian forces entered the territory of Otočac. The Italians stationed their troops at all important checkpoints and roads in the Gacka Valley. The highest organ of civilian and military authority in Lika became the Great County (*velika župa*) of Gacka and Lika, with its seat in Gospić, which included the Otočac district. The district of Brinje became part of the Great County of Vinodol and Podgorje, whose center was Senj. Besides these, the Great County of Gacka and Lika included the districts of Gospić, Perušić, Udbina, and Gračac, whereas the Lika districts of Korenica and Donji Lapac were integrated into the counties of Krbava and Psat, whose seat was Bihać. From the occupation of 14 April to the Treaties of Rome of 18 May 1941, the Italians held military and civilian authority in the territory of Lika. From the Treaties of Rome to 26 August 1941, the territory of Lika was the second demilitarized zone. In this stage, the Italians had only military authority in Lika, ceding civilian authority to NDH organs. This essentially gave the Ustaše a free hand to begin their mass crimes.

The declaration of the establishment of the NDH caught the Ustaše in the territory of Otočac in the woods around Švica and Prozor. They were deserters from the April War, and their leader was a student from Ličko Lešće called Delko Bogdanić. The organs of the Ustaše movement and civilian organs were established in Otočac on 11 April. Krunoslav Lokmer became the chief of the Ustaše camp (*logornik*) and Drago Žubrinić his deputy. The Ustaše also took control of Brinje on 11 April. As soon as they took power in the territory of those two districts, the Serbs who worked in public service were let go. A people's court was established in Gospić on 2 May 1941, followed by a court-

[18] "Prisutno stanovništvo po veroispovesti i maternjem jeziku, popis 1931", Republički zavod za statistiku, accessed December 23rd 2024, https://pod2.stat.gov.rs/ObjavljenePublikacije/G1931/pdf/G19314001.pdf.

martial on 27 May 1941.[19] Along with those courts, the Ustaše in Lika spread hate against Serbs in their speeches at rallies in some towns. Mile Budak was one of the Ustaše leaders from Lika who held anti-Serbian speeches in Lika's villages and towns. For instance, in Lovinac, on 31 May 1941, he issued a call to arms against the Serbs to his compatriots after recently having done the same in Gospić. One of the more ceremonious speeches was delivered in Otočac on 2 June 1941. It was attended by Jure Francetić, who received the main speaker Jurica Frković, Minister of Forestry in the NDH government. Jurica Frković thanked the inhabitants of Otočac for having successfully harbored the Ustaše under the former regime, describing this effort as a mother's tender care.[20] The first stage of terror in Lika followed in April and May 1941 when some were arrested – mostly men who were taken to prisons and then largely executed at secret locations. These victims were distinguished and wealthier individuals. Later, in the second stage, the terror campaign spread to all men between 16 and 60 years of age and then to all younger and older males. This stage unfolded in June and July 1941. The third stage began in August, bringing mass killings of Serbs, ranging from children to the elderly. The first Serbs to be arrested in the territory of Otočac were reserve officers, who were taken into custody by the Peasant Protection during the April War and were in prison when the Italians and Ustaše arrived. In the territory of Otočac, the first organized arrests of Serbs took place in May 1941 and included Serbs in Švica, Staro Selo, and Podum. The arrested Serbs were held captive at the local police station, and several were killed there. According to the testimony of Josip Barković, a teacher from Otočac, it seems that the arrest took place in late April 1941 and that around thirty Serbs from Otočac and its area were arrested, killed in Otočac itself, and thrown into pits near Janča. Some bodies were buried at Špilnik, not far from Otočac, and other victims were buried next to the Soko Movement House in Otočac. Barković notes that in the first three or four months, the Ustaše had *carte blanche* to do whatever they liked and arrested and killed Serbian inhabitants without trying to hide their misdeeds from the Italians.[21] In late May 1941, a merchant from Otočac called Vlado Karleuša was arrested, after which no trace of him could be found. His wife and two children were sent to Serbia. In June 1941, Mića Brakus, school inspector, Pero Branković, merchant, Bude Ružić, bank clerk, Stevo Žegarac, tax official, Sekiz, pensioner, and Nikola Vranješ and his

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[19] G. Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945* (Belgrade: Muzej žrtava genocida, 2004), 42–43.

[20] *Hrvatski narod* (4 June 1941).

[21] Hrvatski Državni Arhiv (henceforth HDA), Zemaljska komisija za utvrđivanje zločina okupatora i njihovih pomagača Hrvatske (henceforth ZKRZ-Zh), box 163, 2741/1945.

brother, merchants, all of them from Otočac, were arrested. At the same time, some other Serbs from nearby settlements were taken into custody and brought to the Jadovno concentration camp in Velebit and executed there. According to the account of Mile Brakus from Vrhovine, on 18 April 1941, the Ustaše from Gospić arrested 23 people in Vrhovine, killing seven and letting the remaining 16 go.[22] Sofija Levnajić also talked of this arrest, recounting the arrest and partial execution of all prominent Serbs in Vrhovine, perpetrated, among others, by local Croats from Čorkovo Selo.[23] The fourth round of arrests followed on 26 July 1941. The detainees included Angelina Grozdanić and her husband Stevan Grozdanić, Dr. Staniša Ilić, a lawyer, Rade Varda, an innkeeper from Otočac, Jovo Popović, a merchant, and several peasants from Švica. In this round, around twenty people were taken into custody. The Ustaše took all the detainees to the camp at Gospić. Staniša Ilić and Stevan Grozdanić were moved from Gospić to Jadovno. Angelina Grozdanić recalled that the Serbs who were to make the trip from Gospić to Jadovno were tied with wires two by two. She survived because she was sent from Gospić to Jastrebarsko, Kruščic, and Lobor-grad and from there to Serbia.[24] Nikola Grozdanić testified before the Committee for Ascertaining the Crimes of the Occupiers and Their Abettors that twelve peasants from Ponor were apprehended on 2 August 1941 and killed in the Otočac prison.[25] On 11 August 1942, Žarko Cvjetičanin of Brlog told the Commissariat for Refugees and Settlers in Belgrade that 37 Serbs had been taken from his village of Brlog already in May 1941. Some of the people arrested on that occasion were killed in Otočac and the pits at Gacko Polje, e.g., the Žuti Bezdan pit near Ličko Lešće. Those who were not killed in Otočac died in the Jadovno camp in Velebit. Žarko received a pass for Stara Pazova from the Italian authorities on 3 August 1942 and reached Belgrade on 10 August 1942.[26] Marta Ljubobratović, another resident of Brlog, also gave a statement on the Brlog arrests to the Committee for Ascertaining the Crimes of the Occupiers and Their Abettors. She said that there were three rounds of arrests, with nine people arrested in the first, eight in the second, and six in the third.[27]

Some Serbs in the villages of Švica, Ponori, and Gorići were arrested in much the same way as those in Brlog. That spring, two members of the Kangrga

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22 HDA, ZKRZ-Zh, box 620, 48106/1945.

23 Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 66–68.

24 Đ. Zatezalo, *Jadovno – zbornik dokumenata*, vol. II (Belgrade: Muzej žrtava genocida, 2007), 211–212.

25 HDA, ZKRZ-Zh, box 202, 6629/1945.

26 Zatezalo, *Jadovno – zbornik dokumenata*, vol. II, 213–215.

27 HDA, ZKRZ-Zh, box 613, 47507/1945.

family, father and son, farmers, were taken from Staro Selo near Otočac, along with some other peasants who can be traced no further than the Jadovno camp near Velebit. Three peasants were taken from Vrzići near Brlog and executed, and some Serbs in Žuta Lokva suffered a similar fate – they were arrested by the Ustaše in September 1941 and killed in a nearby forest. After that atrocity, the Serbs from Prokike retreated to the woods to avoid the same fate. In Prokike, as Evica Smiljanić recalled, twenty or so people lost their lives. Among the first to be arrested were the priest Đuro Marjan and Lazo Knežević, a native of Prokike who was working as a pâtissier in Senj. The first killings in the Brinje area happened on 25/26 May 1941 when the Brinje priest Vujadin Skendžić-Vuja, Luka Tomić, a farmer from Tuževići, Rade Rajačić, an official of the district court in Brinje, and Dmitar Maravić, a farmer from Brinje, were killed in the Škamrica forest.[28] In June 1941, the Ustaše began raiding the Serbian villages of Gornji kraj, Lučani, Prokike, and Županjdol, but failed to catch the local peasants. Concurrently, Orthodox priests were being forcibly deported and robbed. Đuro Orlić, a parish priest from Otočac, packed all of his property into wagons. However, when he reached Zagreb, the wagons were plundered, and Orlić lost all of his possessions.[29] A smaller number of Serbs from the Otočac area then fled, with or without passes, to Serbia.[30] Others fled to Dalmatia, a region fully under Italian control.[31] Mass deportations took place in the area of the Plitvice Lakes, whose Serbian population was deported on 29 June 1941. After a brief stay in Bihać, they were resettled in the district of Bosansko Grahovo.[32]

It was not until the first victims died and the first peasants were hurled into the pits around Lešće and Janča that the Serbs of the Brinje and Otočac districts realized the criminal nature of the NDH, which led to the appearance of the first Partisans in the territory of these districts.[33] The de-escalation of the Ustaše's terror campaign began when the Italian army took military and civilian control in the so-called Zone II. The sphere of Italian interest in the NDH was divided into the so-called Zones I, II, and III. The section of Dalmatia that had become part of the Italian sphere of interest was called Zone I. Zone II included Gorski Kotar, Lika, a considerable part of Herzegovina, and the entire Adriatic coastline with all islands. After August 1941, the NDH regime could

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28 Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 69.

29 Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 126.

30 Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 132.

31 Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*,134–135.

32 Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 138–139.

33 M. Bukvić, *Otočac i Brinje u NOB 1941–1945* (Otočac: Savez udruženja boraca NOR-a općine Otočac, 1971), 54–55.

no longer keep its navy, build fortifications or other structures, and deploy its law-enforcement forces in this zone. Starting from 1 September 1941, as per the agreement with the NDH government, the Italian army took total military and civilian power in Zone II, with the NDH troops in this zone operationally subordinated to the command center of the Italian 2nd Army in Karlovac. Thus, from 1 September 1941, the Ustaše and Home Guard (Domobran) troops fell under the control of the Italian army. Of course, the Italian forces terrorized Serbian villages in Lika due to the emergence of Partisan units. The Partisans clashed with Italian troops at Crna Vlasta on 27 September 1941, leading to the arrest of 14 persons from Crna Vlasta, Vrhovine, and Babin Potok. The conflict spread to Zalužnica, where four Serbian households were set on fire on 29 September 1941.[34] After that, the Italians raided Serbian-populated villages on several occasions, committing one-off crimes, burning and plundering the locals' property, etc.[35] In two noteworthy cases, the local population tried to protect the local Serbs. A camp for Serbs was to be established in Stajnica, and the district governor, Jurica Frković, wanted to resettle the Croatian population of Ličko Lešće in the depopulated Serbian villages in the Plitvice Lakes area.[36]

As early as 1941, the Italians convinced some of the Serbs from the Otočac area to join the Četniks, who cooperated with the Ustaše and the Germans. The Otočac area was precisely where the Četnik strongholds were located, with centers in Vrhovine, Škare, Zalužnica, Donji and Gornji Babin Potok, Prokike, and Brlog, and a base in Lipovo Polje.[37] In May 1942, the Italians raided Brlog and killed 29 Serbian men without a hearing. They accused them of having robbed a wagon loaded with wine that had belonged to the merchant Blažo Biondić. In September 1942, the Italians burned and ransacked Drežnica, Brezno, and Jasenak in the Ogulin area, and Vodoteč, Tužević, Škalić, Gostovo Polje, and Vojvoduša in Brinje.[38] In 1943, typhoid fever claimed many lives – as many as 200 in the districts of Otočac and Brinje. The Ustaše committed horrifying atrocities in the spring of 1944 when the bulk of the Partisan forces was quite far from the Gacka Valley. Namely, at that time, the German 392nd Infantry Division was stationed in the Gacka Valley. In 1944, more civilians from the Gacka Valley were killed than at any other time – according to Vezmar's research, as

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34 *Hronologija narodnooslobodilačkog rata 1941–1945* (Belgrade: Vojno-istorijski institut, 1964),, 106. Vezmar, Ustaško-okupatorski zločini u Lici, 244.

35 HDA, ZKRZ-Zh, box 267, 14128/1945. On the People's Liberation War (NOB) in the area of Otočac and Brinje see M. Bukvić, *Otočac i Brinje u NOB 1941–1945*.

36 Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 186.

37 Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 267.

38 Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 269, 293–294.

many as 624.[39] In Lučani near Brinje, eight people were murdered on 26 February, and in the hamlet of Divjaci in Škare, the Brinje Ustaše from Mesić's regiment killed 17 women, children, and elderly people. The entire settlement of Škare would have perished had the German troops not happened to arrive and rescue the locals.[40] In early April 1944, at Donji Babin Potok, the Ustaše killed 128 people, mostly in the hamlets of Bige and Gulani, wounding 30 in flight.[41] That spring, the whole village of Turjanski with the remaining inhabitants was burned. In April, the Ustaše raided the village of Crna Vlast (Vrhovine), killing eleven.[42] Vezmar claims that in 1944, as many as 150 were killed in Turjanski and Crna Vlast.[43] The most horrifying atrocity against the population of Brakusova Draga happened on 19 June 1944 when the Ustaše killed everyone they found in the hamlet, predominantly women, children, and the elderly. On that occasion, they killed 57 Serbs in the home of Branko Brakus Đidara after having encircled it and positioned machine guns in front of it. Having killed the imprisoned Serbs, they set fire to the house with the victims. A few people managed to flee the house and later testified about the killings of the local Serbs.[44] Then, at Vodoteč, a village in the northern part of the Otočac area, 128 people were killed on 12 November 1944. The massacre was perpetrated by the Ustaše of Križpolj, who attacked the village after the 13th Primorsko-Goranska Assault Division had left and gone deeper into Lika. The hamlets of Orlići, Bukvići, and Kosovci suffered the heaviest casualties, with 74 houses burned.[45] The slaughter continued in December, when the towns of Tužević, Lučani, and Vodoteč bore the brunt of the attacks. After these massacres of the civilian population, the surviving Serbs of Vodoteč and its area were evacuated to Kordun, Gorski Kotar, and Žumberak. The killings continued into 1945, for instance, in Vojvoduša and Tužević[46] and later in Prokike, Škare, and Zalužnica,[47] to a somewhat lesser

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39 Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 373.

40 On these atrocities see Bukvić, *Otočac i Brinje u NOB*, 382–387.

41 Vezmar, *Ustaško-okupatorski zločini u Lici*, 375.

42 HDA, ZKRZ-Zh, box 620, 48127/1945.

43 Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 376.

44 Đ. Zatezalo, *Radio sam svoj seljački i kovački posao, svjedočanstva genocida* (Zagreb: Prosvjeta, 2005), 271–284.

45 HDA, ZKRZ-Zh, box 235, 10230-10242/1945.

46 HDA, ZKRZ-Zh, box 238, 10578/1945. For instance, the Germans and Ustaše attacked Tužević on 19 January 1945 and killed 15 inhabitants, took 14 to a camp, and burned and plundered the property of 55. On the same day, they raided the Ivakuša village, destroying 33 buildings and killing eight people. Nine were taken to camps. (HDA, ZKRZ-Zh, kutija 246, 11731–11741).

47 Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 403–405.

extent, until the liberation of this region. The atrocities against the local Serbian population were largely committed by the Ustaše, followed by the Germans, Italians, and Četniks.

The list of victims provided by Dane Lastavica shows that the fascist terror campaign in the Otočac district claimed 691 lives during the four years of World War II – 211 in the first year, 47 in 1942, 51 in 1943, 377 in 1944, and five in 1945. 488 victims were men, and 203 were women. The largest group among them was men over twenty years of age (at least 345). The victims listed by name included 16 from Otočac, 89 from Brlog and Drenov Klanac, 20 from Dabar, 31 from Doljane, 59 from Donji Babin Potok, 4 from Dugi Dol, 17 from Gornji Babin Potok, 46 from Gornje Vrhovine, 9 from Glavci, 15 from Gorići, 4 from Oravac, 34 from Podum, 28 from Ponor, 32 from Rudopolje, 7 from Srpsko Polje, 6 from Staro Selo, 51 from Škare, 11 from Švica, 81 from Turjanski, 25 from Vrhovine, and 96 from Zalužnica. For the purposes of this research, the most pertinent are the victims of 1941 – those who played a part in the decision of some Serbs to convert to Roman Catholicism. Following the first arrests and executions of the most prominent Serbs in Otočac (14 in the first year of the war), the Serbian inhabitants of Otočac must have felt unsafe. Extensive arrest and execution campaigns were implemented in Brlog and Drenov Klanac, with 44 victims, most of whom were killed right there in Brlog. The execution of the detainees from Gorići took place at Janča, a village halfway between Otočac and Gospić. Twelve inhabitants of Podum were killed in Janča and Jadovno and 24 of Ponor in Janča. Six from Staro Selo and ten from Švica were killed in 1941 at Janča. Ten inhabitants of Turjanski were murdered at Jadovno in 1941, while ten from Zalužnica died at Janča. Besides the victims of fascist terror, some also fell in the People's Liberation War (Partisan casualties) – 621 in the Otočac district. In the Brinje districts, the fascist terror campaign killed 422 during World War II (230 men and 192 women). Twenty-seven men and six women died in 1941. The highest number of victims came from Prokike (31), followed by Gornji Kraj (15) and Brinje (7). The largest killing sites were Bukvići (36), Orlići-Vodoteč-Kneževići (88), Škalić-Malinsko (24), and Prokike (14). In addition to the victims of the fascist terror campaign, 317 Partisan victims fell in the Brinje district.[48] According to the list provided by Đuro Zatezalo in his book on the Jadovno concentration camp, 233 victims from the districts of Otočac and Brinje were killed at Jadovno and the complex of Ustaše camps

[48] D. Lastavica, *Hrvatski genocid nad srpskim i jevrejskim narodom u koncentracionom logoru Gospić (Lika) 1941–1945, a Srbima i 1991–…?* (Novi Sad: SP, 2011), 461–471. A list of the victims' names was provided in M. Bukvić, *Otočac i Brinje u NOB*, 411–532.

(208 from Otočac and 15 from Brinje).[49] Gojko Vezmar's research suggests that in the first year of the war, 320 civilians and 219 combatants were killed in the Otočac district, whereas 81 civilians and 14 Partisans fell in Brinje.[50] In the second year of the war, according to Vezmar's research, 122 died in the Otočac district and 58 in the district of Brinje.[51] The same source suggests that the total number of victims in both districts amounted to 2,272 (1,535 in Otočac and 737 in Brinje).[52] There were 1,232 combatant casualties (823 in Otočac and 409 in Brinje). Adding up these figures, the total death toll in both districts, according to Vezmar, was 3,404.[53] The number of victims, particularly in 1941 and 1942, shows that the Serbs had little interest in converting from Orthodoxy to Roman Catholicism when such a move did not guarantee their survival.

Religious Conversion in the Diocese of Senj-Modruš and the Territory of Otočac and Brinje

As soon as the NDH was proclaimed, Archbishop Stepinac paid a visit to Slavko Kvaternik and soon, on 16 April, had an audience with Dr. Ante Pavelić.[54] At these meetings and later, in an epistle sent to the clergy of the NDH on 28 April 1941, the archbishop expressed great satisfaction with the formation of the NDH and called on the clergy to undertake the "exalted work toward the preservation and progress of the Croatian state" (the bishops of Split-Dalmatia, Krk, and Senj did the same).

The Ustaše saw the Serbian Orthodox Church as the bearer and cornerstone of Serbian identity in Croatia and Bosnia and Herzegovina, and hence Orthodox priests were their first targets. The plan was to get the Orthodox believers to convert to Roman Catholicism, ultimately resulting in their assimilation, i.e., Croatization. A law on religious conversion was passed as early as 3 May 1941. With this act, the Ustaše regime positioned itself above the Roman Catholic Church, ruling that would-be converts had to address "their first requests to the executive authorities" (the district, i.e., the township governorate).[55] The Roman

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[49] Đ. Zatezalo, *Jadovno kompleks ustaških logora 1941*, vol. I (Belgrade: Muzej žrtava genocida, 2007), 731–732.

[50] Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 196–197.

[51] Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 290–294.

[52] Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 417.

[53] Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 421.

[54] J. Krišto, *Sukob simbola: politika, vjere i ideologija u Nezavisnoj državi Hrvatskoj* (Zagreb: Globus, 2001), 37–39.

[55] *Narodne novine* (4 May 1941).

Catholic Church was displeased with this interference of the state in religious affairs. The historian Jure Krišto compellingly shows how the correspondence and circulars between the Church and organs of governance were exchanged and how the state and the Church responded.[56] According to Archbishop St-

[56] The Archbishop's cathedra reacted to the law of 3 May on 8 May 1941, saying that "accession to the Catholic Church can only be allowed to persons confirmed to want to do so genuinely and convinced of the truthfulness of our faith and the need for the salvation of the soul" and advising that those "who want to join the Church out of the wrong motives, seeking in it nothing but protection of their material interests and egotistical objectives" should be rejected. Soon after that, on 27 May, the Ministry of Justice and Religion of the NDH published the Guidelines for Religious Conversion. In this document, Minister Mile Budak instructed the district and township authorities that only they were authorized to issue papers approving requests for religious conversion. In June, rules on receiving new members into the Roman Catholic Church came out. On 14 July, the Ministry of Justice and Religion of the NDH sent the diocesan ordinaries of the NDH a letter that showed that the Ustaše did not want Orthodox priests, teachers, merchants, craftsmen, and wealthy peasants to convert to Catholicism. It is also evident that the state did not want the Orthodox population to convert to Greek (Eastern) Catholicism and that issuing permits for religious conversion was the prerogative of the state. On 16 July, the Church sent a communiqué to the Ministry of Justice and Religion expressing its disagreement with prohibiting conversion into Greek Catholicism and the view that conversions should be allowed to the Orthodox intelligentsia. On 30 July 1941, the State Agency for Renewal (which had, in the meantime, gradually taken over matters pertaining to religious conversion) sent a circular reiterating its request for the authorities not to allow conversions to Greek Catholicism except in cases where there were already Greek Catholic parishes in place. The circular also mentions certificates of honesty that only district and municipal governorates could issue and which were a necessary prerequisite for beginning the process of religious conversion. These guidelines were valid in the entire territory of the NDH except for the region of Krbava and Psat and the county of Gora. A communiqué sent by the Church leadership to its hierarchy in early August 1941 plainly shows that the Church consented that the state authorities would issue honesty certificates, essentially letting the regime decide who would be issued a permit to convert and who would not. Would-be converts had to undergo "preparations" for converting to Catholicism, and these "preparations," i.e., religious instruction, were led by local priests or so-called missionaries who assisted the clergy. The pace and intensity of conversion were set by the Ustaše regime rather than the church hierarchy. Because of the chaotic situation and the changing circumstances (the uprising of the people and the German and Italian critical attitude toward the Ustaše's conversion policy), in September 1941, the Ministry of Interior Affairs sent a circular to the organs of the state and church ordinaries, hastening religious conversions and asking them not to make bureaucratic problems for those who wanted to convert to Catholicism. The Department of Religion of the State Agency for Renewal was formed in early October 1941 and took charge of all matters concerning religious conversion. Nevertheless, the Church expressed its official position on religious conversion and the state's interference

epinac's report to Pope Pius XII in 1943, 240,000 Serbs were Catholicized from May 1941 to the spring of 1942 in the territory of the NDH.[57] The campaign of mass Catholicization ended in the spring of 1942 with the establishment of the Croatian Orthodox Church.[58]

To make it easier to get the Serbs to convert, the Ustaše killed or forcibly deported a part of the Orthodox clergy. For instance, in Lika, they killed Dimitrije Jerković, a priest in Široka Kula, already on 13 April 1941. Priests Nikola Bogunović of Donji Lapac and Petar Majstorović of Doljani were killed in May. In the early days of the terror campaign, the priests in Plaško were murdered alongside their superior, Savo Trlajić. All of them were killed at the Jadovno camp in Velebit.[59]

The religious conversions in Otočac were individual rather than collective. Unlike northern Croatia (the Archdiocese of Zagreb and the Diocese of Đakovo and Srijem), which saw an exceptionally high rate of religious conversions, in the Diocese of Senj-Modruš, conversions were much fewer. There are three reasons for that. Namely, in this territory, the Ustaše had committed a string of atrocities against the local Serbian population shortly after the establishment of their regime, leading to an uprising of the people in Lika, Bosanska Krajina, and Kordun. In addition, in these zones, Serbs were later protected from Ustaše attacks because the Italians had taken control of the territory

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in this matter at the bishops' conference of 17–19 November 1941, issuing a ten-point conclusion. Firstly, it noted that only the Church could and must deal with conversions to Catholicism; secondly, it emphasized that only the church hierarchy could appoint those who would instruct would-be converts; thirdly, these instructors must be tied to church institutions; fourth, the Catholic Church recognized only the conversions that were conducted in line with church rules; fifth, state institutions were not allowed to rescind the conversions done by the Church; sixth, the bishops' conference would appoint a committee to ensure the implementation of rules during conversions; seventh, the Church would admit only those who sought to join it of their free will; eighth, the conversion ritual could not be determined by the state; ninth, the committee would organize courses for those who would later teach would-be converts; and tenth, all civil rights must be guaranteed to the converts. In this way, the Roman Catholic Church put a safeguard in place, ensuring that it could not be accused of Catholic proselytism, encouraging the members of other religions to convert, etc. For more details see Krišto, *Sukob simbola: politika, vjere i ideologija u Nezavisnoj državi Hrvatskoj*, 177–202.

57 J. Tomasevich, *Rat i revolucija u Jugoslaviji: okupacija i kolaboracija* (Zagreb: EPH, Novi Liber, 2010), 629–631.

58 See M. Radanović ed., *Pokatoličavanje Srba u Nezavisnoj državi Hrvatskoj* (Zagreb: SNV, 2019).

59 Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 148.

south of the demarcation line that went through Kordun. Jure Krišto[60] based his conclusions about the number of Serbs who converted in the Diocese of Senj-Modruš on the reports of local parsons. Seventy out of 139 parsons replied to the communiqué sent by Bishop Burić to all parishes, and Jure Krišto published this list. The communiqué shows that most conversions took place in 1941 and that the majority were performed in the following towns and parishes: Cvitović kod Slunja, Donji Kosinj, Drežnik Grad, Gračac, Jasenak, and Komesarac. Three of these saw the highest number of conversions: Jasenak, Cvitović, and Komesarac. Fifty-four converted to Catholicism (33 women and 21 men) in Jasenak, 106 in Cvitović (46 women and 60 men), and 264 in Komesarac (101 adults and 163 children). The conversions in Komesarac probably involved the believers on the Bosnian side of the Korana River – those from the village of Crnaje and the nearby Orthodox villages in the Cazin Municipality, not far from Komesarac. Besides these parishes, the highest number of conversions took place in the Gospić parish (204), followed by Vrbovsko (65) and the parish of Ogulin (61). Sušak and Crikvenica each saw 17 conversions from Orthodoxy. The local parson explained that in Sušak and Crikvenica, almost all of them were returnees to Roman Catholicism. The total number of converts in the Diocese of Senj-Modruš, according to the data obtained by Krišto, was 942. According to the reports sent by local parsons, 454 converted from Orthodoxy to Roman Catholicism. 472 persons and 22 families submitted requests to convert from Orthodoxy to Roman Catholicism. Thus, Krišto's research suggests that the number of Orthodox converts to Roman Catholicism in the Diocese of Senj-Modruš reached 926, in addition to 22 family requests (from the territory of Gračac and Drežnik Grad). However, there must have been more converts, as Krišto did not list all instances of conversion. According to Vezmar's data, preparations for Catholicizing Serbs took place in Ličko Petrovo Selo, but the conversions never took place because the inhabitants of this area were targeted in pogroms that led to the uprising. Conversion also proved unsuccessful in the Lovinac area, where parson Andrija Depeder refused to convert the Serbs of Ploča and Kike and sent them home, saying: "You've already been baptized; this is not about baptism but something else".[61]

In the territory of Otočac, 70 religious conversions not listed in Krišto's work took place in the first year of the NDH regime. These converts were prominent members of the local community or public servants. The listing for each family included a note on their financial status. The majority of conversions happened from May to July 1941, and those who requested them believed that

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60 J. Krišto, "Prijelazi na katolicizam u Senjsko-modruškoj biskupiji 1941–1943," *Riječki teološki časopis* 12, 1 (2004), 269–296.

61 Vezmar, *Ustaško-okupatorski zločini u Lici 1941–1945*, 145–152.

this would help them retain their jobs or businesses and, ultimately, save them from the Ustaše pogroms. The table below shows that only 22 families sought to convert to Catholicism in that period. This does not mean that no religious conversions took place in the Otočac area after July, but their number is likely to have been negligible because the Italians took complete control of this zone.

Table II. Number of requests for religious conversion in the Diocese of Senj-Modruš (Krišto 2004)

Parish	Number of submitted requests for conversion from Orthodoxy to Catholicism
Boričevac	1
Bribir	2
Crikvenica	1
Cvitović	106
Donji Kosinj	20
Drežnik Grad	15 families and 1 person
Generalski Stol	1
Gospić	1
Gračac	7 families and 1 person
Jasenak	54
Komesarac	264
Kraljevica	1
Ogulin	2
Ravna Gora	1
Ričice	1
Saborsko	4
Selce	3
Sveti Juraj	1
Široka Kula	2
Unknown	5
Total	472 and 22 families

Table III. Data from parsons' reports on the number of conversions from Orthodoxy to Roman Catholicism (Krišto 2004)

Parish	Number of conversions from Orthodoxy to Roman Catholicism
Crikvenica	17
Crni Lug	1
Fužine	2
Gospić	204
Grižane	6
Jablanac	3
Josipdol	4
Karlobag	1
Kostrena – Sveta Lucija	1
Kraljevica	1
Ledenice	3
Lič	1
Lički Novi	15
Lokve	1
Lukovdol	9
Modruš	1
Novi Vinodolski	2
Ogulin	61
Oštarije	9
Selce	3
Slunj	22
Sušak	17
Škrljevo	5
Vrbovsko	65
Total	454

Table IV. Name list of converts from Orthodoxy to Roman Catholicism in Otočac and its area[62]

Surname and name	Year of birth	Occupation and social class	Village	District	Financial Status	Date of conversion request / date of conversion approval
Tardi Pavle	1881	Merchant	Otočac	Otočac	500,000 kn	17 June 1941/30 June 1941
Tardi Katica	1899	Housewife, homemaker	Otočac	Otočac		17 June 1941/30 June 1941
Tardi Marija Vukosava	1922	Pupil	Otočac	Otočac		17 June 1941/30 June 1941
Tardi Jovanka	1929	Pupil	Otočac	Otočac		17 June 1941/30 June 1941
Aleksić Đuro	1879	Farmer	Orovac	Otočac	50,000 kn	5 July 1941/15 July 1941
Balinić Mile	1883	Senior woodland officer	Orovac	Otočac	60,000 kn	5 July 1941/15 July 1941
Balinić Milan	1910	Farmer	Orovac	Otočac		5 July 1941/15 July 1941
Balinić Mane	1915	Farmer	Orovac	Otočac		5 July 1941/15 July 1941
Balinić Đuro	1920	Farmer	Orovac	Otočac		5 July 1941/15 July 1941
Balinić Milka	1915	Housewife	Orovac	Otočac		5 July 1941/15 July 1941
Balinić Nikola	1904	Retired first lieutenant	Orovac	Otočac	50,000 kn	4. July 1941./16. July 1941.
Šašić Vujo	1901	Cobbler	Otočac	Otočac	250,000 kn	7 July 1941/11 July 1941
Šašić Gojko	1929	Pupil	Otočac	Otočac		7 July 1941./11. July 1941.

[62] HDA, Ministarstvo pravosuđa i bogoštovlja Nezavisne Države Hrvatske (henceforth MPB NDH), box 40, 4759-B-1942.

Šašić Božo	1932	Pupil	Otočac	Otočac		7. July 1941/11 July 1941
Šašić Mladen	1934	Pupil	Otočac	Otočac		7 July 1941/11 July 1941
Ilić Milić	1899	Retired master sergeant	Otočac	Otočac	20,000 kn	17 June 1941/30 June 1941
Miho-vilović Svetozar	1892	Private clerk	Otočac	Otočac	70,000 kn	17 June 1941/30 June 1941
Šuput Rade	1902	Retired master sergeant	Otočac	Otočac	60,000 kn	7 July 1941/12 July 1941
Šuput Ljubica	1931	Pupil	Otočac	Otočac		7 July 1941/12 July 1941
Šuput Bosiljka	1933	Pupil	Otočac	Otočac		7 July 1941/12 July 1941
Šuput Mile	1935	Child	Otočac	Otočac		7 July 1941/12 July 1941
Božić Dane	1898	Retired master sergeant	Otočac	Otočac	20,000 kn	7 July 1941/15 July 1941
Božić Danica	1902	Housewife	Otočac	Otočac		7 July 1941/12 July 1941
Božić Đorđe	1928	Pupil	Otočac	Otočac		7 July 1941/12 July 1941
Božić Nikola	1930	Pupil	Otočac	Otočac		7 July 1941/12 July 1941
Božić Bratislav	1938	Child	Otočac	Otočac		7 July 1941/12 July 1941
Ljubotina Nikola	1897	Retired master sergeant	Otočac	Otočac	35,000 kn	10 July 1941/16 July 1941
Ljubotina Ljubica	1924	Pupil	Otočac	Otočac		10 July 1941/16 July 1941
Ljubotina Đurđica	1925	Pupil	Otočac	Otočac		10 July 1941/16 July 1941.
Ljubotina Zora	1926	Pupil	Otočac	Otočac		10 July 1941/16 July 1941

Ljubotina Desa	1931	Pupil	Otočac	Otočac		10 July 1941/16 July 1941
Grozdanić Rade	1881	Farmer	Ponori	Otočac	50,000 kn	22 July 1941/30 July 1941
Grozdanić Ana	1890	Housewife	Ponori	Otočac		22 July 1941/30 July 1941
Grozdanić Mihael	1914	Farmer	Ponori	Otočac		22 July 1941/30 July 1941
Grozdanić Katarina	1921	Farmer	Ponori	Otočac		22 July 1941/30 July 1941
Grozdanić Marija	1922	Farmer	Ponori	Otočac		22 July 1941/30 July 1941
Grozdanić Daniel	1924	Farmer	Ponori	Otočac		22 July 1941/30 July 1941
Grozdanić Božidar	1928	Farmer	Ponori	Otočac		22 July 1941/30 July 1941
Grozdanić Nikola	1931	Farmer	Ponori	Otočac		22 July 1941/30 July 1941
Oršanić Boja	1915	Court clerk	Dubrava	Otočac	Receives a monthly salary as a court clerk	18 May 1941/2 June 1941
Ognjenović Đuro	1892	Retired repairman, previously in public service	Otočac	Otočac	20,000 kn	8 July 1941/15 July 1941
Ognjenović Marija	1898	Housewife	Otočac	Otočac		8 July 1941/15 July 1941
Ognjenović Juraj	1921	Blacksmith	Otočac	Otočac		8 July 1941/15 July 1941
Ognjenović Olga	1928	Pupil	Otočac	Otočac		8 July 1941/15 July 1941
Ognjenović Dušanka	1935	Pupil	Otočac	Otočac		8 July 1941/15 July 1941
Ognjenović Jovanka	1928	Pupil	Otočac	Otočac		8 July 1941/15 July 1941

Ćuić Dane	1888	Merchant	Otočac	Otočac	600,000 kn	14 July 1941/21 July 1941
Ćuić Stanka	1900	Housewife	Otočac	Otočac		14 July 1941/21 July 1941
Mirosavljević Julka	1870	Housewife	Otočac	Otočac	15,000 kn	14 July 1941/21 July 1941
Šašić Milan	1912	Shoemaker	Otočac	Otočac	50,000 kn	7 July 1941/15 July 1941
Šašić Jelena	1912	Housewife	Otočac	Otočac		7 July 1941/15 July 1941
Šašić Radmila	1932	Pupil	Otočac	Otočac		7 July 1941/15 July 1941
Šašić Marijana	1935	Pupil	Otočac	Otočac		7 July 1941/15 July 1941
Ilić Božo	1894	Barber	Otočac	Otočac	150,000 kn	15 June 1941/1 July 1941.
Ilić Katica	1928	Child	Otočac	Otočac		15 June 1941/1 July 1941
Ogrizović Rade	1890	Farmer	Otočac	Otočac	80,000 kn	8 July 1941/15 July 1941
Ogrizović Anka	1900	Housewife	Otočac	Otočac		8 July 1941/15 July 1941
Ogrizović Đuro	1923	Pupil	Otočac	Otočac		8 July 1941/15 July 1941
Ogrizović Julka	1925	Pupil	Otočac	Otočac		8 July 1941/15 July 1941
Eror Mile	1896	Merchant	Otočac	Otočac	100,000 kn	8 July 1941/16 July 1941
Ogrizović Ratko	1926	Pupil	Otočac	Otočac		8 July 1941/15 July 1941
Ogrizović Geco	1929	Pupil	Otočac	Otočac		8 July 1941/15 July 1941

Matulić née Grozdanić Dragica	1912	Teacher	Ponori	Otočac	Unknown because she is not a resident of the district	18 July 1941/31 August 1941
Žubrinić née Đurić Nada	1914	Independent business-woman	Otočac	Otočac	Unknown because she is not a resident of the district	23 May /17 June 1941
Pejnović Kosta	1896	Cobbler	Vrhovine	Otočac	150,000 kn	Early July/7 August
Alinčić Vasilije	1906	Teacher	Turjanski	Otočac	30,000 kn	5 May 1941/25 July 1941
Alinčić Marija	1908	Housewife	Turjanski	Otočac		5 May 1941/25 July 1941
Alinčić Dragoljub	1933	Child	Turjanski	Otočac		5 May 1941/25 July 1941
Alinčić Dubravka	1935	Child	Turjanski	Otočac		5 May 1941/25 July 1941
Alinčić Milojko	1938	Child	Turjanski	Otočac		5 May 1941/25 July 1941

Religious Identity of the Serbs in the Otočac Area after World War II

After the formation of federal Yugoslavia, the campaign of converting the Orthodox population to Roman or Greek Catholicism received a universal epilogue: all religious conversions were rendered null and void. A surviving ledger of conversions in the parish of Kunić Ribnički, near Ozalj, reports: "The Presidency of the State Anti-Fascist Council for the National Liberation of Croatia (ZAVNOH) issued on 16 August 1944 the following directive: starting from 1 October 1941, Orthodox conversions the occupying regime took place under duress and are therefore null and void. The keepers of vital records are obliged to remove all of those conversions. This should be done quickly and with no formalities".[63] With the development of Yugoslavism, the Serbs of Lika lost their fundamental pillar of identity – the Orthodox faith. Assimilation through allegiance to socialism gained momentum, and the distrust of the Church had

[63] This was written in the Marriage Record Book of the Kunić Ribnički parish, now in the Croatian State Archives, by the parson of Kunić on 26 July 1945 (HDA, Matična knjiga vjenčanih Kunić Ribnički).

its roots in World War II, when the priests of this region had been deported from their parishes, murdered at killing sites, or fled. Whatever the reason for their absence might have been, most of them did not spend the war years with their flock. The failure to restore churches in some settlements and the razing of churches by the local communist leaders suggested that the Serbs of this area had neglected the foundational pillar of their national identity. Other contributing factors included the insufficient number of priests at the disposal of the Orthodox Church to send them to all parishes and the failure to restore churches in many villages and towns either because the locals did not attend church services or because there was not enough funding to repair all places of worship.

During World War II, some Orthodox churches in the Brinje and Otočac area were heavily damaged, and many of those that had suffered lighter or heavier damage were completely removed after the war. The village of Lučane near Brinje, the birthplace of Patriarch Josif Rajačić, had a church which was heavily damaged during World War II; shortly after the war, the troops of the Yugoslav Army razed it to the ground.[64] Furthermore, according to the locals' accounts, several gruesome murders happened by the ruins of the church after the war. Dents in the ground can still be seen at the site of the demolished building. The Lučane parish also had the Church of the Descent of the Holy Spirit in Prokike, on the road to Senj. It was built in 1700 and shelled by the Italians during World War II.[65] After the war, the communist authorities razed the church and built a community center in the village. The locals report that ashlars with inscriptions can still be seen on the building of the community center.[66] There was another church in Vodoteč, not far from Lučane. The church in Vodoteč was destroyed during World War II and razed to the ground and replaced by a monument to the fallen combatants after the war.[67] The Church of St. Sava in Brlog was

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[64] M. Kosovac, *Srpska pravoslavna mitropolija karlovačka po podacima od 1905*. (Sremski Karlovci: Saborski odbor, 1910), 959–960. "Naslovna," Sveštena episkopija Gornjokarlovačka, accessed December 23rd 2024, www.eparhija-gornjokarlovacka.hr.

[65] Kosovac, *Srpska pravoslavna mitropolija karlovačka po podacima od 1905*, 960. M. Miljanović, "Devastacija pravoslavnih crkava u Hrvatskoj – gornjokarlovačka Eparhija," *Srpski glas* (December 1990), 10.

[66] Looking for the site of the church at Prokike, I passed it by several times, unaware that it was hidden in some roadside bushes. It was not until a local helped me that I managed to locate the last foundations of the old church near the Orthodox cemetery southeast of the main road leading from Brinje to Senj and Otočac.

[67] HDA, Komisija za odnose s vjerskim zajednicama NR Hrvatske (henceforth KOVZ), box 261, 213/1985.

damaged in World War II but escaped demolition after the war.[68] In Gornje Vrhovine, east of the route Otočac-Korenica, a lone tombstone reminds us that this was where the Church of St. Nicholas once stood.[69] Built in the early 18th century, this old church was burned down in World War II. As early as 1947, the local People's Liberation Committee built a community center in the churchyard, demolishing the church and repurposing the material in the construction of the center.[70] The Church of the Nativity of the Holy Virgin was built in the late 18th century in Doljani. It was burned in 1943 and completely disassembled by the local Serbs in 1946–1948.[71] In 1941, Professor Tkalčić came to the church in Glavace and took some of its icons to the Museum of Serbs in Croatia to save them from ruin. At Turjanski, the Church of the Dormition of the Holy Virgin was damaged in World War II by the Partisans,[72] whereas the Church of St. Nicholas in Škare suffered the same fate at the hands of the Ustaše in 1944 only to be mined after the war.[73] Local People's Liberation Committees planned to clear all remains of churches, as can be seen from the plan for removing the church at Donje Vrhovine. The church, whose ruins stood on a road leading from Otočac to the Plitvice Lakes, irked the local People's Liberation Committee, which claimed that it portrayed the village in an unflattering light and told a group of German tourists taking photos next to the church "whose work this was". Hence, they suggested that the building should be removed. At Brinje near Otočac, the church in the heart of the town had fallen into disrepair and remained so for a remarkably long time. The liturgy was performed in it just once a year, on the feast of the Transfiguration of the Lord. As Miloš Spasojević, the diocesan steward of Lika and parish priest of Otočac, wrote to the Bishop of Gornji Karlovci in the mid-1980s, no more than twenty believers attended the liturgy, and there were both Orthodox and Roman Catholics among them. In 1984, after the service, the priest told the attendees that the church could no longer host devotional services and would be closed for entry because it might cave in during the ceremony, advising them to go to the Catholic Church on the feast of the Transfiguration and pray there. After that, he asked for donations in timber from the timber companies at Vrhovine and Titova Korenica and sought assistance from the Executive Council of the Otočac municipality, but all three

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68 S. Orlović, *Pravoslavna eparhija Gornjokarlovačka, Šematizam* (Belgrade – Karlovac: Izdavačka ustanova Eparhije gornjokarlovačke Martiria, 2017), 173.

69 Kosovac, *Srpska pravoslavna mitropolija karlovačka po podacima od 1905*, 953–954.

70 HDA, KOVZ, box 271, 239/1987.

71 Orlović, *Pravoslavna eparhija Gornjokarlovačka, Šematizam*, 178.

72 Orlović, *Pravoslavna eparhija Gornjokarlovačka, Šematizam*, 183.

73 Orlović, *Pravoslavna eparhija Gornjokarlovačka, Šematizam*, 185.

stalled and tried to shift responsibility for this matter to each other. Finally, with four other Lika priests (from Suvaja, Velika Popina, Metko, and Gospić), he decided to take the matter into his own hands and procure the needed timber in the forest nearest to the Brinje church. Knowing that this might land him in prison and cost him his priesthood, he wrote a letter to the bishop of Gornji Karlovci and took full responsibility for this act.[74] The Partisans demolished the church in Dabar near Otočac in the fall of 1942. According to an eyewitness, Dmitar Zaklan, the commander of the battalion Božidar Adžija, ordered that explosives should be placed in the belfry of the church, although nobody had ever put up resistance from the church. After the Committee for Relations with Religious Communities was informed of who had demolished the church, Miloš Spasojević, the diocesan steward of Lika and parish priest of Otočac, suggested in July 1988 that the walls of the church should be repaired because the whole building might collapse when the bell tolls during funerals.[75] The church was never repaired. In some cases, émigrés from the USA, originally from Lika, financed the restoration of churches. In 1978, the former inhabitants of the village of Škare near Otočac funded the restoration of the Church of St. Nicholas.[76] Restorations funded in this way were relatively rare because the local population had little interest in investing their resources into religious buildings.

In an account given to the author of this paper in 2021, Nikola Ivančević of Zalužnica mentioned that there were no church weddings or baptisms during the socialist era. Priests rarely attended funerals. A priest came to cense with holy water, but not everyone received him in their homes. There were assemblies in Turjanski, Divosel, Zalužnica, Otočac, Doljani, and Škare, but accounts suggest that they were more of a secular than religious nature. Every village continued to have an assembly, but few continued to venerate saints and observe religious customs at the sites of erstwhile churches; instead, most inhabitants of Serbian nationality turned to the Communist Party as a pillar of their identity. A return to religion did not happen until 1991 with the awakening of nationalism in the war, which ultimately resulted in just 88 people living today in the Brinje municipality, 414 in the town of Otočac, and 311 in the Vrhovine municipality.[77]

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74 HDA, KOVZ, box 271, 284/1987.

75 HDA, KOVZ, box 274, 153/1/1988.

76 HDA,KOVZ, box 239, 151/1978.

77 Državni zavod za statistiku, accessed December 23rd 2024, www.dzs.hr.

Conclusion

Until World War II, the Serbs of the Otočac region were members of the Serbian Orthodox Church. During World War II, many Serbs from the Otočac and Brinje area were killed. The modest number of religious conversions suggests the futility of converting from Orthodoxy to Roman Catholicism. Namely, religious conversion could not save the lives of the Serbs of the Otočac region in the massacres and atrocities committed by the Ustaše, Germans, Italians, and Četniks. The low number of those who did request to convert, 70 in total, shows that the Serbs in Lika quickly understood the nature of the Ustaše regime, with many of them joining the Partisan movement as early as 1941. After World War II, due to the scarcity of priests, demolished churches, and the attitude of the socialist regime toward the Church, the Serbs in Lika mostly neglected religion and espoused the new communist pantheon. The situation remained unchanged until the war of 1991, when some Serbs in Lika returned to religion. However, after Operation Storm (Oluja) and the expulsion of Serbs from a part of the Otočac area, very few Serbs remained in the Gacka Valley, as evidenced by the most recent population census. Although some Serbs returned to the Otočac region, it was mostly an aging population rapidly waning away, sealing the future of this area, at least when it comes to its Serbian inhabitants.

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Migration and Different Relationships with the Place of Origin in Eastern Serbia: A Demographic Case Study

Abstract: The paper shows the demographic and cultural transformation of two micro-areas in eastern Serbia influenced by migration in the last few decades. The work is based on the results of qualitative field research in Homolje, Zvižd, and Ponišavlje in the period 2007–2024. The different historical and economic contexts of migration from these two micro-areas are shown through the causes and consequences of migration since the middle of the 20th century. Alongside demographic methods, the paper employs the qualitative interview and comparative method to depict multiple layers of the migration process. Through an interdisciplinary approach, we discuss the demographic causes of the ethno-anthropological phenomenon of identity transformation, and its reflection on the relationship with the place of origin. Qualitative and quantitative research confirmed the decisive influence of the socio-demographic characteristics of the migrating population and the migration destination, as well as the formation of specific identities among migrants, which resulted in a different relationship with the place of origin.

Keywords: Vlachs, Šopluk, Pirot, Kučevo, migration, ethnology, rural settlements, identity, demography.

1. Introduction

Migration, an act of spatial mobility, is an important factor in the erosion of traditional boundaries between languages, cultures, and ethnic groups, affecting identity construction. Migration is certainly not a recent phenomenon, but the scope of human mobility in the last few decades is unprecedented (Castles & Miller 2009). During the migration process, people's attachment to their place of origin is largely manifested through their remittances (Ghosh 2006; Skeldon 2008; Ivlevs, Nikolova & Graham 2019). In addition, relationships

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with the place of origin are reflected through contacts with the local community, use of native language, and practicing traditional customs (Portes & MacLeod 1996). Recent studies of migration processes have introduced the concept of transnationalism in explaining and understanding modern international migration flows (Quirke et al. 2009; Brettell 2003). However, most researchers assert that transnationalism weakens significantly in the second generation of migrants (Portes 2001), which is the case with international migrants from Serbia (Lerch et al. 2007).

This paper analyzes emigration from the place of origin, but also the migrants' relationships with their native settlement and ancestral home. Population migration can be seen as a process that results in the creation of migrants and their distinct identity, where identity is a relative category formed through the cognition of the "other" but serves to describe oneself (Žikić 2011). Antonijević et al. (2011) assert that switching between cultural patterns, one of which is for "domestic use" and the other for navigating the new environment, leads to the formation of a specific cultural identity of the guest worker. Different types of migrations from the researched area had different effects on the identity changes of those who moved away, which, again, was manifested differently in their relationships with their places of origin. Viewed in this way, migration represents a transitional path from the pre-migration to post-migration identity, during which the transformation of the place of origin (demographic, socioeconomic, architectural, etc.) also takes place. As for the temporal component of migrations, the decisive criterion for distinguishing temporary from permanent migration is the conscious desire and intention to return to the homeland among temporary migrants and not to return among permanent migrants. Yet, the duration of migration often erases this difference among European guest workers who, by definition, were temporary migrants, but whose stay in a foreign country extended for several decades, turning them into de facto permanent immigrants whose desire to return often transforms into a kind of myth and illusory hope that determined their relationship with their place of origin (Antonijević 2013).

The idea for this article arose from the striking demographic, ethnological, architectural, and morphological differences among the settlements of the Municipality of Kučevo and the City of Pirot[1] observed during field research on folk religion, traditional lifestyles in the countryside, and migration in eastern Serbia. In addition, the high share of Vlachs in the Municipality of Kučevo required an ethnological interpretation of migrations and their origin; it bears

[1] According to the Law on the Territorial Organization of the Republic of Serbia (Official Gazette RS 18/2016), the official names of the researched self-government units are "City of Pirot" and "Municipality of Kučevo" including urban and rural settlements. In all other references, the "City of Pirot" refers only to the urban settlement.

noting that there is still no consensus on the origin of the Vlachs in Serbian and Romanian ethnology, historiography, and demography, but the most likely hypothesis posits that they represent an ethnic amalgam with roots from the pre-Slavic period and centuries of coexistence and intermingling with the Serbian population, whose joint migrations went from one side of the Danube to the other, imposing strong Serbian and Bulgarian influences (Sorescu-Marinković 2006). Vlachs lived in the territory of Braničevo in the medieval period, as evidenced by toponyms recorded in 1467. However, some Serbian scholars have argued that today's Vlachs of eastern Serbia should not be ethnically identified with the medieval Vlachs, the descendants of the old Balkan ethnic group, and that the Vlachs of northeastern Serbia did not emerge as a community until the 18th and 19th centuries in contacts between Serbian and Romanian populations (Knežević 2013). A larger influx of Vlachs (Ungurians and Carans) from Banat and Transylvania into eastern Serbia during the 18th century, along with the preceding and parallel Kosovo-Metohija, Morava-Vardar, Šop, and Timok-Braničevo migration flows, gave the final ethno-demographic stamp to the present-day population of eastern Serbia (Cvijić 1966; Radovanović 1991; Knežević 2013). Also, in his travelogue "Through Our Romanians," Tihomir Đorđević (1906) mentions Romanians who call themselves Vlachs, noting that "in the Kingdom of Serbia, Romanians live in the area from Mount Rtanj to the Danube and from Velika Morava to Timok," i.e., that they inhabit four districts: Timok, Morava, Požarevac, and Krajina. He further states that the largest number of Romanians live near the Danube and Timok, while their numbers steadily decreased in the south and west of northeastern Serbia (Đorđević 1906). In his book "Vlachs at Sunset," Paun Es Durlić humorously presents four theories about the origin of the Vlachs, including the inverse theory, according to which the Vlachs are romanised Serbs; the autochthonist theory, which isn't accepted in academic circles but has its supporters; the Aurelian theory, which emerged in Romanian literature but is less known in the Serbian academic community, claiming that the Vlachs are the remnants of the Roman population, i.e., the Dacian population that Emperor Aurelian resettled from Dacia, and the Romanian theory, which sees the Vlachs as part of the Romanian ethnic corpus (Durlić 2020).

On the other hand, it is interesting that Cvijić (1922), describing the participants of the Morava-Vardar and Šop migration flows, says that they speak a similar dialect (*šopski*) and that the remarkable mobility of this population resulted in their breaking ties with their place of origin very quickly during frequent relocations, which is one of their most prominent ethno-psychological characteristics. The participants of these migrations were mostly cattle breeders and construction workers (bricklayers). The City of Pirot belongs to the historical-geographical area of Šopluk, which can shed more light on the character

of the later (and modern) migrations in this area. Šopluk, a wider area, and Torlak,[2] a part of Šopluk, have their ethno-linguistic specificities. Citing Serbian and Bulgarian authors, Dejan Krstić, in his doctoral dissertation (2014), states that since the 19th century, the word *Torlak (Torlačija)* has been used for the broader environs of Pirot. Krstić also refers to Simeon Hristov, who maps out the wider borders of Šopluk. "As is known, the whole of western Bulgaria is called, not quite completely, Šopluk, and on the Serbian side of the Balkan mountain range, part of that 'Šopluk' in the Pirot district is called Torlak, and its inhabitants are called Torlaci (exonym)" (Hristov 1894 after Krstić 2014, 28). "The border of Torlak is broader than the area of the City of Pirot itself and extends to the village of Gubeš (Bulgaria) on the southeast, in the northwest to Crvena Reka, and in the southwest to Lužnica (Babušnica)" (Krstić 2014, 28).

The differences in the physiognomy of settlements between the two researched areas and the construction periods of family houses and individual farms deepened during the period of recent intensive emigrations from the 1960s onward. Migrations were (and remain) a strong driver of large-scale demographic, economic, and ethnological changes in the observed area. This research aims to shed light on the differences between the migrations that flowed from the rural settlements of Kučevo and Pirot and caused a different relationship of the emigrants with their own place of origin and family home.

2. Theoretical Background

After World War II, mass labor migration to Western Europe began, which was followed by the formalization of migration through a series of bilateral agreements between the home countries and the former SFR Yugoslavia (with France in 1965, Austria and Sweden in 1966, and FR Germany in 1968), enabling migration flow for the decades to come. Migrations during the 1990s, in a way, represent a special phase prompted by the disintegration of the former SFRY and social crisis, marked by a particular massivity and the appearance of refugees, brain drain, and the emigration of guest workers' children who had lived in the homeland until then. Emigration continued even after 2000, given that socioeconomic changes did not take place at the expected pace; this period was characterized by (mostly permanent) emigration of more educated segments of

[2] The terms *Šop* and *Torlak* are basically pejoratives used to denote personal characteristics, and a group label for residents of passive mountainous areas and a particular ethnoculture, primarily their speech. In the old vernacular, the word *torlak* meant a young man behaving rudely, who spoke loudly, shouted, and was difficult to understand, or one who roisters, "galami/torla".

the population and seasonal and circular migration of low-skilled laborers, who took advantage of the visa liberalization regime after 2010.

Globally, intensive research on migration began in the 1960s. However, the academic field of population migration has yet to produce a coherent theory, instead proposing many fragmentary approaches. Yet, in terms of the breadth of the perspective from which we look at migration, we can say that we have a micro, meso, and macro approach. The micro approach says that an individual (as a member of a family) decides to migrate in search of a higher living standard. The meso approach stresses the existence of a complex of social ties through which migrants connect, often initiating the so-called "migration chain". Finally, macro approaches connect migration with broader structural socioeconomic and global processes in industrialized countries, such as the dual theory of the labor market, which emphasizes the stimulating conditions of the internal laws of the labor market in developed countries, which encourage population movements in search of work (Antonijević 2013).

Migration, from the perspective of the place of origin, always takes a potential return to represent a migrant's failure to adapt to the foreign environment, or, as a logical outcome of a planned family strategy, which had always included going back to their homeland. Moreover, it is a natural outcome of a satisfactory experience, whereby temporary migrants care most about showing their success precisely in the place of origin. According to this, "the returnee, since he tries to adapt to the expectations of the native community, and in his desire to be accepted again, tends to orient himself towards patterns of luxury/wasteful consumption and unproductive investment in the homeland" (Cassarino 2004, 260), which is often the case with our guest workers, especially in the northern part of eastern Serbia.

Anthropologists were mainly interested in what happens to migrants in the place of immigration and in what way they remain connected to the country of origin (Brettel 2003), who, how, and why emigrates, what it means to "be a migrant", and how they interpret and construct their own identity (Antonijević 2013). In anthropological studies of migration, the assimilation model is very important given the complex processes of acculturation and integration of migrants into a new environment and building a new identity. In contrast, the transnational model is based on the perceived importance of return movements and the circularity of migration processes, so it gives special importance to the study of migrants' intentions to return to their place of origin (Guranizo, Portes & Halles, 2003). Also, anthropology recognizes the "migration culture" that arises when migrations become the prevailing model of living within a community, increasing the probability of all future migrations (Antonijević 2013), as is the case in the Braničevo and Bor districts in Serbia (Predojević Despić & Penev 2016). Research on migration and migrants' identity has been carried out

in almost all post-socialist countries. International migrations in Europe mainly went from east to west, creating transnational identities and connections (Anghel 2013), and simultaneously changed the socio-cultural environment in the migrants' place of origin (OECD 2016). Through the myth of return (Tomić, Pichler & Scholl-Schneider 2018) and intergenerational transfers (Földes 2020), migration has influenced the actors themselves and their relationship with the place of origin (Elrick 2008).

3. Methodology

Field research was carried out in stages from 2007 to 2024, and according to the testimonies of the respondents, we can clearly separate the period of the 1960s and the initial departure abroad from the post-2000 period of socio-economic transition, logically covering the period from 1961 to 2022. Although some authors (Antonijević 2013; Marković 2005) identify six migration waves from Serbia since 1945, for the purposes of analyzing initial social contexts, this paper uses a tripartite division: pre-1990 migrations (the socialist period); migrations during the 1990s (the crisis period); and post-2000 migrations (the most recent period).

As for the spatial framework of the research, the selection of settlements was not random, but targeted. In the municipality of Kučevo, villages where migrations started in the 1960s (where it was possible to interview all three generations of migrants) were investigated. On the other hand, the collection of testimonies on migrations in the villages of Pirot was a coincidental continuation of research during the engagement at the Museum of Ponišavlje. Within Kučevo Municipality, all settlements except Kaona, Sena, Mišljenovac, and Mustapić were investigated – a total of 22. Slightly fewer settlements were investigated within the City of Pirot (Pakleštica, Temska, Gnjilane, Gostuša, Novi Zavoj, Rsovci, Slavinja, Visočka Ržana, Dobri Do, Dojkinci, Nišor, Oreovica, Sopot, Pasjač, Barje, and Čiflik, so 16 settlements). The period of field research was quite long because it was difficult to reach migrants who work abroad, i.e., to find them in the place of origin, so it required visiting the same settlement several times, and secondly, research on their migration experiences was conducted in parallel with the research on folk customs and traditions.

The municipality of Kučevo, located in eastern Serbia, has a significant share of the Vlach ethnic group,[3] which is important to consider when interpreting the drivers of migration. On the other hand, the City of Pirot in the his-

[3] According to the respondents' statements about their mother tongue during field research, the share of Vlachs in the municipality of Kučevo can currently be estimated at around 30%.

torical-geographical and ethnological sense belongs to Šopluk, which includes the areas south of Rtanj Mountain, east of the South Morava, all the way to northeastern Macedonia, and in Bulgaria to Sofia and Rila Mountain (Vlahović 1999). The majority of the population of the City of Pirot are ethnic Serbs, but, regardless of the population's poor (modern) spatial mobility (Radovanović & Gigović 2010), in terms of the ethnological interpretation of migration, the specificities of the dialect and ethnopsychic characteristics of the people of Šopluk (especially in the villages on Stara planina) must not be ignored (Cvijić 1922; Cvijić 1966).

The main data sources were census books and Demographic Statistics. Documentation tables of the Statistical Office of the Republic of Serbia (RZS) served as additional descriptive sources on various features of the population. It is important to emphasize that the data on the total population were not methodologically comparable in all censuses, which is very important for analyzing the migration balance using the vital statistics method, so the total population of these two municipalities will be observed according to the census methodology from 2002 onwards, i.e, the population working/staying abroad, will be excluded from the total population in the censuses prior to 2002. Yet, the qualitative interviews and testimonies of respondents collected from 2007 to 2024 will provide decisive evidence on the relationship with the place of origin, duration of migration, and reasons for emigration and return. In this article, we will try to present an ethnological interpretation of economically and demographically driven changes in Kučevo and Pirot, synchronously using methods specific to demography and ethnological methods (qualitative interviews and the comparative method), alongside general scientific methods. On the other hand, we aim to provide strong demographic evidence for different paths of transformation of these two regions and the migrant identity of their populations

4. Results

The two observed local self-government units (SGUs) show significant differences in terms of population size (Table 1). During the observed period 1961–2022, the population of Pirot decreased from approximately 68,000 inhabitants to less than 50,000 inhabitants. This drop in the number of inhabitants took place under the dominant influence of the negative migration balance. In the same period, the number of inhabitants of the Municipality of Kučevo decreased from slightly over 30 thousand to under 12 thousand inhabitants, also under the dominant effect of the negative migration balance. However, although the intensity of depopulation in the Municipality of Kučevo was higher in relative terms, the similarity in the structure of depopulation, as well as in its absolute amount, is very indicative.

Table 1. Population dynamics

Census	1961	1971	1981	1991	2002	2011	2022
Pirot	68073	68349	68461	67113	63791	57928	49601
Kučevo	30452	27812	24848	21752	18808	15516	11806
Population change index Pirot	/	100,4	100,2	98,0	95,1	90,8	85,6
Population change index Kučevo	/	91,3	89,3	87,5	86,5	82,5	76,1

Source: Statistical Office of the Republic of Serbia. 2023. *Comparative Overview of Population Numbers – Municipalities and Settlements. Census of Population, Households and Dwellings.*

The number of inhabitants of the City of Pirot (from 1961 to 2022) decreased by 18,472 inhabitants and by 18,646 in the Municipality of Kučevo, with a negative migration balance in Pirot of –12,654 and in Kučevo of –12,814 inhabitants (Table 2). Although the intensity of depopulation in the Municipality of Kučevo was higher in relative terms, in both self-government units (SGUs), approximately one-third of depopulation can be attributed to a natural decrease and two-thirds to the migration balance (68.5% and 68.7% respectively).

Table 2. Net migration balance and natural increase

Census	1961–1971	1971–1981	1981–1991	1991–2002	2002–2011	2011–2022
Migration balance Pirot	–3872	–2045	–1392	–433	–1845	–3067
Migration balance Kučevo	–3105	–3154	–2490	–2279	–1024	–762
Natural increase Pirot	4148	2157	44	–2889	–4018	–5260
Natural increase Kučevo	465	190	–606	–665	–2268	–2948

Source: Statistical Office of the Republic of Serbia. 2023. *Comparative Overview of Population Numbers – Municipalities and Settlements. Census of Population, Households and Dwellings; Demographic Statistics, corresponding years.*

Quantitative analysis of migration will be performed in three ways: internal migration, international migration, and net migration balance.

4.1. Quantitative Analysis

Internal migrations in the City of Pirot went towards resettlement to the municipal center, so in the period 1971–2022, the population that immigrated from other settlements of the City of Pirot ranged between 30.9% and 24.4%, while the share of persons who immigrated from other municipalities in Serbia was

between 14.1% and 11.1% of the total population. At the same time, in Kučevo, these shares were significantly lower, ranging from 17.8% to 13% and between 12.9% and 8.2%, respectively. Intra-municipal migration in the City of Pirot was 50% to 100% more intense than in the Municipality of Kučevo. Also, internal migrants in the City of Pirot, both at the beginning and at the end of the observed period, make up about 37% of the population (due to a constant decrease since 1991), while in the Municipality of Kučevo, their share, although small, is significantly increasing (Table 3).

Table 3. Total population and immigrant population – internal migrations

Census	1971	1981	1991	2002	2011	2022
Pirot – from another settlement	17953	20359	20718	17358	14452	12099
Share	25.9	29.2	30.9	27.2	24.9	24.4
Kučevo – from another settlement	3789	4154	3881	2860	2432	1925
Share	13.0	14.6	17.8	15.2	15.7	16.3
Pirot – from another SGU	7722	8055	8549	8266	8166	6517
Share	11.1	11.6	12.7	13.0	14.1	13.1
Kučevo – from another SGU	2438	2318	2260	1827	1944	1524
Share	8.4	8.2	10.4	9.7	12.5	12.9

Source: Statistical Office of the Republic of Serbia. 2023. *Comparative Overview of Population Numbers – Municipalities and Settlements. Census of Population, Households and Dwellings; and Migrations – Data by Municipalities and Cities, corresponding years*.

However, the annual balance of internal migration in both SGUs has been negative since 1996, with an average value of –1.6‰ in the City of Pirot, and –3.6‰ in Kučevo. Also, during the crisis of the 1990s, neither Kučevo nor Pirot was a location that saw a significant influx of refugees. Thus, only 922 refugees were registered in Kučevo in 1996, or 3.5% of the estimated population, while 1,957 refugees were registered in Pirot, or 2.9% (RZS 1997). The number of internally displaced persons was also low (370 in Pirot and 50 in Kučevo) (Rašević & Penev 2009).

As for international migration, in the 1961 Census, data on the number of people working/staying abroad wasn't collected because the phenomenon was extremely rare. A census of people temporarily working and residing abroad was carried out for the first time in 1971, when 228,115 persons (2.7% of the population) were recorded for Serbia. Going to work abroad was relatively uncommon in Pirot compared to some other municipalities in eastern and southeastern Serbia. According to the 1971 census, the number of persons from Pirot working/staying abroad was 936 or only 1.4%, while at the same time, in the Municipality of Kučevo, it amounted to 1283 inhabitants (4.4%). The number and share of

the population of the Municipality of Kučevo abroad continued to grow, unlike in Pirot. The population from Pirot working/staying abroad began to decline after the initial jump in the 1960s and 1970s. According to the 1981 census, there were 1163 such persons, 545 in 1991, 857 in 2002, and according to the 2011 census, 935 residents of Pirot were working/staying abroad, with shares of 1.7%, 0.8%, 1.3% and 1.6% respectively. On the other hand, the trend of emigrating abroad from the Municipality of Kučevo continued: in 1981, there were 3,581, in 1991 3,897, in 2002 6,068, and in 2011 as many as 6,824 residents working/staying abroad with a share of 12.6%, 13.2%, 24.4% and 30.7% respectively. According to the number and share of people working/staying abroad, Kučevo belongs to the group of highly emigrating municipalities together with Žabari, Malo Crniće, Petrovac na Mlavi, Veliko Gradište, Kladovo, and Negotin, with five to seven times higher shares of the population outside the country compared to the national average. At the same time, the City of Pirot records a value several times lower than the national average when it comes to external migration of the population (Stanković 2014). As for the 2022 Population Census, the number of people abroad in the City of Pirot remained almost the same (949), with a share of 1.9%. On the other hand, the shares of the population of Kučevo working and staying abroad are high and growing, far exceeding the corresponding shares in Pirot, reaching 34.6% of the total population, although its number decreased (Table 4) due to the significant share of returnees (excluding population from ex-Yugoslav countries) (11.5%).

Table 4. International migrations[4]

Census	1971	1981	1991	2002	2011	2022
Pirot – Immigrants from abroad	/	216	118	269	448	1078
Share*	/	0.3	0.2	0.4	0.8	2.2
Kučevo – Immigrants from abroad	/	11	104	172	224	1353
Share*	/	0.0	0.5	0.9	1.4	11.5
Pirot – Living and working abroad	936	1163	545	857	935	949
Share	1.4	1.7	0.8	1.3	1.6	1.9
Kučevo – Living and working abroad	1283	3530	3897	6068	6824	6248
Share	4.4	12.4	13.2	24.4	30.7	34.6

*Note. *Share of the usual population in country.*
Source: Statistical Office of the Republic of Serbia. *Migrations – Data by Municipalities and Cities, corresponding years*.

[4] The number of persons abroad in census data could be interpreted only as a sample based on information obtained from registered persons in the country, mostly family members.

The shares of internal migrants in the Municipality of Kučevo until the 2011 Census were relatively low (on average 15% lower than in Pirot). Yet, data from the 2022 census show that the share of internal migrants has increased to 29.2%, and that internal migration now dominates, accounting for 73.5% of the total migration balance. The international migration of the population of Kučevo can certainly be labeled as "old" emigration, and the slowdown of external migration can be largely explained by the exhaustion of the migration potential.

Differences in the migration balance between Pirot and Kučevo are evident, and during most of the observed 60-year period, the Municipality of Kučevo saw more intense emigration (Table 5).

Table 5. Net migration balance rate

	1961–1971	1971–1981	1981–1991	1991–2002	2002–2011	2011–2022
Pirot (‰)	−5,7	−3,0	−2,1	−0,6	−3,2	−5,2
Kučevo (‰)	−10,7	−12,0	−10,7	−10,2	−6,3	−5,1

Note. The 1961 Census data does not show the number of residents outside the country because at that time, the phenomenon was negligible. In this sense, the real value of the migration balance in the period 1961–1971 may be slightly lower than shown in the table.

Source: Author's calculation based on the data from the Statistical Office of the Republic of Serbia 2023. *Comparative Overview of Population Numbers – Municipalities and Settlements. Census of Population, Households and Dwellings; and data from Demographic Statistics, corresponding years.*

The average rate of the net migration balance in Pirot was −3.2‰, while in Kučevo it was −9.7‰. However, this does not mean that there was three times less migration in Pirot; rather, real similarities and differences can be seen precisely when comparing the migration balance of the rural areas of these two SGUs. However, calculating the migration balance by the vital statistics method, besides the available data on the natural increase at the settlement level, required an estimation of the natural increase for the period from the critical moment of the Census in 1961 to 12/31/1962. The estimated natural increase in the mentioned period for Pirot villages is 527, and for Kučevo villages, 81. So, the number of inhabitants from the rural area of Pirot decreased through migration by almost 23,000 inhabitants, and in Kučevo by slightly over 12,000. At the same time, the average annual rate of migration balance in the villages of Pirot was −12.7‰, while in the villages of Kučevo it was −11.4‰. The scope of emigration from Pirot villages was slightly higher, however, in the first decade of the observed period, the level of emigration had the features of an exodus when almost half of the observed migration decline occurred (48.9%). The villages of Kučevo

experienced a similar fate, but the high intensity of emigration lasted longer than four decades, ranging between −12‰ and −14‰, while in the villages of Pirot, the rate of migration balance dropped from the initial −25‰ during the 1960s to −1.6‰ until 2002 (Table 6).

Table 6. Net migration balance in rural area of Pirot and Kučevo in the period 1991–2022

Net migration balance	1961–1971	1971–1981	1981–1991	1991–2002	2002–2011	2011–2022
Pirot – Average population	44563	36110	29983	25164	21128	16901
Kučevo – Average population	24961	21834	18770	15800	12937	10033
Pirot – Natural increase	1054	−1298	−2566	−3669	−3091	−2442
Kučevo – Natural increase	295	−74	−689	−755	−2285	−2318
Pirot – Net migration balance	−11245	−5417	−2972	−432	−879	−2042
Kučevo – Net migration balance	−3365	−3110	−2255	−2241	−445	−761
Pirot – Annual NMB rate (‰)	−25.2	−15.0	−9.9	−1.6	−4.4	−11.0
Kučevo - Annual NMB rate (‰)	−13.5	−14.2	−12.0	−12.9	−3.6	−6.9

Source: Author's calculation based on the data from the Statistical Office of the Republic of Serbia 2023. *Comparative Overview of Population Numbers – Municipalities and Settlements. Census of Population, Households and Dwellings; and data from Demographic Statistics, corresponding years.*

The following graph shows the net migration balance in the period 1961–2022, separately for the rural area, and separately for the total population in both SGUs (Figure 1). Figure 1 clearly shows that the bulk of emigration from the villages of Pirot went towards the city center until the 1990s, when, due to the economic crisis and the depletion of the demographic potential, this wave weakened. During the crisis of the 1990s, the urban settlement itself began to record a negative migration balance, and in the second decade of the 21st century, migration was increasingly directed outside the territory of the City of Pirot.

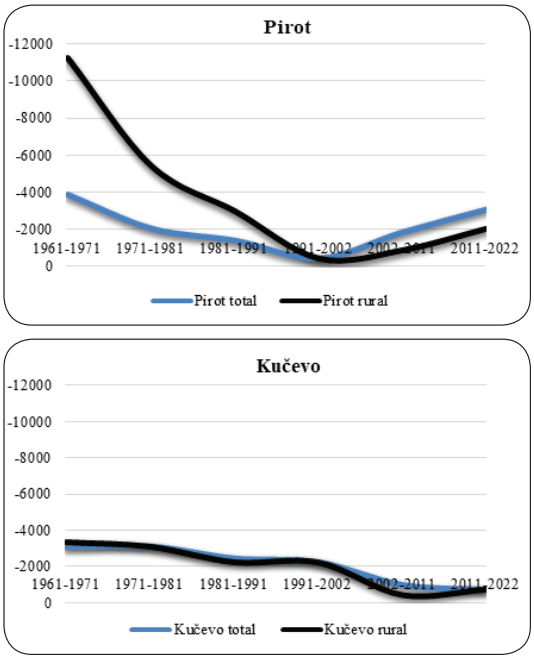

Figure 1. Net migration balance in rural and total areas of Pirot and Kučevo in 1961–2022.

On the other hand, migration from the Kučevo villages never went dominantly to the urban settlement but abroad, with the most significant feature that it was constant and undiminished, as attested by the growing numbers (and shares) of people outside the country.

4.2. Qualitative Analysis

Migrations in Pirot and Kučevo from the 1960s onward are the result of the specific socio-economic context in which these migrations were initiated. In this primarily agricultural area (parts of Šopluk and Homolje, including the southern and south-eastern parts of the SGU Kučevo on the northern side of the Homolje Mountains), extensive sheep and goat farming dominated until the middle of the 20th century, while land cultivation was much less prevalent due to the specifics of the relief and poor soil. The form of animal husbandry did not differ, but the main difference was an existent tradition of "pečalba" (seasonal wage labor far from the place of origin) in Ponišavlje and Pirot since the late 18th century, where men aged 18 to 50 migrated primarily to the neighboring Wallachia and Bulgaria in early March or later in spring and returned in November: "We used to go to *pečalba* around Mladenci, March 22, or around Đurđevdan, May 6. Seasonal workers returned from *pečalba* after Mitrovdan (November 8). Everyone went to *pečalba*, craftsmen, bricklayers, and apprentices" (Predrag

Ćirić, seasonal worker from Gostuša). This practice lasted until 1912/13, when pečalba spontaneously stopped, although it remained internally present until World War II (Nikolić 1974; Hristov 2015).

Migration was uncommon in Kučevo until the mid–1960s, when the population was mainly engaged in sheep field farming. According to the testimonies of the interviewees, during the 19th century, migration flowed from hamlets to villages. "People moved from villages during the time of Captain Miša Anastasijević primarily because of the purchase of lamb skins and cheese". LJ. D. (b. 1948). The dependence of the people of Kučevo on sheep and goat breeding is visible in the locals' stories and testimonies. According to M.J. (b. 1949), who lives in Voluja, the hamlet had a few dozen houses, people resettled during the 1960s. "Some went to Voluja to be closer to Majdanpek and Kučevo, and some went abroad from Voluja; we sold the sheep and only kept a few for our own needs".

The exclusive reliance on sheep and goat breeding represented a particular economic vulnerability of this part of the population. To understand the changes that led to the waning of field farming and growing industrialization, as the preconditions for migration, we must refer to the laws and bylaws introduced after World War II. One of the most important acts was the "Regulation on the prohibition of keeping goats in free grazing," introduced in 1948 (Knebl 1978), resulting in a drastic decrease of livestock in "bačije" (a form of cooperative field farming of sheep) and severe deterioration of the locals' socioeconomic status. Before World War II, there were almost 3 million goats in the territory of the SFRY, with domestic Balkan goats predominantly present in extensive farming. In 1948, there were 1,300,000 goats, and then the Law introduced the prohibition of keeping goats in free grazing to protect forested areas. However, a certain number of white goats remained, whose breeding the Law allowed under certain conditions NaDrugiPogled. 17.7.2022. Accessed: August 3, 2025. Extensive goat farming was more prevalent than sheep farming in poor areas as a cheap source of meat for the population. Also, land consolidation (*komasacija*) and the nationalization of agricultural land affected the socioeconomic status of peasants, primarily by reducing their plots of land, making sheep and goat field farming almost impossible. During the 1950s and 1960s, rapid industrialization followed, leaving the industry of Kučevo much less developed and with a much lower need for labor compared to the Majdanpek Mining Basin, which attracted a significant number of workers from the municipality of Kučevo. A modest need for industrial labor, agrarian overpopulation, low educational levels, poor knowledge of the Serbian language among the Vlachs, and a series of bilateral agreements on organized labor emigration of the SFRY with foreign countries directed the migration from Kučevo villages abroad. It is indicative that in most villages, the interviews were very similar and the stories are reminiscent of each other, typically stating that, due to poor education or "having not spent a single day at school," they went abroad because they could not get a job in the newly

founded local companies. According to numerous interlocutors during the field research conducted in Rudna Glava[5], because of the large number of sheep, many Vlachs born in the first half of the 20th century did not attend school at all, or went only to the third grade of primary school, and some went even less.

At the turn of the 1950s and 1960s, companies that later became famous throughout the SFRY were founded in eastern Serbia, such as Prvi Maj Pirot, ŠIK-Kučevo, Rudnik Bakra Majdanpek, Zlatara Majdanpek, and EI Niš. This period also saw the revival of the tire factory Tigar in Pirot. These companies initiated micro-migrations from the countryside to the city, as well as migrations from the SFRY abroad. In both municipalities under scrutiny, Kučevo and Pirot, the rural population migrated to cities and industrial centers (Pirot, Majdanpek, rarely to Kučevo) in search of a better life, abandoning traditional sheep farming. The elderly and low-skilled workers remained in the countryside, e.g., in the villages of Kučevo. Due to the large surplus of unqualified labor that Kučevo could not absorb, these people went abroad for "temporary work". The main peculiarity of these early waves of labor migration from the SFRY was their actors, young and healthy rural men who lived modestly in the country of immigration. Their wives joined them later, while the children mostly stayed home under their grandparents' care (Kovačević & Krstić 2011). These international economic migrants in the Kučevo region were usually called "guest workers" (*gastarbajteri*), while in the Pirot region, migrants were mostly internal industrial workers who were the bearers of the deagrarianization process. This type of in-demand worker and the situation in the native region were the most important drivers of the emigration from the Kučevo and Pirot villages during the first wave of migration in the 1960s.

During the interviews, it was confirmed that the poorest categories, who no one wanted to employ, predominantly went abroad. They thought that their departure would be temporary and that they would return, but few decided to make such a move in northeastern Serbia, in contrast to Ponišavlje and Pirot, where the majority returned, albeit not to their villages but to the city of Pirot. An important reason for returning from abroad was the success of the local companies Tigar and Prvi Maj Pirot. Also, they had acquired formal education, unlike the people from Kučevo, whose mother tongue was Vlach. Generations of Vlachs born before the 1950s "didn't know a single word of the Serbian language", and many of them never completed primary education. Elders did not allow children to attend school because they needed labor on their farms. Another reason for dropping out of education was the existing ban on the Vlach language in schools (Durlić 2020).

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[5] Petrija Repedžić, Milenko Petrović, Branislav Repedžić, Katarina Strešić, Milutin Šalarević, Ruža Adamović, Đorđe Adamović, Božidar Šalarević and many others.

On the other side, in Ponišavlje, according to V.J. (b. 1944) from Pirot, a native of the village of Nišor, the main reason for returning from abroad was the development of the Tigar tire factory: "I went to France; I worked there as a bricklayer, we struggled, we all lived in one apartment, and we were there for several years; many of us from Pirot went to France, but we all returned and started working at Tigar".

In the village of Gostuša, during the celebration of the village patron saint, interviews about the reasons for leaving the village were conducted with several interlocutors. Here are some of the most indicative parts:

> Why should we stay in the village? When Tigar started working, many left, but we also had a lot of sheep, and now imagine, I have no road, and a guy who works at Tigar comes by car. So, I am a shepherd, and he tops up a full car of sheep and leaves. And he got an apartment from the company! Of course we all wanted to leave; many went to Pirot, but they also went to France, and when they came home, they were the bosses. There were 100.000 sheep in Vrtibog; there was also dairy, hard work. He came, you were struggling, and he took what you were struggling for; we didn't have a road; there was no road then, and the bus left us in Lukanja. Many had to walk to Pirot. Now we gather to celebrate the holiday, and we are coming back, he came from Belgrade to celebrate the patron saint, and he left a long time ago. There is no one in the village, what is there, when you don't have a store, you have nowhere to buy things. What is there to return to? We didn't invest in the house, just basic maintenance now and then. What should I invest in when it is this old, for whom, there are no tourists, no one passing by. These weekenders come, they come for the weekend to mow a bit and that's it.

Better living standards in the city and guaranteed housing and prestige created the preconditions for emerging differences in migration, as well as in the relationship of the population of these two areas with their place of origin. In Ponišavlje and Stara Planina, we now have "weekenders" who live and work in Pirot but visit their old houses occasionally. For example, in Pakleštica, houses are being renovated, but no new ones are being built; the facades of most houses in the village have been repaired, which is not the case with other Stara planina villages. When asked "Why is it like that?", the inhabitants of Stari Zavoj, J. K. (b. 1961) and V.M. (b. 1947), answered that "they were more educated". This shows a distinction between *us* and *them*, i.e., the educated vs. the uneducated, the "inner others". We can also notice "inner others" in Kučevo, whose presence is reflected in the construction of multi-storey houses and overdecorated courtyards, mausoleums, etc. In Kučevo, there was constant awareness that work abroad was temporary and that they would return. This was supported by the existence of renovated rural houses and new ones built under Western influences, forming a new ethnological-architectural phenomenon typical for guest workers in north-eastern Serbia, in contrast to south-eastern Serbia, where native houses were not renovated but abandoned (Image 1).

Image 1. Decoration on a courtyard gate in Brodica (Kučevo) and the street view in Rsovci (Pirot).
Source: Private archive of Vladimir Petrović, and https://planine.net/wp-content/uploads/2018/08/DSCN00081.jpg

During the industrialization process, mass emigration from Pirot villages to the city enabled a permanent solution to these people's housing problems through the allocation of publicly owned apartments. These apartments could be bought into private ownership during the 1990s, making their emigration permanent. Migrants who made new homes in the city erased all traces of the impermanence of their migration and the sanctuary symbolism of the place of origin, mostly forever turning their backs on their birth homes, which had typically fallen into disrepair after decades of non-maintenance. On the other hand,

in almost all Kučevo villages, according to the testimonies, the reason for building large houses was to leave a house for future generations to live comfortably and not struggle as the previous generations had done.

5. *Discussion*

Migration from the villages of Pirot and Kučevo has its demographic and ethnological aspects. The demographic consequences of long-lasting migrations in both SGUs are manifested in the intensive demographic aging and emptying of the villages. The region of Southern and Eastern Serbia is the starting point of the most numerous emigrations in our country, accounting for more than 35% of total emigration (Bašić 2015). On the other hand, the ethnological change reflected in the migrants' identity transformation is best manifested by their changed relationship to their place of origin. International migrants' investment in houses later became disproportionate and eccentric, as they continued to invest in bigger and bigger houses, resembling towers and castles. These structures conspicuously stand out in the village, signalling a message to the community about the family's wealth acquired in the West (Antonijević 2013). In contrast, internal migrants, like "pečalbari" decades ago, rarely showed such a need for status affirmation in their place of origin (Hristov 2015; Liubenov 2019).

The initial driver of migration in both areas was the suppression of sheep and goat field farming, but the characteristics of the migrants themselves were different. For example, according to the 1961 Census, in the Municipality of Kučevo, 46% of the population over the age of 10 had no schooling, and 36% were illiterate, whilst in Pirot, the corresponding shares were 33% and 22%. The extremely unfavorable educational structure and high illiteracy rates in the Kučevo villages made its inhabitants an undesirable labor force in the relatively scarce Kučevo industry. Essentially, the root of the "unequal employment opportunities" of the population of the Kučevo region was not knowing the Serbian language and the widespread resistance of the Vlachs of that time to education in the Serbian language (Durlić 2020). In addition to the usual economic motives, emigration flows are also influenced by cultural and linguistic closeness with compatriots in the home countries (Bašić 2015). However, it should be emphasized that nowadays, bilingualism (parallel use of the Vlach and Serbian languages) is almost universal among the Vlachs in Serbia (Knežević 2013; Bašić 2015; Durlić 2020). This type of "obstacle" to employment among the population from Pirot did not exist; however, during the 1960s, there was an initial emigration wave abroad, although less numerous than in Kučevo. It is interesting that in 1971, of the total number of emigrants abroad in the Municipality of Pirot, 56% started from villages, while in the Municipality of Kučevo, as much as 96% of persons working/staying abroad came from the countryside. In other words,

all emigration from the municipality of Kučevo started from the villages. Yet, the few people working/staying abroad from the villages of Pirot did not in any way mean a smaller volume of emigration, but rather that emigration mostly went towards the urban settlement of Pirot. For example, according to the 2002 Census, 35.2% of the population born in the villages of the Municipality of Pirot moved to the town of Pirot, while only 5.8% moved from the Kučevo villages to the urban settlement of Kučevo. As the urban settlement of Kučevo did not appear as an attractive destination, emigrants from rural areas predominantly went abroad or to other larger cities in Serbia. In contrast, due to the high concentration of industry and a high demand for labor, the City of Pirot literally "sucked in" the population of the surrounding villages, and any excess labor typically migrated to larger economic centers in the country, but not abroad, as they did not struggle with a language barrier and had a better qualification structure.

Processes of industrialization and urbanization were significant drivers of migration. Still, the shift of the population from agricultural to non-agricultural activities after World War II did not have too much of an impact on the Vlachs in the country, who rarely left rural areas. Thus, according to the last five population censuses, the share of the rural population among Vlachs ranged between 84% and 92%, reaching as high as 92.3% in Kučevo in 2022. The scale of the rural exodus in these two SGUs is especially apparent in the migrant structure of the male population, because 86% of all household heads of rural households in Southern and Eastern Serbia are men. This is particularly indicative of the high prevalence of the patriarchal model in the rural environment in Serbia, where the heir of the "lineage" and the family farm is almost always a male descendant (Rajković 2014). The censuses of 2011 and 2022 recorded that in the Municipality of Kučevo, more than four-fifths of men have lived in the same place since birth, while in the City of Pirot, this share was about two-thirds. However, given the rarity of male migration from the city to the countryside, it could be that only 11% of rural men moved to the urban settlement of Kučevo, while as many as 40% of all rural men moved to the City of Pirot. We can connect this phenomenon in the Pirot area to the centuries-old need of the highland population, due to the scarcity of resources, to go to the lowlands either seasonally for "pečalba" or for permanent settlement (Krstić 2022). Emigration from the Pirot villages was already very intense in the first observed decade, accounting for half of the entire migration loss of rural areas, and the permanent character of these migrations is confirmed by the few returnees. In terms of identity, the move from the village to the nearby city did not represent a drastic change that would trigger a strengthening of the connection with the place of origin as a key point of identity preservation. Also, the temporal distance of leaving the place of origin made this connection even weaker. Internal migration from villages to cities typically resulted in an identity dilemma that waned over time under the influence of the

city as an effective means of acculturation, the transition from rural to urban identity, and the weakening of the connection with the place of origin (Erman 1998; Creed & Ching 1997).

As for international migration, the main senders of remittances are first-generation migrants investing in the purchase of land, the construction or purchase of real estate, or the reconstruction of existing facilities and planning their return to Serbia (Lerch et al. 2007). Migration from the Kučevo villages flowed abroad with an initial wave of emigration similar in intensity to the one that continued until the end of the 20th century, resulting in a vast majority of first-generation migrants. Additionally, the scope of the return stream far exceeds the corresponding phenomenon in the Pirot region, reaching as much as 11.5% of the total population in the country in 2022. The idea of "temporariness" of going abroad, although not fully realized, never ceased to exist. This is especially noticeable in efforts to preserve identity abroad and to showcase one's "success" in the homeland (Antonijević, Banić Grubišić & Krstić 2011). Attachment to a place is an important identity weft in modern society, but regardless of depopulation, it stands out as a specific resource potential of small settlements (Petrović, Backović & Petrović 2017). Guest workers have adopted the values of Western culture, criticizing the poor working habits and conservatism of their compatriots in the place of origin. With their new identity, they see themselves as more valuable and closer to foreigners, striving to stand out from their compatriots by excessive house-building and luxury consumption (Toma 2020; Antonijević, Banić Grubišić & Rašić 2021). Socio-economic and socio-psychological factors of the demographic behavior of the Vlachs, which were manifested as a desire for a wealthier lifestyle through the traditional "one child" model from the end of the 19th century (Knežević & Gligorijević 2023) up to the modern "guest workers" in the middle of the last century, exclusively originated from the village because the Municipality of Kučevo never evolved into a center of economic development and social transformation in terms of defining standards, ethical norms, and demographic behavior ideals. The specific demographic behavior of the Vlach population, in addition to the undeniable economic motive, certainly has a deep-rooted and multi-layered ethno-anthropological, cultural, and historical basis.

6. Conclusion

Demographic change highly influences the transformation of the local environment through natural and migration patterns. In this text, we have unequivocally shown that the features of migration in the two observed local environments had an almost opposite effect on the relationship of migrants with their place of origin and birth home. However, the roots of this different relationship did

not stem only from the researched modern migration, but went back to the distant past, which also saw migration shifts. There was already a long tradition of "pečalba" in Pirot, which fostered a certain propensity of the population to leave their home place. In the descriptions of the Šopska and Moravsko-Vardarska migration currents, the tendency of this part of the population to easily break ties with their homeland was highlighted as an important ethno-psychological characteristic. Conversely, the population of the Kučevo region, though itself a product of earlier migrations, was disinclined to migrate in the last two centuries until modern times. In the early 1960s, both SGUs were mostly rural, so the main transformation of the local environment began precisely in the villages. Regardless of the initial migration abroad, the rural population of Pirot found their destination in the rapidly industrializing urban settlement itself, which was not the case with Kučevo. The population of the Pirot villages was better educated, while the predominantly Vlach population of the Kučevo villages was highly illiterate and had no formal education. One of the causes was not knowing the Serbian language and dropping out of school, resulting in non-competitive employment opportunities in the industry of Kučevo. At the very beginning of the observed period, the population of the Pirot villages left their place of origin en masse, finding jobs in the local industry and building a new life in the city, while the inhabitants of the Kučevo villages took advantage of the opportunity of legal labor migration and began their decades-long migration abroad.

The answer to the question of the different relationships with the place of origin and the birth home may lie in the formation of the specific identity of the migrating population. The population that left the Pirot villages did not go far. Their migration took on a permanent character. They were among their own people in the city, using the same language and building permanent new lives. The myth of returning to the birth home was never a part of the migration process in the Pirot area. Conversely, the population of the Kučevo villages went abroad with the intention of not starting a new life but improving their old one. Although their migration took on the appearance of permanence, the idea of returning was always an integral part of their lives, wherefore they invested in their family homes in the place of origin. Living abroad made their connection with the homeland an important identity feature. On the flipside, they became "internal others" in their homeland, materializing the meaning and purpose of their departure through excessive and irrational investment in housing construction.

Through a unique combination of demographic and ethnological methods, we utilized demographic analysis to provide solid evidence for understanding and explaining ethnological phenomena of identity transformation. Scientific examples of the simultaneous use of quantitative demography and qualitative ethnology in describing the process of rural area transformation in Serbia are scarce. Such an approach arguably benefits both perspectives, the demographic

and the ethnological. Not only demographic characteristics of actors, but also the geographical characteristics of their migrations, shaped their identity and relationship with the place of origin. Nevertheless, this micro-environment case study (exercise) has its limitations and shortcomings, as seen in the lack of in-depth geographical analysis. Future research of similar processes should include relief and altitude comparisons between villages, traffic connections, and soil characteristics as geographical factors relevant to agricultural activity and rural life, as well as important drivers of shifts in the locals' economic activity and migration patterns.

The similarity in unfavorable demographic characteristics of the villages in these two areas of eastern Serbia and the obvious differences in the appearance and wealth of individual farms prompted us to attempt to discover the primary cause of the different relationship of the population with their birthplace. It is hard to compare these research results with similar studies (and other parts of Serbia) without an in-depth historical, geographical, and social understanding of the local environment. However, if we do attempt a comparison, we must not go beyond comparable historical-geographical and socioeconomic entities. It would be insightful to identify the drivers of different relationships of migrants with their place of origin, for example, between Banat and Srem, Šumadija and Pomoravlje areas, or between the Serbian and Romani population or the Serbian and Hungarian.

To conclude, the demographic fate of the Pirot and Kučevo villages is probably similar, but there are now obvious differences in the appearance of these villages, architecture, and the degree of poverty. The Pirot villages have not undergone significant transformation in the last 60 years; new residential construction is rare, and people live in old houses. On the other hand, "bačije" and "čatmare" (houses made from timber and mud), ubiquitous in the pictures of the Kučevo villages from the early 1960s, are rare today. Much of the scarce population and returnees to the villages of Kučevo spend their lives surrounded by plaster lions and eagles who watch them from monumental courtyard gates, sequestered in spacious houses with colorful facades. On one side it is "čatma", stone and chaff, and on the other, marble, wrought iron, and video surveillance of the newbuilds.

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Mihailo Vojvodić
(1938–2025)

Mihailo Vojvodić was a distinguished scholar and dedicated academic. Professor Vojvodić's research focused on what is perhaps the most intriguing period in the modern history of Serbia: the age in which the Serbian national identity was forged in the modern sense (from 1878 to 1914). During his long career, he sought to unravel the intricacies of the foreign policy aspect of this process, in which Serbia's independence, as established at the Congress of Vienna, set the stage for the development of its institutions, civil society, military and, most significantly, the transformation of the Serbian peasantry into citizens and conscripts of the Serbian state who wholeheartedly embraced the objectives of the Serbian nation.

Professor Vojvodić's academic journey, which led him to the study of the diplomatic, political and cultural history of Serbia at the turn of the 20th century,

commenced in his native Cetinje, where he was born in 1938 and completed secondary education in 1956. In the same year, he enrolled at the Department of History at the Faculty of Philosophy, University of Belgrade, from which he graduated in 1960. A year later, he became a teaching assistant at the Department for History and began his postgraduate studies, acquiring a Master's degree in 1964. He pursued postgraduate studies in France during the 1964/1965 academic year. He obtained his PhD from the University of Belgrade in 1966. The following year, he became an active member of the History of Modern Europe Department at the School of History under the supervision of his mentors, professors Vasa Čubrilović and Jorjo Tadić, along with his older colleague, Professor Radovan Samardžić, and his colleagues Dragoljub Živojinović and Andrej Mitrović. His academic career followed the established path, and he became a full professor at the School of History in 1980.

His PhD thesis, which focused on the so-called Skadar Crisis[1]—the conflict between Montenegro and Serbia on the one hand, and Italy and Austria-Hungary, the protectors of the nascent Albanian state, on the other—over control of the town of Skadar, outlined the first main topic of his research. The geopolitics of the Balkans on the eve of the Great War created the foreign policy context in which the two Serbian states had to operate in their quest to liberate the region from Ottoman rule. Professor Vojvodić wrote about the diplomatic history of Serbia and Montenegro's relations with the great powers of the early 20th century, focusing on the two major issues: the Annexation of Bosnia in 1908 and the First Balkan War of 1912. He also edited and published the relevant volumes of Documents on Serbia's Foreign Policy.[2]

Professor Vojvodić was also interested in the evolution of the struggle that led to the liberation of the Balkans from Ottoman rule during the Balkan Wars. In the last decades of the 19th century, the history of the Balkans was marked by a status quo backed by the two major regional powers, Russia and Austria-Hungary. This made it virtually impossible for the Balkan nations to challenge Ottoman rule. The interplay of diplomatic and cultural initiatives in favour of Serbs living in the Ottoman Empire formed the focus of Professor Vojvodić's research, as presented in his seminal work on Serbia's foreign policy

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[1] M. Vojvodić, *Skadarska kriza 1913. godine* [The Skadar Crisis of 1913] (Belgrade: Zavod za izdavanje udžbenika Socijalističke Republike Srbije, 1970).

[2] *Dokumenti o spoljnoj politici Kraljevine Srbije: 1903–1914* [Documents on the Foreign Policy of the Kingdom of Serbia: 1903–1914], knjiga 5 (1–3), 1/14. januar – 31. decembar 1912/13. januar 1913 (Belgrade: Serbian Academy of Sciences and Arts, 1984–1986); *Dokumenti o spoljnoj politici Kraljevine Srbije*: *1903–1914* [Documents on the Foreign Policy of the Kingdom of Serbia: 1903–1914], knjiga 3 (1–5), 1/14. januar 1908 – 31. decembar 1909/13. januar 1910. godine iz fondova Arhiva Srbije (Belgrade: Serbian Academy of Sciences and Arts, 2010–2014).

at the turn of the 20th century.[3] In this study, he identified Stojan Novaković, a historian, diplomat and politician, as the driving force behind the new Serbian strategy of cultural initiative based on good relations with the Ottoman Empire. Professor Vojvodić dedicated several books to Novaković's efforts and edited his principal works for publication.[4] In a series of articles on the history of Serbs living in the Ottoman Empire, Professor Vojvodić focused on Serbian communities in the Vilayet of Kosovo. The history of relations between Serbia and Montenegro after the Great Eastern Crisis of 1875–1878 was also one of Professor Vojvodić's favourite topics, leading him to examine the relations between the two Serbian states and the Great Powers.

Professor Vojvodić taught History of Europe in the 19th century at the Department of History, chairing the department from 1988 to 1990 and serving as Dean of the Faculty of Philosophy from 1998 to 2000 during particularly challenging times. Professor Vojvodić had to deal with the reaction of the faculty to a newly promulgated law that limited university autonomy. Teaching staff were required to sign new employment contracts, thereby implicitly accepting the new law, while refusal meant losing their jobs. He took a public stand against this, stating that if any faculty members were to be fired, he would be the first to go. He retired in 2006, respected by his peers and acclaimed by his students. Besides the University of Belgrade, he also taught at the University of Banja Luka and the University of East Sarajevo.

Professor Vojvodić was made a corresponding member of the Serbian Academy of Sciences and Arts (SASA) in 2009, becoming a full member in 2015. This marked a new chapter in his academic career. He played an active role in a series of research initiatives organised by the Academy, including hosting conferences on the Balkan Wars and the Great War. He was a member of multiple SASA committees: the Vardar Committee; the Committee for the History of Serbia in the 19th Century; the Committee for the History of the 20th Century; the Committee for the Study of the Origin of the Kingdom of Serbs, Croats and Slovenes (1914–1918); and the Committee for the History of Serbian–Russian Relations. He was President of the Committee for the Study

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[3] M. Vojvodić, *Srbija u međunarodnim odnosima krajem XIX i početkom XX veka* [Serbia in International Relations at the End of the 19th and Beginning of the 20th Century] (Belgrade: Serbian Academy of Sciences and Arts, 1988).

[4] M. Vojvodić, *Petrogradske godine Stojana Novakovića, 1900–1905* [St. Petersburg Years of Stojan Novaković, 1900–1905] (Belgrade: Istorijski institut, 2009); M. Vojvodić, *Stojan Novaković: u službi nacionalnih i državnih interesa* [Stojan Novaković: in the Service of National and State Interests] (Belgrade: Srpska književna zadruga, 2012); M. Vojvodić, *Samo svojim putem: Stojan Novaković u skupštinskom i javnom životu Srbije: 1905–1915* [Along His Own Path: Stojan Novaković in the Parliamentary and Public Life of Serbia: 1905–1915] (Belgrade: Filip Višnjić, 2015).

of Kosovo and Metohija. He was also editor-in-chief of two SASA journals: *Kosovsko-metohijski zbornik / Recueil de Kosovo et Metohija* and *Glas odeljenja istorijskih nauka / Glas - Classe des sciences historiques*.

Vojvodić served as Secretary of the Department of Historical Sciences at the Serbian Academy of Sciences and Arts (2016–2024), a member of the Board of Directors of the Serbian Academy of Sciences and Arts Fund, and a member of the Presidency of the Serbian Academy of Sciences and Arts (2016–2024). From 2014, he was a member of the Board of Directors of the Institute for Balkan Studies of the Serbian Academy of Sciences, chairing it from 2017 until his passing. During his tenure as President of the Board of Directors of the Institute for Balkan Studies of the Serbian Academy of Sciences, he provided wholehearted support and academic guidance, which was of crucial importance when the Institute participated in multiple national and international projects and maintained an active publishing schedule.

Professor Vojvodić will be remembered by his colleagues and students as a devoted and thoughtful academic who always made time for others. At the Archives of Serbia and the Department of History at the Faculty of Philosophy, University of Belgrade, he mentored generations of students researching the history of Serbia and Europe from the French Revolution to the end of the First World War. He was a renowned expert for the period from the Great Eastern Crisis to the Great War. Above all, he was a warm and kind person who was attentive to others and always ready to support his colleagues and students.

Vojislav G. Pavlović

REVIEWS

Bernard Lory, *Les Tsiganes des Balkans (1280–1914)*.
[The Gypsies of the Balkans (1280–1914)].
Paris: Les Belles Lettres, 2024, 688 p.

Reviewed by Mirjana Mirić*

Bernard Lory's book *Les Tsiganes des Balkans (1280–1914)*, written in French, is an ambitious documentary collection offering important insights into the history of the Roma in the Balkans. Comprising 157 documents, the volume spans from the first mentions of Roma in Byzantine sources of the late 13th century to the beginning of the First World War, focusing on the centuries under Ottoman rule and the 19th century, when documentation becomes increasingly abundant. Lory, a distinguished historian of the Balkans, has gathered, translated, and commented on sources originally written in numerous languages, including Byzantine Greek, Ottoman Turkish, Latin, Serbian, Croatian, Bulgarian, Macedonian, German, English, and others. His motivation stems from the fact that the Roma have been largely neglected in Balkan historiography: while sources on the Roma in Western Europe are abundant, documentation on the Roma in the Balkans is scarce and still awaits thorough analysis. Lory's aim is twofold: to make accessible the dispersed and fragmentary records of Roma in Southeastern Europe, and to correct the long-standing problem of uncritical repetition of unverifiable claims in Romani historiography.

In terms of geography, the volume covers all Balkan lands except for present-day Romania, which Lory deliberately excluded due to the complex situation and the existing specialized historiography on slavery and the Roma in that region. Yet he occasionally includes important Romanian sources when they relate to Roma in Wallachia and Moldavia and to the communities dispersed across the Balkans. The author consistently uses the term "Tsiganes" ('Gypsies') throughout the book, following the common

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historical practice of employing the terminology found in the sources. This term is prevalent in Ottoman-period documents and is also among the oldest ethnonyms attested in the Balkans.

Chronologically structured, the book includes four large parts: 1) *1280–1481*, 2) *La grande époque ottomane (1481–1699)* ('The Great Ottoman Era (1481–1699)'), 3) *Un curieux XVIII^e siècle* ('A Curious 18th Century'), and 4) *Le XIX^e siècle, « âge classique » de l'histoire balkanique* ('The 19th Century, the "Classical Age" of Balkan History'), preceded by a concise introduction and followed by a conclusion, the annex titled *Les Tsiganes des Balkans : combien?* ('The Roma of the Balkans: How many?'), glossary, bibliography, and detailed geographical and thematic indexes. This structure reflects the logic of the sources: sparse in the medieval centuries, abundant under Ottoman rule, then shaped by the rise of nation-states and modern categories of ethnicity in the 19th century. Each source is introduced with its historical context and information about the author (when known), followed by a reference and an extended commentary on the document's content, terminology and interpretations, and is also situated within a broader social, political, and historical framework.

The first part of the volume *(1280–1481)* presents 22 sources in Romani historiography, including hagiographies, Byzantine canons, charters, and early travelogues. These diverse late medieval sources trace some of the earliest mentions of Roma in the Balkans, though their reliability varies widely, according to the author. Lory critiques the tendency among researchers to accept the earliest mentions of Roma as attestations of their presence in the Balkans as early as possible. For instance, discussing *The Life of George the Hagiorite* (1047–1055), the reference to "Athinganes" is interpreted as referring to a Byzantine sect attested in the 8th–9th century rather than the Roma, challenging earlier assumptions. Similarly, the term "athingganoi", first introduced around 1200 by Theodore Balsamon in his commentary on Canon 61 of the Council in Trullo (692), did not, according to Lory, have an ethnic connotation. The author also questions the interpretations of the charter (chrysobull) of Stefan Dušan (1348), arguing that although Roma may have been present at the time in Serbia, they were neither numerous nor recognized as a distinct people. While some of Lory's arguments lack robust evidence and remain speculative, his critical assessments highlight the fragility of existing historiography and the need for a more careful approach to Roma identity and status during this period.

The 14th- and 15th-century records portray Roma as sedentary, socially integrated, and largely working as craftsmen, musicians, or ironworkers, while other accounts, such as those of Western pilgrims, often depict them as nomadic, impoverished, or even threatening. Monastic charters from Wallachia and Moldavia attest to Roma families tied to estates, while Ottoman registers from the Sofia region and Nikopol show them as taxable communities. The last document analyzed in this part of the book is an excerpt from the *Kanunname*, a legal code concerning the Yörüks and Roma in Rumelia during the reign of Mehmed II (1451–1481), which regulated their taxation and obligations in the Ottoman Empire. Classified separately from other populations, Roma were subject to special taxes, strict registration, and close supervision due to their

mobility and economic activities. The conflicting depictions presented in the medieval sources reflect not only the diversity of Roma livelihoods, ranging from craftwork to executioners, but also the shifting symbolic and social roles assigned to them.

The second part of the volume, *La grande époque ottomane (1481–1699)*, presents 41 documents, covering two centuries for which archives provide important data on Roma communities. With the consolidation of Ottoman administration in the Balkans, the number and quality of sources increased dramatically. Ottoman administrative and tax registers (defters) from the late 15th and 16th centuries offer demographic precision unparalleled in Western Europe at the time. Beginning with the consolidation of Ottoman authority after Mehmed II died in 1481 and ending with the Treaty of Karlowitz in 1699, the sources include fiscal registers, censuses, and legal codes that document both Muslim and non-Muslim Roma in the Balkans. These documents, ranging from capitation tax records in 1490–1491 and the Balkan census of 1523 (encompassing 13,000 Roma families) to laws under Suleyman the Magnificent and various tax registers, offer precise data on the Roma population size, family structures, occupations, settlement patterns, and religious conversions. These sources reveal the duality of Roma status: on the one hand, fiscal burdens and stigmatization (special taxes, restrictions on intermingling between Muslims and Christians, association with marginal trades); on the other hand, recognition of their economic usefulness, whether as ironworkers in Belgrade (privileged in terms of taxes, as seen in records from 1536–1560), miners in Bosnia (1574), musicians in imperial ceremonies (Budapest, 1584), or butchers in Bitola (1634). The evidence Lory assembles reveals that by the 16th century, most Roma were sedentary, concentrated in urban centers such as Belgrade, Sofia, and Bitola and their suburbs, or in specialized rural enclaves, though some remained nomadic. The Ottoman documents also register the religious dynamics of Roma communities, including conversion to Islam. Administrative measures, including the creation of the *Gypsy Sancak*, an Ottoman administrative unit in Rumelia entirely devoted to Roma, point both to the demographic significance of Roma and the Ottoman state's efforts to monitor mobility and regulate social behavior. In this part, Lory challenges the stereotype of Roma as mainly nomadic and socially marginal.

The third part, *Un curieux XVIII^e siècle*, presents 24 documents reflecting a transitional era. While the 17th century ended with the decline of Ottoman power, the 18th century brought about important administrative reforms. Documentation is less abundant than in the preceding centuries, yet it remains significant. Lory presents materials that show both continuity and change: Roma appear in taxation records, censuses, accounts of local conflicts, and descriptions by Western travelers. Their occupations diversified, and the balance between sedentary and mobile groups remained an object of administrative concern. Particularly interesting is the persistence of stereotypes about Roma as thieves, spies, or irregular soldiers, even though the actual administrative sources show them more commonly as artisans or musicians. The 18th century also marked a growing interest of European observers in Roma, reflecting Enlightenment attempts to classify

people but also to exoticize them. In addition, this section looks at some of the pioneering scientific works that include Roma. For instance, Lory discusses the work of the German scholar and historian Grellmann in the 1780s. Although criticized for its stereotypical view, Grellmann sought to understand Roma, historically and geographically, and was one of the first to emphasize their Indian origin (following Rüdiger). Overall, the author stresses that this century cannot be overlooked in the history of Roma, as it shaped the categories that would later influence 19th-century national administrations.

The fourth part of the volume, *Le XIX^e^ siècle, âge classique de l'histoire balkanique*, comprises as many as 70 documents, showing that the 19th century marked a turning point in the historical knowledge of Roma in the Balkans. The author relies on a variety of sources, including Ottoman fiscal registers and administrative correspondence, Austro-Hungarian and Serbian municipal records, legal petitions, as well as ethnographic and linguistic studies (e.g., by Paspatis, Kanitz, Miklosich, Colocci), autobiographies, local chronicles and memoirs (e.g., by Prota Mateja Nenadović in Serbia), letters, travelers' reports (e.g., Knight on the Roma in Shkodra, Barbanti-Brodano on "White Gypsies" in the Serbian town of Šabac), and even newspapers (*Radničke novine*). This combination allows for both a reconstruction of official policies affecting Roma and the identification of less stereotyped social realities.

The period of conflicts, particularly the Russo-Turkish War (1877–1878), the Balkan Wars (1912–1913), and numerous localized uprisings, shaped the Roma experience. Testimonies and administrative reports reveal that Roma were often caught between warring groups, experiencing both victimization and opportunistic involvement. In the Bulgarian Uprising of 1876, for instance, Muslim Roma in Koprivštica were massacred, while in other villages they managed to survive. Accounts from Skopje and other towns during the Balkan Wars show that Roma frequently migrated in response to changing taxation and wartime instability. In addition, bureaucratic modernization under the late Ottoman Empire and emerging Balkan states introduced new forms of control over Roma communities. More strict census policies, identity cards, and military service registration marked a shift from flexible social arrangements to codified legal status. Finally, urbanization influenced Roma settlement and economic patterns. In cities such as Sofia or Thessaloniki, municipal authorities concentrated Roma into specific quarters, reshaping traditional spatial arrangements and economic roles. While some adapted successfully, maintaining crafts, music, and trade, others faced marginalization and poverty, as witnessed in accounts of beggary and informal labor. Ethnographic observations also note the persistence of cultural practices, such as fortune-telling, festival observances and rituals (e.g. *kurban*), which remained markers of identity even in the context of rapid social change. As for specific Roma groups, Lory particularly discusses the migrations of Kalderash, which are, according to him, neglected in historiography. Together, the presented sources provide a nuanced picture of Roma communities in a period of transformation across the Balkans.

In addition to analyzing the available documents from a historical perspective, Lory devotes some sections of the volume to discussing linguistic sources and their

place in Romani studies (see, among others, pp. 134–135). Linguistic evidence allowed for the reconstruction of origins and identification of the Indian origin of the Romani language and the subsequent dialectological work mapped the dispersion of Roma groups across Europe. According to the author, since the 18th century, the linguistic approach, pioneered by Franz Miklosich and followed by generations of scholars, has dominated attempts to trace Roma migrations and history. Lory, however, notes the limitations of this approach. He stresses that linguistic data are essentially synchronic (pp. 12, 252, 425), unable, on their own, to provide a historical narrative. The "Great Divide" theory (Lory cites Matras 2014), which posits a split between Romani dialects around the 15th and 16th centuries, is also examined critically (p. 134). Nevertheless, the author's criticism of linguistic accounts appears unfounded, as he largely overlooks numerous contemporary studies in Romani linguistics (see Matras & Tenser (eds.), 2020). This oversight remains the main critical point of the book. Contemporary Romani linguistics bases its conclusions not only on the Indian origin of Romani, but also on the presence of Roma in particular regions and the timeline of their migrations, on a scientific comparative method. This approach allows linguists to compare Romani dialects with each other and with other languages to identify both inherited Indian vocabulary and loanwords borrowed from various contact languages. The quantity and persistence of these loanwords in the common lexicon across Romani dialects provide crucial evidence of the duration of contact between Roma and the speakers of those languages. The example of Turkish and Armenian loanwords serves as an illustration, since Lory mentions the Turkish borrowings in Romani dialects (p. 135). According to Scala, the common Romani lexicon contains no definitive Arabic or Turkic loanwords, indicating that contact with these languages was either nonexistent or insignificant, due to geographical, sociolinguistic, or chronological factors. The lack of Turkic borrowings in the lexicon shared by all Romani dialects, together with the dating of Armenian loanwords to before the 11th century, implies that the Romani migrations through Asia took place before Turkic groups had settled in Iran and Armenia (Scala 2020, 91). The influence of Turkish on particular Romani dialects is unquestionable (Friedman 2020), but determining diachronic paths relies on shared, common vocabulary across Romani dialects. Furthermore, recent linguistic studies allow us to establish the presence of Roma in Armenia before the 11th century, based on "some phonetic evidence (notably the reflexes in Romani of the Arm. lateral / and of the occlusives and affricates) [which] suggests that contact between Romani and Armenian took place before the eleventh century and that Armenian loanwords were acquired from a variety of Armenian that is fully compatible with Old Armenian and with the modern eastern dialects of the Armenian continuum, but not with the western ones, spoken till the beginning of the twentieth century, in Eastern Anatolia" (Scala 2020, 100–101).

Overall, *Les Tsiganes des Balkans (1280–1914)* represents an important contribution to both Romani studies and Balkan historiography. Its value lies in the wide range of sources, drawn from multiple languages and translated into French, and in the author's careful contextualization of each document. Lory positions

his work slightly outside the conventional academic framework, as he acknowledged in one of his interviews (available at: https://regard-est.com/thinking-of-the-balkans-as-a-whole-interview-with-bernard-lory-historian-of-margins-and-mediation). For students and scholars, the book underscores the importance of engaging directly with historical sources and re-examining long-standing assumptions. Moving away from common stereotypes, the book presents Roma as active participants in the economic, social, and cultural life of the Balkans over six centuries, offering a foundation for what may eventually become a comprehensive history of Roma in the Balkans.

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Mihailo Vojvodić, *Balkanski rasplet: otpor Srbije stranim interesima na Balkanu (od Aneksione krize do Velikog rata)*

[The Balkan Unraveling: Serbia's Resistance to Foreign Interests in the Balkans (from the Annexation Crisis to the Great War)].
Belgrade: Institute for Balkan Studies SASA, IP Clio, 2024, 238 p.

Reviewed by Đorđe M. Đurić*

In his book *Balkanski Rasplet* [The Balkan Unraveling], Mihailo Vojvodić, a member of the Serbian Academy of Sciences and Arts, examines Serbia's foreign policy during the turbulent period from the Annexation Crisis to the beginning of World War I. While working on publishing documents on Serbia's foreign policy from 1903 to 1914 within a multi-volume collection, the author drew on materials from domestic archives related to this period, which form the basis of this monograph. The book includes a preface, introduction, nine chapters divided into subsections, and a conclusion.

In the introduction, the author briefly outlines the changes in Serbian foreign policy that occurred after the Congress of Berlin. In pursuing its national aspirations, Serbia no longer relied on Russia, as it had done before the Congress of Berlin, but on Austria-Hungary, a foreign policy shift confirmed by the signing of the Secret Convention in 1881.

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This new orientation meant that Serbia would relinquish its claims to Bosnia and Herzegovina, which had been occupied by Austria-Hungary, and redirect its territorial ambitions toward Old Serbia and Macedonia. After the May Coup, there was another shift in Serbian foreign policy. Serbia once again sought support for its national aspirations from Russia, leading to a deterioration in relations with Austria-Hungary and increasing pressure from the neighboring monarchy.

The first chapter, titled *The Annexation Crisis*, discusses the annexation of Bosnia and Herzegovina by Austria-Hungary, arguing that the Young Turk Revolution directly triggered Austro-Hungary's declaration of annexation of Bosnia and Herzegovina. The Austro-Hungarian Foreign Minister, Aehrenthal, cited two reasons to justify the annexation: Greater Serbian propaganda and the proclamation of constitutionalism in Turkey. Since the annexation violated Article 25 of the Treaty of Berlin, this act caused concern among other powers and the countries whose interests were directly affected. Serbia, whose vital national interests the annexation encroached on, opposed such a solution. However, after their defeat in the Russo-Japanese War, the Russians were unable to fully support Serbia. Saint Petersburg advised Serbia to exercise restraint, promising diplomatic support for territorial concessions. For its part, Austria-Hungary sought to come to a direct agreement with Turkey, thereby presenting the other powers with a fait accompli. Turkey accepted the annexation, and Austria-Hungary withdrew its troops from the Sanjak of Novi Pazar. Under German pressure, Russia ultimately agreed unconditionally to the annexation, promptly followed by Serbia, with its government forced to declare that its interests had not been violated by the annexation.

Chapters II–VI (*The Foreign Policy of the Government of Stojan Novaković: Stabilizing Serbia's Position in the Balkans, The Policy of the New Government of Nikola Pašić: Strengthening Serbia's International Position, Serbia's Response to Developments in the Balkans and Newly Formed Movements, Pašić's Policy of Strengthening Serbia in the Balkans, Serbia's National Aspirations Directed at Bringing Balkan States Closer*) cover the period from the annexation of Bosnia and Herzegovina to the Balkan Wars. During this period, Milovan Milovanović served as Serbia's Minister of Foreign Affairs and, from July 1911, also as Prime Minister, playing a major role in shaping the country's foreign policy. His foreign policy program involved improving relations with Austria-Hungary, strengthening ties with Russia, establishing closer relations with Bulgaria and Montenegro, and monitoring the situation in Turkey, with which Serbia, for tactical reasons, needed to maintain good relations. The focus of Serbian diplomacy was on Turkey. Serbia sought to maintain friendly relations with Turkey to protect the rights of Serbs living there and implement large-scale infrastructure projects, such as the construction of the Adriatic railway. Moreover, Turkey's internal instability after the Young Turk Revolution constantly threatened to disrupt the status quo in the Balkans. Therefore, the Cretan Question, the Albanian revolts of 1910–1912, and the Italo-Turkish War preoccupied Serbian diplomacy.

The chapter *The Establishment of Alliances Among Balkan States and the Balkan Wars of 1912–1913* discusses the Balkan Wars. The author considers the Serbian–Bulgarian agreement the backbone of the

Balkan alliance, even though it did not resolve the disagreements about the future division of Macedonia but postponed their settlement to the period after the war, with the Russian Tsar as the ultimate arbiter. Negotiations with Greece were even more difficult. The main obstacle to forming an alliance was the Greek government's desire for the alliance to concern only Turkey, avoiding the obligation of joint action in case Austria-Hungary attacked Serbia, a condition Serbia insisted on. Thus, Serbia and Greece entered the war without a mutual alliance agreement. However, both had agreements with Bulgaria and Montenegro. The immediate cause of the war for the Balkan states was Turkey, where the local Christian population was subjected to constant violence. As another immediate trigger of the First Balkan War, the author highlights the initiative of Austro-Hungarian Foreign Minister Berchtold in August 1912 to decentralize Turkey. The Balkan allies succeeded in defeating Turkey in the war but did not fully satisfy their respective aspirations. The decision of the London Conference to create an independent Albanian state, which would border Montenegro to the north and Greece to the south, deprived Serbia of access to the sea, prompting it to request a revision of the agreement with Bulgaria. Unwilling to make concessions, Bulgaria opted for war instead of pursuing diplomatic negotiations. However, after Serbia's victory in the Second Balkan War, the Serbian-Bulgarian dispute was resolved in Serbia's favor.

The final two chapters, *After the Balkan Wars* and *Before the Great War*, minutely discuss the relations between Austria-Hungary and Serbia from the end of the Balkan Wars to the outbreak of World War I. Serbia sought to integrate the new territories and reduce the possibility of Austro-Hungarian interference in its internal affairs, as seen from its intention to conclude a concordat with the Vatican to lessen Austro-Hungarian sway over its Catholic subjects. At the same time, Serbia attempted to improve relations with Austria-Hungary, trying not to take actions that would meet with its disapproval. Despite this, Austria-Hungary's pressure on Serbia did not diminish, and the possibility of conflict between the two countries loomed constantly. In the autumn of 1913, war was avoided when the Serbian army withdrew from Albania after an ultimatum from Austria-Hungary, but the following year, Austria-Hungary used the Sarajevo assassination as a pretext for war against Serbia.

Finally, in the *Conclusion*, alongside the great powers' overlapping interests, the author identifies Austria-Hungary's expansionist policy in the Balkans as another major cause of World War I. Serbia was the main opponent of this policy, as Austria-Hungary aimed to surround and isolate it territorially. Austria-Hungary accomplished its objective by annexing Bosnia and Herzegovina and later creating Albania, cutting off Serbia from access to the sea. The author sees these actions as the causes of World War I, with the assassination of Archduke Ferdinand serving merely as a pretext.

Slobodan G. Markovich, ed., *Serbia and the Balkans: Three Centuries of Embrace with Europe*.
Belgrade: Zepter Book World & Faculty of Political Science, 2025, 451 p.

Reviewed by Anđelija Miladinović*

The volume *Serbia and the Balkans: Three Centuries of Embrace with Europe*, edited by Slobodan G. Markovich, is the final publication of the *Cultural Transfer Europe–Serbia (CTES)* project (2022–2025), financed by the Science Fund of the Republic of Serbia. Conceived as both a synthesis and a summary of a research effort spanning several years, the book encapsulates the project's ambition to rethink the long and complex relationship among Serbia, the Balkans, and Europe. It brings together contributions by distinguished international scholars—including Paschalis Kitromilides, Wolfgang Schmale, Vesna Goldsworthy, Misha Glenny, and Sonja Licht—and represents the culmination of an interdisciplinary dialogue that spanned history, literature, sociology, and political science.

At its core, the collection seeks to move beyond the simplistic dichotomy of "Europe versus the Balkans". Instead, it posits that a continuous and multidirectional flow of ideas, influences, and values shaped both regions over three centuries. The introductory essay by Markovich, "Serbia and the Balkans in Europe: Beyond Dichotomy", functions as both a conceptual and historical prologue. Markovich outlines the scope of the CTES project and situates the Balkans within the broader narrative of European intellectual and cultural history. Markovich frames Europeanisation as a dynamic process of interaction rather than imitation—one that re-admitted the Balkans into Europe's self-definition while allowing Serbia to serve as both recipient and contributor in the continent's cultural exchange. In his interpretation, the book's cover, featuring a painting from the National Museum in Šabac depicting the transition from military to civic values, serves as a visual metaphor for Serbia's shift from armed resistance to cultural dialogue.

The opening chapter, titled Europe, South-East Europe, and Serbia, addresses the intellectual underpinnings of Europe's relationship with its southeastern periphery. Paschalis Kitromilides's contribution, "There Is No Dichotomy between Europe and Southeast Europe", delivers a compelling argument against separating these two notions. He notes that the region's intellectual heritage, from Byzantine Christianity to the Enlightenment, is deeply enmeshed within the European civilisational continuum. Kitromilides calls for understanding Europe's unity in diversity through the concept of plural dialogues, insisting that modernity emerged through interlinked cultural channels rather than geographical hierarchies.

Wolfgang Schmale's comprehensive essay, "Once Upon a Time, When Europe Became a Man – 18th and 19th-Century Europe Conceptions", examines the gendered emergence of European identity during the Enlightenment period.

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Drawing on iconography, literature, and sociology, Schmale demonstrates how Europe's self-representation gradually became masculine, with civilisation, reason, and power defined as male attributes. His analysis extends from early allegories for the continent to 19th-century monuments of "Great Men", exposing the implicit Eurocentrism and gender bias that shaped modern European thought. Intriguingly, the study concludes by examining contemporary re-appropriations of Europe's image, from performance art to postcolonial visual culture, as a countergesture to the old patriarchal paradigm.

In "Modern Europe and Serbia", Markovich brings an extensive historical representation of Serbia's Europeanisation from the 18th century to the present. He proposes a new timeline for Serbia's Europeanisation, citing Dositej Obradović's era as a decisive turning point that brought Serbian intellectuals closer to the European mainstream. He identifies five stages of cultural convergence: Enlightenment reformism, Romantic nationalism, interwar Francophilia, socialist experimentation, and the post-2000 pro-European movement. The study addresses significant historical periods that shaped Yugoslav urban elites, ranging from Enlightenment influences and interwar Francophilia to post-1945 Sovietisation, socialist experimentation, and later cultural Americanisation. It also examines the conflict between isolationist nationalism and longstanding European aspirations, noting that even in the 1990s, a clearly "European Serbia" persisted. Despite periodic political rifts, the post-2000 resurgence of pro-European sentiment and civic initiatives in the 2020s reflects Serbia's long-standing and ongoing cultural ties with Europe. Markovich notes that Serbia's connection with Europe has never been solely political, representing instead a civilisational negotiation channelled through literature, education, and moral values.

Two more contributions—Dragana Grbić's "School Textbooks and Teaching Materials as Channels of Cultural Transfer in the Metropolitanate of Karlovci" and Goran Vasin's "Impact of the Ideas of the Enlightenment and of the Absolutist State"—focus on the Habsburg era as a crucial incubator of Serbian modernity. Dragana Grbić analyses the role of textbooks and educational materials that facilitated cultural mobility among Orthodox communities in the Habsburg Monarchy. Grbić utilises bibliographic data from Serbian printed books to highlight how translations and adaptations of educational materials helped spread ideas from many cultural hubs, including Russian, Greek, Venetian, Habsburg, and Protestant centres. Her research demonstrates that the multilingual and multicultural exchange within the Metropolitanate of Karlovci not only reflected but also expedited Enlightenment-era reforms in Serbian education and culture. Goran Vasin examines how the Enlightenment and absolutist-state concepts influenced the Serbian populace in the Habsburg Empire, and how these ideas, imparted through Habsburg Serbs, helped to Europeanise and modernise the Principality of Serbia. The contribution, with its timeframe from the late 18th to the early 19th century, emphasises the role of Serbian intellectuals such as Sava Tekelija and focuses on the establishment of newspapers, reading rooms, gymnasia, and cultural and educational societies as key conduits of intellectual and social transformation connecting Central Europe and the nascent modern Serbia.

The second chapter, *Between Imagination and Reality: Serbia and the Balkans between Europeanness and Balkanization*, discusses how the Balkans have been imagined, misrepresented, and reclaimed in European discourse.

In "Ruritania: Reflections on an Aftermath", Vesna Goldsworthy revisits her seminal concept of Ruritania, analysing the endurance of the Balkanist imaginary long after Yugoslavia's disintegration. The author contends that this narrative, which has persisted since the early 20th century, stems from unequal power dynamics in cultural representation rather than ignorance. Drawing on film history, Goldsworthy observes that over half of all cinematic portrayals of the Balkans made in the early 20th century were American, creating a distorted image that persists in modern media, including digital and AI-generated visual culture. By tracing the origins of these prejudices from British literature to contemporary global media, she traces how the Balkans were "invented" as Europe's internal Other, revealing more about Western identity-making than the region itself.

Misha Glenny's "The Balkans and Europe" reinforce this assessment from a political journalist and war correspondent's viewpoint. Glenny questions the historical and rhetorical construction of the Balkans as "the powder keg of Europe", which reduced a complicated region to a symbol of instability. The author investigates the geopolitical roots of this cliché, associating it with centuries of imperial struggle, and deconstructs the misuse of the term "Balkanisation", a term originally coined to describe the effects of the breakup of East Prussia. Moving beyond external impressions, Glenny stresses that Balkan élites have traditionally wielded sufficient political power to influence regional developments. The comparison between Transylvania's resolution of tensions in the late 1980s and Yugoslavia's descent into state-sanctioned violence in the 1990s demonstrates that the region's fate cannot be explained by stereotypes of inherent instability, but rather by political choices and historical circumstances.

Siniša Malešević's "Wars, States, and Nationalisms: From Western Europe to the Balkans" offers a sociological perspective on state formation and nationalism in the Balkans within the broader European context. He emphasises the interdependence of conflict, nation-building, and cultural interchange, focusing on how their connections to Western Europe shaped the organisation and ideology of newly formed Balkan states. The study contends that while conflicts accelerated state formation and entrenched nationalist sentiments, they also resulted in significant social inequality, as evidenced by dysfunctional civil institutions, authoritarianism, and insufficient cross-class solidarity. By situating Balkan nationalism within the broader European context, Malešević challenges the notion of Balkan exceptionalism, suggesting that the region's turbulent history stems from structural causes rather than inherent volatility.

Gordana Đerić's contribution, "Balkan Studies and the Stereotype Phenomenon after 1989", analyses how post-Cold War academic and cultural discourses repurposed old clichés with new theoretical titles. The first section examines the historical genesis of Balkan stereotypes—including the concepts of Balkanisation and Balkanism—across several fields, emphasising how these notions emerged as echoes of broader European concerns. The second section critically examines

post-1989 scholarship, emphasising the persistence of conceptual issues and the paradoxical role of stereotypes as both obstacles and tools that facilitate understanding. Rather than dismissing stereotypes as false representations, the author advocates for their contextualisation and historicisation, arguing that only by investigating their social and intellectual functions can we fully understand how the Balkans have been imagined, othered, and theorised within European thought.

The third chapter, titled *Europeanisation(s) of Serbian and South-East European Culture*, focuses on culture as the main medium of Europeanisation. In "Modernisation and Europeanisation(s) of South-East Europe seen through Cultural Transfer Europe-The Balkans, 1800–1914", Markovich synthesises the project's historical findings to demonstrate that modernisation in the Balkans was neither derivative nor linear. He examines the intricate processes of Europeanisation and modernisation in the Christian Balkan states during and after the Age of Revolution, focusing on structural and cultural barriers, such as widespread illiteracy, economic underdevelopment, and patriarchal social systems. He focuses on the interactions between foreign agents of influence (Philhellenes, German Romantics, American Protestants) and local reformers, arguing that Europeanisation was a multidimensional process mediated by cultural spheres—the Francosphere, Germanosphere, and Anglosphere. Markovich traces changing Western perceptions of the Balkans throughout the 19th century, demonstrating how external views directly influenced the pace and direction of local modernisation. He concludes with reflections on how cultural transfer functioned as a vehicle of both inclusion into and differentiation within Europe.

Zoran Milutinović's "Modernisation, Europeanisation and Aesthetic Modernity in the Balkans" examines how artistic modernism and philosophical aesthetics transcended borders, resulting in a distinctly Balkan blend of cosmopolitanism and local sensibility. Milutinović challenges the common conflation of the two concepts, arguing that modernisation—the genuine transformation of political, social, and economic structures—should be distinguished from Europeanisation, which often involved the superficial adoption of Western European cultural models. The author asserts that, in the Balkans, as in many other non-European contexts, Europeanisation essentially functioned as imitation rather than innovation, affecting ordinary life and elite culture without fundamentally transforming the existing societal structures. However, in the early 20th century, aesthetic modernism represented an important turning point: artists and intellectuals consciously rejected the concept of copying or emulating, arguing that modernity could take many localised forms. This transition not only altered the definition of modernity, but it also aestheticised national identity, transforming imitation into creative reinterpretation.

In "Serbian Travelogues and the West: Pastism as a Paradoxical Element of Interwar Travel Writing", Vladimir Gvozden examines interwar travel writing as a paradoxical expression of appreciation and criticism. He contextualises travel writing in the broader cultural landscape of the 1920s and 1930s, when increased mobility, new technology, and social transformation altered how authors experienced and represented the world. The author demonstrates how both well-known and

lesser-known Serbian writers employed the genre to express middle-class sensibilities and connect with European aesthetic, ideological, and political tendencies. Interwar travelogues combined documentary rigour with artistic imagination, reflecting optimism about cultural exchange while also expressing strong scepticism about modernity. As industrialisation and the capitalist rationale gained momentum, the genre shifted towards romanticised retrospection and "pastism", which idealised lost cultures, juxtaposing them with the fragmented modern reality. Finally, travel writing emerges as a reflection of interwar consciousness—an ambivalent area where alienation meets longing, and excursions outward into distant lands serve as spiritual and aesthetic quests for meaning in a rapidly changing Europe.

The fourth chapter, *Cultural Transfers: Europe-Serbia in the Nineteenth and Twentieth Centuries*, includes case studies that show how European ideals and practices were absorbed and modified in Serbia and Yugoslavia. Nemanja Radulović's "Serbian Folklore and European Framework. Some Remarks" explores the pivotal role of folklore in shaping Serbian cultural identity and its dynamic relationship with European intellectual trends. It traces the reciprocal contacts between Serbian and broader European cultures from the 18th to the 20th centuries, emphasising how folklore served as both a cultural import and export. Serbian intellectuals were influenced by Herderian thought, and they saw folklore as a repository of national spirit. At the same time, the European reception of Serbian folk poetry—particularly through German mediators like Jacob Grimm—played an important role in the rise of Pre-Romantic and Romantic sensibilities across Europe. Early Serbian folklore collections inspired other smaller European nations, while Western conceptual frameworks moulded Serbian perceptions of their own folk tradition. The study shows how folklore functioned as a multilateral network of cultural transfer, a dynamic interaction between Serbia and Europe that perpetually transformed both, ranging from Ossian-inspired Italian and French receptions to 20th-century comparative studies on the "Homeric question".

Ivana Pantelić's paper, titled "The Liberation of Women: International Influences and National Practices in 19th-Century Serbia and Yugoslavia", traces the evolution of women's battle for liberation from the late 1800s to the socialist period. It examines how Western European liberal ideas and Russian socialism influenced early Serbian feminists, as well as how succeeding generations—particularly socialist and liberal women's movements—established transnational networks and educational programs. Pantelić explores the interwar feminist landscape, the Soviet impact on pre-war communist women, and the rise of New Feminism in socialist Yugoslavia, which is rooted in Western second-wave feminism from the 1960s. The contribution offers a comprehensive account of the ideological and cultural shifts that shaped women's emancipation in the region during the last century.

Aleksandra Djurić-Milovanović, Jovica Pavlović, Srboljub Peović, and Nikola Tucakov's research, "Religious Minorities as Important Agents of Cultural Transfer During the Interwar Period: The Case of the Kingdom of Yugoslavia", analyses the role of religious minorities in the exchange of ideas, practices, and material culture across borders during the interwar period. Drawing on newly discovered

archival materials and firsthand historical sources, the authors employ historiography, ethnography, and discourse analysis within the context of cultural transfer theory. The study demonstrates that, prior to the rise of electronic mass media, minority religious communities had an important role in bringing foreign influence to Yugoslavia. Their cross-cultural encounters, however, frequently elicited distrust and antagonistic responses from state officials, revealing the contradiction between modernisation and control in the Kingdom's political landscape.

In "Representations of Heroes in the Serbian Modern Novel and European Cultural Transfer", Aleksandar Gajić discusses how shifts in the literary portrayal of heroes reflected broader social and cultural transformations shaped by European thought and aesthetics. He traces the development of the Serbian novel from its origins to Realism, the interwar period, and socialist Yugoslavia, demonstrating that European cultural transfer continues to inform Serbian literary paradigms. Gajić analyses the development arc of literary characters from epic, high-mimetic heroes to ordinary people and antiheroes, ending in postmodern narratives in which the hero—and often the whole concept of a primary protagonist—disappears entirely. He concludes that simplified heroic motifs survived only in genre fiction, remaining on the periphery of post-Yugoslav Serbian literature.

The final chapter, *Transformative Power of the EU: Serbia and the Balkans*, brings us to the 21st century. Sonja Licht's *Transformative Power of the EU and Serbia: From a Dream to Reality* is a personal and analytical look at the European Union's role in Serbia's post-2000 development. Licht investigates the recurring problems that undermine the European Union's transformative capacity in the Western Balkans, with a special focus on Serbia's trajectory. She notes both specific political setbacks—such as Serbia's delayed admittance to the Council of Europe during the premiership of Zoran Đinđić—and broader structural concerns, including tensions in neoliberal reforms and the stalled democratisation process. Finally, Licht argues that, despite stagnation and populist backlash, EU integration remains the most effective platform for supporting democratic and civic growth.

Ivan Vejvoda's contribution, "Transformative Power of the EU in Serbia and the Western Balkans", focuses on the regional level, analysing the successes and failures of the expansion process in the Western Balkans. Vejvoda discusses the slow and complex nature of Europeanisation, suggesting that the EU's transformative power takes time and internal social participation to take hold. While individuals typically demand rapid change, the author underlines that developing a democratic political culture is a generational process that takes decades rather than years. He situates Serbia's current political moment within broader European tendencies, highlighting that the crisis of democracy, as well as the rise of populism and right-wing forces within the EU, hinders the Union's potential to inspire revolution abroad. Nonetheless, the author maintains that meaningful reform cannot be forced from outside; it must arise from inside. In this regard, the student and civic protests in Serbia in 2024–2025 are seen as a decisive turning point in democratic awakening, reflecting a revived civic consciousness capable of revitalising Serbia's efforts towards genuine democratic integration. Vejvoda

underlines the significance of mutual responsibility: the Balkans must continue to develop, while the EU must restore its strategic commitment to the region.

In summary, *Serbia and the Balkans: Three Centuries of Embrace with Europe* effectively straddles historiography, cultural studies, and political analysis. It challenges Eurocentric narratives while acknowledging the Balkans as an integral part of European civilisation. The volume's timeframe, spanning from the Enlightenment to modern-day EU transitions, provides a chronological and thematic consistency rarely found in edited collections. The contributors take a critical approach to the core themes of cultural transfer and Europeanisation, presenting them as reciprocal interactions rather than one-way processes. The volume holds significant scholarly value: it redefines Europe's intellectual geography by arguing that the Balkans are Europe's mirror rather than its borderland or backwater. With its interdisciplinary scope and compelling synthesis of three centuries of cultural communication, the book represents a watershed moment in the study of contacts and interactions between Europe and the Balkans.

Stefan Berger and Philipp Müller, eds., *Dynamics of Emigration. Émigré Scholars and the Production of Historical Knowledge in the 20th Century*.
New York and Oxford: Berghahn, 2022, 268 p.

Reviewed by Petar S. Ćurčić*

Historical scholarship has not always been devoid of political overtones. The experience of forced migration has frequently exerted a profound influence on eminent historians and their scholarly contributions. A notable example of this phenomenon is Thucydides, who, having been expelled from Athens, embodies the intersection of historiography and political upheaval. Stefan Berger and Philipp Müller astutely observe that the 20th century was deeply marked by forced migration. Totalitarian regimes, particularly those in Italy, Germany, and the Soviet Union, engendered highly ambivalent attitudes towards intellectuals. Many scholars conformed to the ruling systems, continuing their research uninterrupted, while others had no choice but to emigrate—among them bourgeois historians from the USSR, as well as Jews, social democrats, and communists from Germany, Italy, and Spain. In response, Russian émigrés established several institutions, such as the Russian Free University in Prague, the Kondakov Seminar, the Russian Historical Archive Abroad, and the Russian Library (later renamed the Slavonic Library). A similar process unfolded for émigré scholars from communist states after 1945, leading to the formation of institutions such as the Polish Instytut Historyczny in Rome, Collegium Carolinum in Munich, the Ukrainian Research Institute at Harvard University, the Archives of Czechs and

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Slovaks Abroad in Chicago, the Bakhmeteff Archive of Russian and East European Culture at Columbia University, the Polish Institute and Sikorski Museum in London, the Museum of Russian Culture in San Francisco, and the Polish Institute of Arts and Sciences of America. Through these efforts, historians frequently assumed the role of cultural and scholarly intermediaries, particularly in the United States. The book *Dynamics of Emigration* encompasses an introduction, thirteen chapters, and a conclusion. These chapters explore the diverse experiences of historians who emigrated from Nazi Germany, the Soviet Union, Poland, Hungary, Yugoslavia, Spain, and Portugal.

In the first chapter, *A Private Perch: Cosmopolitanism, Nostalgia, and Commitment in the Émigré Historian's Persona*, Jo Tollebeek highlights many German historians who, having migrated to the United States and the United Kingdom, adapted to their new environments. Many of these scholars developed hybrid identities that reflected their new circumstances—illustrated by Peter Joachim Fröhlich's transformation into Peter Gay, and Georg Gerson Igersheimer adopting the name Georg G. Iggers. The complexity of identity is further exemplified by Wilma Iggers, Georg G. Iggers's wife, who came from a secularized Jewish family in Prague and spoke both German and Czech. The cosmopolitan context of their upbringing and subsequent European identity within the American milieu shaped Iggers and Gay's perspectives. They critiqued nationalism and embraced the concept of diversity within unity as a fundamental principle. Additionally, historians such as Eric Hobsbawm, Iggers, and Gay exhibited a form of nostalgia, reflecting on their works about Weimar culture, the German Enlightenment and historicism, and their personal experiences growing up in Germany.

In the chapter titled *The Émigré Historian: A Scholarly Persona?*, Herman Paul delves into the complex and nuanced aspects of intellectuals in exile. A central theme in Paul's analysis is the concept of hybridity and the liminality experienced by historians who navigated between their German origins and the American context into which they relocated. The notion of "Scholarly Personae" encompasses the professional self-conceptions, formative practices, daily routines, embodied methodologies, and exemplary figures that define their scholarly identities. Paul illustrates how the American academic environment fundamentally altered the methods and practices of these émigré historians. Confronted with diverse groups of émigré students and the need to adapt to the American educational system, these scholars experienced a profound transformation of their pedagogical and research approaches. The impact of this new context varied among German intellectuals; some acclimated to their new surroundings, while others, such as Hans Rothfels, longed to return to their homeland. The transatlantic perspective enabled many émigré historians to reassess and often reject the perspectives of their German mentors.

In *The Long Arm of the Dictator: Cross-Border Persecution of Exiled Historians*, Antoon De Baets addresses the challenges faced by contemporary historians amid the erosion of democratic institutions. The struggle for intellectual freedom manifested in various forms, including movement restrictions, censorship, preventing prominent intellectuals from communicating with family, and

diplomatic pressure to block the publication of historical writings. These issues were prevalent in totalitarian and authoritarian regimes such as Nazi Germany, Fascist Italy, Imperial Japan, Iran, Communist China, Francoist Spain, the Dominican Republic under Rafael Leónidas Trujillo, Romania under Nicolae Ceaușescu's regime, Sri Lanka during the armed conflict (1983–2009), and Taiwan under Chiang Ching-kuo. Historians in exile employed two principal strategies. The first, termed "Survival Strategies," involved adapting to new environments while continuing to pursue their scholarship and activism. The second, known as "Destruction Strategies," entailed abandoning the profession, destroying personal documents, and, in some tragic cases, suicide.

Joseph Malherek's contribution, *Nativism and the Specter of Antisemitism in the Placement of German Refugee Scholars, 1933–1945*, explores the impact of anti-Semitic legislation on the relocation of German scholars. According to data from 1935, approximately 650 scientists left Germany, a trend that persisted following the Anschluss of 1938. International organizations and foundations, including the Institute of International Education (IIE), the Carnegie Endowment for International Peace, the International Student Service (ISS), the Rockefeller Foundation, and the Notgemeinschaft Deutscher Wissenschaftler im Ausland, played pivotal roles in facilitating these scholars' resettlement. The University of Istanbul emerged as a significant hub for German scientists, and Max Horkheimer's Institute for Social Research found a new home at Columbia University. In addition to the United States, the United Kingdom played a part in this effort, primarily by making it easier for scholars to move to British universities and institutions throughout the British Empire.

Iryna Mykhailova's chapter, *Defending Objectivity: Paul Oskar Kristeller and the Controversy over Historical Knowledge in the United States*, explores the influence of the émigré experience on Kristeller's intellectual path. Mykhailova shows how Kristeller's migration led him to reject both pragmatism and analytical philosophy within the field of historiography. Kristeller opposed conflating historical methodology with scientific methods, rejecting the notion that history could be governed by general laws akin to those of the social sciences. He aimed to position historians as seekers of truth rather than mere reporters swayed by contemporary events. This perspective placed him at odds with Carl Hempel, another German émigré and proponent of logical positivism, who argued that history could be understood through predictive general laws as part of a unified framework.

Philipp Stelzel's chapter, *Émigré Historians and the Postwar Transatlantic Dialogue*, begins with the case of Hans Rothfels, who transitioned from being an émigré to a remigré. The return of scholars such as Hans Rosenberg and Dietrich Gerhard to Germany brought fresh perspectives to German historical scholarship, heavily influencing the post-war academic landscape. Emigré historians played a crucial role in shaping German studies, with notable figures such as Hajo Holborn, who taught at Yale and supervised over fifty dissertations, and Felix Gilbert, who served as a pivotal link between German and American historiography. Despite these contributions, friction persisted between the German academic community and émigré scholars. Stelzel highlights those disputes, such as Gerhard

Ritter's commendation of Rothfels' *The German Opposition to Hitler*, while vehemently criticizing Helmuth Plessner's *Verspätete Nation* as mere émigré imagination. Additionally, differences emerged regarding the works of Fritz Stern and George Mosse on the intellectual roots of Nazism, with West German historians often critiquing émigré scholars for what they saw as their inadequate understanding of the German perspective.

In *Between Integration and Institutional Self-Organization: Polish Émigré Scholarship in the United States, 1939–1989*, Kai Johann Willms outlines the organization and evolution of the Polish émigré community. Following the Polish government's relocation to London and the United States, the Polish Institute of Arts and Sciences in America (PIASA) was established in 1942. Willms details the political divisions within the émigré community, notably between the conservative and liberal factions. Historians such as Oskar Halecki and Felix Gross played pivotal roles in promoting Polish studies in the United States. Halecki notably challenged the concept of East Central Europe, advocating for its distinction from Russia and alignment with the West. Conversely, Zbigniew Brzeziński, representing the second generation of Polish émigrés, faced skepticism from the Polish community due to his perceived overintegration, which led some to question his attachment to Polish identity.

Judith Szapor's chapter *The Unlikely Careers of Laura Polanyi (1882–1959) as a Historian: The Intersections of Exile, Gender, Class, and Age* examines the prominent role of Laura Polanyi, a Hungarian historian who emigrated to America. Polanyi, a member of the assimilated Jewish middle class, was notable not only as Hungary's first woman historian but also as a prominent advocate for women's rights in Hungary and Austria. Her work had both European and emancipatory dimensions, reflecting her broader impact on the historiographical and feminist movements of her time.

Erős Vilmos, in his contribution *From Geistesgeschichte to Public History: The Years of Emigration of the Hungarian Historian Béla Iványi-Grünwald, Jr.*, offers a comprehensive exploration of the life and scholarly contributions of this eminent Hungarian historian. Vilmos identifies the phases in past Hungarian political emigration, identifying three distinct waves: the first in 1848/49, the second between the World Wars, and the third immediately following World War II, spanning 1945 to 1948. Notably, the postwar wave included both extreme right-wing intellectuals and anti-fascist figures. Béla Iványi-Grünwald, Jr. emerged as a particularly prominent figure in this context. In his early academic career, Iványi-Grünwald focused on the history of ideas, and as an émigré, he produced influential works examining the relationship between the state and the church in Eastern European countries and the early stages of the Potsdam Agreement, delivering lectures on the BBC on Hungarian and British intellectuals and politicians. For Iványi-Grünwald, public history represented a counter-narrative to the Marxist concept of class struggle and the Turanist interpretation of Hungarian history (insisting on the Asian origin of the Hungarians), reflecting his broader intellectual and ideological struggles.

Branimir Janković's chapter *Building New Networks: Russian Émigré Scholars in Yugoslavia* explains the transformative impact of Russian émigré scholars on the

Yugoslav intellectual landscape. Janković highlights how these émigrés introduced innovative research methodologies and new disciplines to Yugoslavia, with the most prominent among these scholars being Alexander Soloviev (1890–1971), Aleksije Jelačić (1892–1941), Vladimir Moshin (1894–1987), and George Ostrogorsky (1902–1976). Their work proved particularly impactful in Slavic and Byzantine studies. The Yugoslav regime, recognizing the potential of these intellectuals, sought to relocate émigré institutions to Yugoslavia as early as 1938. Janković notes a distinction within this group: Aleksije Jelačić was not only engaged in contemporary Russian and European history but was also aligned with the Marxist ideas of Georgi Plekhanov. The émigré scholars significantly advanced auxiliary historical sciences such as paleography, diplomatics, economic history, and social history. Russian emigrants played an important role in founding numerous research institutions. Notably, Ostrogorsky later headed the Byzantine Institute in Belgrade, while Moshin became Director of the Archive of the Yugoslav Academy of Sciences and Arts in Zagreb. Soloviev served as Dean of the Faculty of Law in Sarajevo, although his tenure ended prematurely due to the Tito-Stalin split. Moshin's contributions included the publication of Macedonian historical sources, which played a crucial role in the development of Macedonian identity in the postwar era.

Michael Antolović's *Networking in Santa Barbara: Writing History. Dimitrije Đorđević and the Comparative History of Balkan Nations* delves into the career of the distinguished Serbian historian Dimitrije Đorđević. Đorđević, a member of the Serbian bourgeois elite and a royalist, faced persecution under both Nazi and communist regimes. Despite his extensive education and scholarly acumen, the communist authorities deemed him a reactionary unsuited for the new political order. In the challenging environment of Belgrade, Đorđević was among the scholars who cultivated international connections, particularly with Greece. His research on Balkan national revolutions exemplified his comparative approach. Following his emigration, Đorđević continued his scholarly work at the Institute for Balkan Studies, reestablished in Belgrade in 1969. Antolović notes that during the 1960s, the United States invested heavily in transatlantic academic exchange by fostering higher education and inviting intellectuals from the Eastern Bloc, including Hungarian historians Andreas Alföldi, Béla Király, and István Deák (post-1956 Revolution), Polish historian Jan T. Gross (1969), as well as Russian historians Alexander Nekrich (1976) and Alexander Kazhdan (1979), and Serbian Byzantinist Bariša Krekić. During his time in emigration, Đorđević also authored articles on notable figures such as Slobodan Jovanović, Stojan Novaković, Radomir Putnik, and Vuk Karadžić. Antolović concludes that Đorđević played a pivotal role in bridging academic communities across the Atlantic.

In the essay *António Sérgio and José Ortega y Gasset: History, Theory, and Experiences of Exile*, Sérgio Campos Matos offers a nuanced examination of the historiographical contributions of these two prominent intellectuals, both born in 1883—Sérgio in Portugal and Ortega y Gasset in Spain. Coming from similar socio-intellectual backgrounds characterized by rationalism and neo-Kantian thought, both embarked on their

intellectual journeys in the 1920s and 1930s. Despite their shared origins, their paths diverged dramatically upon their emigration. Sérgio espoused a vision of human progress and perfection, advocating for Portugal's cosmopolitan and universalist mission. Conversely, Ortega y Gasset critiqued abstract intellectualism and rationalism, emphasizing the primacy of historical context in shaping human understanding. Campos Matos further elucidates the existential challenges they encountered in exile, particularly their financial hardships.

Christophe Araujo's chapter, *Émigré Portuguese Historians in France, 1945–1974: New Methods of Thinking and Writing Portuguese History*, explores the organization and intellectual contributions of Portuguese historians who opposed the authoritarian regime in their homeland and relocated to France after 1945. Araujo underscores the prominent roles of António José Saraiva (1917–1993), Vitorino Magalhães Godinho (1919–2011), and Joaquim Barradas de Carvalho (1920–1980). In France, these émigré historians were notably influenced by the Annales School. Godinho's research into Portuguese economic history and colonial expansion, in particular, was profoundly shaped by the works of Lucien Febvre and Marc Bloch. His scholarly exchanges with Fernand Braudel and Pierre Chaunu further enriched his perspectives. Barradas de Carvalho also engaged with Braudel, reflecting the deep impact of the Annales School on their historiographical methodologies.

Finally, in the *Conclusion: New Perspectives on Émigré Scholarship and What Remains to be Done*, Stefan Berger and Philipp Müller address the intricate interplay between scholarly and political personae. They argue that scholarly identities cannot be disentangled from political contexts and emphasize the pivotal role of international organizations in facilitating the relocation and professional integration of émigré historians. This comprehensive summary of the *Dynamics of Emigration: Émigré Scholars and the Production of Historical Knowledge in the 20th Century* underscores its significance not only for 20th-century historiography but also for the broader research of transnational and global history. This volume offers a seminal contribution to understanding the multifaceted experiences and impacts of émigré scholars within historical scholarship.

A. Djurić Milovanović, J. Kolundžija, M. Măran, O. Hedeșan and C. D'Anca, eds.,
New Cultural and Political Perspectives on Serbian-Romanian Relations.
New York: Peter Lang, 2024, 380 p.

Reviewed by Marija Milinković*

In early 2024, the reputable publisher Peter Lang, in collaboration with the Balkan History Association (BHA), released an international edited volume titled *New Cultural and Political Perspectives on Serbian-Romanian Relations,* as part of the South-East European History series. As the first of its kind in English, the volume aims to provide an overview of the political and cultural interactions between Serbs and Romanians for an English-speaking audience. The edited volume includes contributions by researchers in history, anthropology, philology, ethnology, and art history, and explores the interconnectedness of Serbs and Romanians during the 18th, 19th, and 20th centuries through the perspectives of diplomacy, history and culture. The volume comprises into two parts.

The first part features eight studies by Serbian and Romanian historians on historical and diplomatic relations, based on a diverse body of literature and archival material. The first paper in this section, written by Romanian historians Miodrag Milin and Victor Neumann (pp. 19–42), discusses the political involvement of prominent individuals in Banat and Transylvania in the second half of the 19th century, as well as the concept of nationality among Romanians in the Austro-Hungarian Empire. Ivana Spasović's contribution (pp. 43–64) explores the relationship between Serbs and Romanians in the Banat Military Frontier in the late 1860s and early 1870s. The paper also highlights the main challenges experienced by the Serbs and Romanians living in the Banat Military Frontier.

The first part also includes studies on notable figures who made an impact on the history of Serbian-Romanian relations. *Romanian-Serbian Relations Reflected in Vasile Popeangă's Works: Historiographical Insight,* by Felicia Aneta Oarcea (pp. 65–80), explores the cultural exchanges between Serbs and Romanians and the role of Vasile Popeangă (1920–2012), one of the most prominent figures in the Romanian educational system, in these exchanges. Srđan Mićić's contribution (pp. 81–123) focuses on diplomatic relations, specifically the influence of the first Yugoslav plenipotentiary minister in Bucharest, Boško Čolak Antić, on the policies of the Kingdom of Serbs, Croats, and Slovenians/Yugoslavia towards Romania. Anđelija Miladinović examines the dynastic relationship between the Serbian and Romanian royal houses and the figure of Maria Karađorđević, the Romanian princess and Yugoslav queen consort (pp. 125–146). Dragan Bakić (pp. 147–171) focuses on the role of Jovan Dučić, a prominent writer, poet and diplomat, during his tenure as the Yugoslav ambassador in Bucharest from 1937 to 1940. Vladimir Lj. Cvetković and Nemanja Mitrović focus on the post-World War II period.

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Cvetković explores Josip Broz Tito's dealings with the Romanian Prime Minister Petru Groza between 1945 and 1947 (pp. 173–197), and Mitrović analyzed the relationship between Josip Broz Tito and Nicolae Ceaușescu and its impact on Yugoslav-Romanian relations in the late 1960s and early 1970s (pp. 199–224).

The second part of the volume brings interesting insights into the relations between Serbs and Romanians in art, religion and literature. This section comprises six studies, including three focusing on the artistic aspect of cultural transfer between the two nations. The section also discusses prominent figures in the fields of culture and religion, as well as literary connections between Serbs and Romanians.

The first contribution, authored by art historian Raluca Prelipceanu (pp. 227–255), delves into the influence of Serbian painters on Transylvanian art during the 18th and early 19th centuries, as well as the involvement of Transylvanian painters in Banat. *Stefan Tenecki: The Baroque Painter of Serbs and Romanians* by Jovana Kolundžija (pp. 257–274) provides insight into Tenecki's influence in adapting the Byzantine tradition to the Baroque style, as well as his legacy for the art and culture of the Serbs and Romanians in the Habsburg Monarchy. Maria Alexandra Pantea and Virginia Popović's paper (pp. 275–292) zooms in on Serbian intellectuals in Arad and their impact on education, science, and culture from the 17th to the 19th centuries. The authors specifically highlight the prominent Tekelija family, focusing on the political career of Sava Tekelija, the first Serbian Doctor of Law and a philanthropist.

Vladimir Dimitrijević and Serbian-Romanian Church Relations in the Late Nineteenth and Early Twentieth Centuries by Mircea Măran and Aleksandra Djurić Milovanović (pp. 293–304) explores the prominent role of the theologian Vladimir Dimitrijević (1868–1928) in strengthening Serbian-Romanian church relations and halting the spread of the Nazarene movement among Orthodox Serbs and Romanians. *Romanian-Serbian Literary Relations at the Beginning of the Millennium* by Octavia Nedelcu and Gordana Nicoleta Peici (pp. 305–333) delves into the remarkable role of translation in the transfer of cultural values. The authors focus on the translation of works by renowned Serbian writers such as Milorad Pavić, Miloš Crnjanski, Danilo Kiš, and Ivo Andrić from Serbian to Romanian, as well as the reception of Serbian literature in Romania. Finally, yet no less importantly, in her case study *In Between Local Identity and National Artistic Heritage: Naïve Painting from Uzdin* (pp. 335–357), Diana Mihuț examines the origins of naive painting in this village in Serbian inhabited by Romanians, by sharing various personal stories. In addition, Diana Mihuț highlights the significance of naive painting in preserving the artistic heritage of Romanians in Banat and delves into the characteristics of this cultural phenomenon.

This volume focuses on the interactions between Serbs and Romanians. However, it is important to note that these relations are not presented in isolation. The contributions offer a comprehensive view of the cultural and political relations of the two nations within the context of Southeastern Europe. The wide range of topics covered in the book allows us to see how the connections between Serbs and Romanians influenced each other in the past. Covering subjects ranging from

politics and diplomacy to culture and religion, this volume offers an interdisciplinary perspective on Serbian-Romanian relations.

In the introduction, the editors state that the volume aims to add to our understanding of the mutual influences, exchanges, and transfers of knowledge and ideas that significantly impacted Serbian-Romanian political and cultural history in modern times (p. 9). Jovan Dučić is an illustrative example of the intersection of diplomacy and literature. During his time as an ambassador in Bucharest, he had the opportunity to connect with prominent Romanian writers, who translated his poetry and prose into Romanian.

The edited volume *New Cultural and Political Perspectives on Serbian-Romanian Relations* presents significant research findings that can be valuable for researchers exploring the relations between Serbs and Romanians. It is worth noting that the research relied on extensive archival material and existing literature, which can also be beneficial for those interested in these topics. In addition to the undeniable merit of this volume, and given the complexity of the longstanding ties between Serbs and Romanians, its significance also lies in the potential to pave the way for new research on Serbian-Romanian relations.

Kosta Nikolić, *Bosna i Hercegovina, rat koji su mnogi želeli: 1992–1995. Knj. 1. U ime smrti (1992)*

[Bosnia and Herzegovina, the War that Many Wanted: 1992–1995. Vol.1. In the Name of Death (1992)]. Novi Sad: Akademska knjiga, 2024, 750 p.

Reviewed by Dragoljub Mandić*

The civil war in Bosnia and Herzegovina, as well as other events related to the breakup of Yugoslavia, have long remained largely outside the focus of Serbian historiography. Politicisation, the passage of time, and a lack of sources were the main reasons – often also used as excuses – why Serbian historians avoided this important topic. Finally, this gap has only recently begun to be addressed thanks to authors such as Kosta Nikolić, who first published the three-volume monograph *Jugoslavija, poslednji dani: 1989–1992*, followed by *Krajina: 1991–1995*, and, in 2024, the first of three planned volumes of the monograph *Bosna i Hercegovina, rat koji su mnogi želeli: 1992–1995*, published by Akademska knjiga.

The documents stored in the database of the International Criminal Tribunal for the former Yugoslavia form the heuristic foundation of this book. As stated in the preface, the author's commitment to the impartial collection of historical facts led him to choose a "traditional" method

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of presentation over the "constructivist" approach, which views the past as a "textual, narrative, and ideological 'creation' and thereby questions the epistemological power of science". As the author had already covered the main currents of Bosnia and Herzegovina's political history from the spring of 1991 up to its international recognition on 6 April 1992 in the third volume of *Jugoslavija, poslednji dani: 1989–1992*, this book does not contain an introduction recounting the events leading up to the outbreak of the brutal armed conflict. Instead, it opens with a description of combat operations in the spring of 1992, covering the entire territory of Bosnia and Herzegovina, from Semberija and Podrinje to Bosanska Krajina and western Herzegovina. The second chapter is dedicated to the period during which units of the Yugoslav People's Army (JNA) withdrew to Serbia and Montenegro, paralleled by the formation of the Army of the Republic of Srpska. This chapter also pays close attention to the events in Sarajevo, particularly the blockade of JNA barracks and the crime in Dobrovoljačka Street. The third part of the book opens with the crime that occurred in a similar fashion during the JNA's withdrawal from Tuzla. It also discusses the battles in the summer that led to the establishment of a corridor in Posavina – one of the most significant successes achieved by the Serb side during the entire war. Simultaneously, the book examines events in western municipalities such as Prijedor, Sanski Most, and Ključ, where fierce battles between Serb and Muslim forces were accompanied by crimes against prisoners and civilians. The author then returns to events in Sarajevo, which became divided, with Muslim forces controlling the city centre and the Serbian forces holding the outskirts and surrounding hills. As the central parts of the city came under blockade and the civilian population found itself in an extremely dire situation, the issue of demilitarising the Sarajevo airport was raised. However, its transition from Serbian military control to peacekeeping forces for the purpose of humanitarian aid was hindered by repeated ceasefire violations. After this, the author analyses the clashes between Serbian and Croatian forces in Herzegovina, with the epicentre in the Neretva valley.

The topics of paramilitary formations and war crimes have dedicated sections. The involvement of paramilitary groups on the Serb side is viewed from multiple angles: while they held some military value at the beginning of the war, when combat operations resembled a kind of guerrilla warfare, their looting and crimes against prisoners and civilians contributed to the chaotic situation in the Republic of Srpska. Their removal from Bosnia and Herzegovina became one of the top priorities of the Serbian military leadership, and the author presents extensive data on this issue. Unlike the wars in Slovenia and Croatia, Bosnia and Herzegovina saw large-scale killing of civilians from the very beginning. Since this volume focuses mostly on the Serbian side, the author devotes significant attention to the perpetrators of those crimes in its name against members of the other two warring parties. His analysis of war crimes is conducted municipality by municipality, with the most extensive coverage given to crimes committed in Višegrad and the surrounding area by the paramilitary group led by Milan Lukić. On the other side, the author also examines camps for Serbs, including the most notorious among them, Dretelj near Čapljina and Čelebići near Konjic.

The next part of the book focuses on the attitude of the Federal Republic of Yugoslavia toward the war in Bosnia and Herzegovina. Although the conflict was not formally at war, the FRY found itself in a highly complex situation as it came under international isolation from 30 May 1992. This prompted numerous peace initiatives from Belgrade, which did not exclude aid sent to the Serbs in Bosnia and Herzegovina. After sections on the military operations conducted in the second half of 1992 in Posavina and around the town of Jajce, the author once again returns to Sarajevo, covering events up to the beginning of summer 1993, followed by the final part of the book. This section covers the beginnings of the war in Srebrenica and neighboring municipalities, serving as an introduction to the controversial events of the summer of 1995.

At the time of the events described in this book, Kosta Nikolić was among the first authors whose objective perspective on World War II contributed to the progress of Serbian historiography. Thirty years later, Nikolić once again takes on that role, thanks to his work on the dissolution of socialist Yugoslavia. While a comprehensive assessment of his monograph on the war in Bosnia and Herzegovina will have to wait for the remaining two volumes, it can already be concluded that this work provides a vast number of facts about the armed conflict. Through thorough research of the extensive documentation housed in The Hague, as well as digital archives of US President Bill Clinton and German Chancellor Helmut Kohl, Nikolić has not only significantly illuminated these events but also has provided a valuable guidepost for those intending to pursue similar research.

Paul H. Stahl, *Structures sociales en Europe du Sud-Est*
[Social Structures in South-Eastern Europe]
Edited by Irina Stahl, Stelu Șerban and Andrei Timotin (Collection of the Institute for South-East European Studies of the Romanian Academy).
Brăila: Editura Istros a Muzeului Brăilei Carol I, 2024, 463 p.

Reviewed by Annemarie Sorescu-Marinković*

Paul Henri Stahl (1925–2008) is a well-known Romanian ethnosociologist who made crucial contributions to the comparative sociological research of the South-Eastern European area. His studies of premodern forms of property, organization of social groups, religion and sacrifice represent important landmarks in this field, remaining points of reference to this day. Paul H. Stahl was a continuator of the tradition of Romanian interwar sociology, which presented obvious avant-garde characteristics in European social sciences, especially through its interdisciplinary dimension.

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Paul H. Stahl graduated in 1948 from the Faculty of Philosophy in Bucharest, obtaining his bachelor's degree in sociology the very year when the Romanian communist authorities banned sociology as a science. After working under extreme conditions in several research institutions in Romania, in 1969, Paul H. Stahl chose to continue his career in France. From 1969, he taught at the École des Hautes Études en Sciences Sociales in Paris and, from 1970, at the University of Paris–Descartes, when he also became a member of the Laboratory of Social Anthropology, then headed by Claude Lévi-Strauss. After the fall of communism in Romania, he was elected an honorary member of the Romanian Academy (1993) and served as the director of the Institute of South-Eastern European Studies from 1999 to 2007.

The opus of Paul H. Stahl is vast, original and innovative, straddling several disciplines – sociology, ethnology, history – which, from the 1930s on, have been in the process of juxtaposing and synchronizing their methods and results to give birth to new academic disciplines whose names and boundaries have varied in the second half of the 20th century: historical sociology or social anthropology. Unfortunately, a large part of this extremely rich and diverse body of work remains scattered across collective volumes and periodicals, including the two journals that Paul H. Stahl edited in Paris: *Études et documents balkaniques et méditerranéens* (32 volumes, 1979–2009) and *Sociétés européennes* (38 volumes, 1986–2008), the latter including the series *Études roumaines et aroumaines* (10 volumes, 1990–2006).

The present collection of studies, edited by Irina Stahl, Stelu Șerban and Andrei Timotin, *Structures sociales en Europe du Sud-Est* ("Social structures in South-Eastern Europe"), is meant to bring together several of his most important papers in one book. The volume is the result of a careful selection guided by the general topic of the structures that organize the life of traditional societies in South-Eastern Europe. The 22 selected texts are grouped around several interdependent sub-themes, in five main sections: *Pays de montagne, pays de vallée* ("Land of the mountains, land of the valley"), *Communautés villageoises* ("Village communities"), *Maisons et églises* ("Houses and churches"), *Parenté biologique, parenté symbolique* ("Biological kinship, symbolic kinship"), *Noms personnels, noms fictifs* ("Personal names, fictional names"). With the exception of one text in English, all others are in French. The articles reproduced in this volume required a number of editorial changes to align them with the standards of the series. The bibliographic reference system, in particular, was modified: the abbreviated references in the body of the text (author and year of publication) were replaced by footnotes with full references (author, title, place and date of publication, pagination) taken from the final bibliographies of the articles. These references were supplemented or corrected where necessary.

The volume opens with a programmatic text, *L'Europe du Sud-Est. Aires culturelles et facteurs structurants (XIXe et XXe siècles)* ("South-Eastern Europe. Cultural areas and structuring factors (19th and 20th centuries)"), which highlights the cultural character and unity of the South-Eastern European space, based on a common history and social life under the empires that succeeded one another (Roman, Byzantine, Ottoman, Austrian). The text analyzes the factors that structure the

unity and continuity of traditional social structures, as revealed in research carried out in the 19th and 20th centuries: kinship, extended domestic groups, with their corresponding types of houses, community property, and the institution of "old men".

The first section of the volume, *Pays de montagne, pays de vallée*, examines different forms of political organization and pre-state social formations in Romania, Albania, Montenegro and other European regions, emphasizing the conservative character of the rural communities of the Balkan Peninsula, which perpetuated archaic social structures until the beginning of the 20th century. The form of political organization of these communities was based on the presence of "old men", who are at the same time judges, witnesses and administrators, while the fundamental social units are the village and the household.

The second section, *Communautés villageoises*, through the five texts it comprises, sheds light on the historical evolution of village communities in South-Eastern Europe, the rules governing life in ancient European village communities and the magical organization of the Romanian village territory. The last text in this section focuses on three villages of *Rudari* from Romania.

The third section of the volume, *Maisons et églises*, sheds light on the relationships between the constructed framework (house, church, village) and the social group. The articles in this section study the beliefs and rites associated with the organization of the territory and habitat, the forest and water sources, the construction of the house and the church, and the organization of the cemetery. The importance of perennial trees – the fir in Romania, the cypress in Greece – is particularly emphasized.

Parenté biologique, parenté symbolique, the fourth section, is devoted to biological and symbolic forms of kinship in relation to the notion of *consanguinity*, which is particularly rewarding from a social point of view. Paul H. Stahl explores the notion of *blood*, which is present in most areas of social life, zooming in on its impact on the organization and transmission of property and on how a real biological element takes on a fictional character over time to resolve specific legal problems.

Finally, the last part of the volume, *Noms personnels, noms fictifs*, is devoted to the social dimension of the name – the names of princes and peasants – and to the symbolic and religious reasons underlying the choice or change of name, in the wider Balkan area.

The present volume is an important landmark in salvaging the work of the Romanian ethnosociologist and its inclusion in the scientific circuit. It has the merit to restore, in a coherent and significant whole, part of the research devoted by Paul H. Stahl to the traditional societies of South-Eastern Europe. This collection of studies transcends boundaries between disciplines and will be of interest to anthropologists, ethnologists, sociologists, historians and philologists interested in the life of South-Eastern European societies of the past.

Aleksandra Djurić Milovanović, *The Untold Story of the Nazarene Emigration from Yugoslavia to North America*.
Lanham, MD, USA: Lexington Books, 2024, 131 p.

Reviewed by Joseph Pfeiffer*

In her new book, Dr. Aleksandra Djurić Milovanović tells the heretofore *untold* story of the Nazarene emigration from Yugoslavia to North America. The word *untold* is indeed quite fitting to describe the recent contribution of Serbian scholars to the history of the Nazarenes over the last two decades.

The first two chapters of the book orient readers to the historical origins and emergence of the Nazarene movement in its 19th-century European context. Chapter 1 succinctly narrates the emergence of this new radical, renewalist, Neo-Protestant and specifically Neo-Anabaptist movement in Switzerland and the German-speaking world under the charismatic leadership of its founder, preacher Samuel Heinrich Frohlich. Chapter 2 examines the appeal of the movement as it spread into the multicultural and multi-lingual context of the Austro-Hungarian Empire.

In Chapters 3–6, the author brings the reader to her own particular focus on the subject of the reasons for, and the consequences of, the emigration of the majority of Nazarenes from their Eastern European homelands, especially to North America. The book highlights the themes of the dynamic tension between the strict non-conformity of the Nazarene community and social and political pressures they faced from the majority populations of their homelands, especially on the Nazarene convictions of non-violence, and their refusal to swear oaths and take up arms in military service, and the severe consequences the community faced for holding to their religious convictions. In Chapter 3, drawing from her own extensive ethnographic interviewing of North American Nazarene descendants of the "first wave" of immigrants to North America, the author reconstructs the story of Nazarene religious refugees who sought religious freedom in the first part of the 20th century, and their struggle to adapt and integrate into their new homeland. Chapter 4 details this continuing struggle, as well as new challenges the Nazarenes of Yugoslavia faced during the Communist regime, documenting, through both extensive archival research and first-hand accounts, the harrowing experiences of intense persecution and the rising desperation of Yugoslav Nazarenes to escape the increasing hostility they faced in their homeland. Chapter 5 continues this narrative to the other side of the Atlantic and describes in detail Nazarene efforts to rebuild their communities in North America, and to develop advocacy and support networks for their persecuted brethren remaining in Yugoslavia. Finally, in Chapter 6, the author brings the narrative to a conclusion by describing the transformative effects of the experiences of transnational migration of the Nazarene community, changing it into an outward-focused, global missionary movement, in contrast to the isolated and closed community that

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persisted among the remnant of Nazarenes that remained in Yugoslavia.

To situate Dr. Djurić Milovanović's contribution, I suggest that this book completes a three-part "series" by a new generation of Serbian scholars that tells the *untold* story of the Nazarenes.

Dr. Bojan Aleksov's (Aleksov 2006) contributions tell the untold story of the origins and emergence of the Apostolic/Nazarene people as a multi-cultural religious movement in 19th-century Eastern Europe, in the context of the multi-ethnic Austro-Hungarian Empire. The recent translation and publication of Dr. Branko Bjelajac's doctoral thesis (Bjelajac 2019), tell the untold story of the trials and tribulations during the 20th century under both the Kingdom and Socialist State of Yugoslavia. Finally, Dr. Djurić Milovanović's contributions bring the "untold story" to the present day, with an incisive ethnographic documentation of the analysis of the resolution to this quandary through mass migration to North America, as well as the subsequent effects on both Nazarene emigrants and the remnants that have remained in Serbia to the present day.

To say that this "Untold Story" has finally been told is indeed not to say that "stories"– and here I emphasize the plural against the singular–have not been told. Like many other descendants of the Nazarene immigrants, I heard numerous stories told by my family members related to life, faith, and struggles both in Yugoslavia before, during, and after World War II and in the new struggles of adapting to a new country, language, and culture in North America. Most of these stories were told orally, while some were written down, published, or recorded on audio and video for subsequent generations. What remained untold, however, was how these individual stories fit into a larger collective story that could be critically analyzed and understood within the broader global history that both shaped the Nazarene identity, as well as their own collective contributions to that wider history.

Through painstaking archival research, and ethnographic interviewing and analysis, Dr. Djurić Milovanović has made an important contribution to this gap. What she has done here is to collect the various stories and identify key themes that finally tell that collective story, in a manner that represents a whole greater than merely the sum of its parts.

To this end, Dr. Djurić Milovanović, as an apt ethnographer, provides a double service, both to the academic community and to Nazarene community and their descendants; for she is both telling the story of Nazarene migration to the wider world, as well as telling that larger story back to the many story tellers that have informed her work, and situating it within a broader historical, social, and ethnographic interpretive context. As I read Dr. Djurić Milovanović's work, I hear echoes of those same stories my grandmother used to tell me. I understand better the context of my own family history and how this has shaped my own identity as a third-generation descendant of Yugoslavian Nazarene immigrants. The eager and welcome reception of her work among the North American Apostolic Christian/Nazarene community that I have witnessed, as well as the scholarly and academic rigor that the author has painstakingly woven throughout the book, attests to the technical validity of her interdisciplinary ethnographic methodology.

This book's thorough documentation of first-hand accounts comes at a critical time for many of the immigrant generation, including some of Dr. Djurić Milovanović's own informants, who have already passed from the earth. It is at just such times that many of the descendants in subsequent generations, myself included, seek a coherent narrative for understanding this legacy for their own identity.

To this end, these Serbian scholars, especially Dr. Djurić Milovanović, have provided the foundations by which the untold story can be told to the world in coherent form and help to make visible what has largely been invisible. Moreover, these works provide an invaluable resource, a mirror of sorts, by which the continuing Nazarene faith communities and their descendants can continue to reflect on their own collective history and identity in relation to the wider world, past, present, and, perhaps, even future. The book raises important ongoing questions for both the Nazarenes and similar communities, especially the importance of understanding the ongoing effects of generational trauma on these communities and their descendants, even many years after the facts described, and the persistence of transnational communities even in the face of rising nationalism. As a unique study of a timeless phenomenon in the human experience, this book will have a long shelf-life as a valuable resource on the shelves of academic libraries for scholars of multiple disciplines, as well in the home libraries of Nazarene descendants, passed down as an heirloom for generations.

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Iemima Ploscariu, *Alternative Evangelicals: Challenging Nationalism in Interwar Romania's Multi-ethnic Borderlands*. Brill Schöningh, Paderborn, 2024, 221 pp.

Reviewed by Aleksandra Djurić Milovanović*

Iemima Ploscariu's monograph is a very well-researched and conceptually rich contribution to the social and religious history of interwar Romania. Drawing on archival sources from Romania, Moldova, Denmark, Sweden, and the United States, as well as a wide range of evangelical periodicals and police surveillance reports, the book reconstructs the multi-ethnic, multilingual, and socially diverse evangelical communities that emerged in Greater Romania after 1918. In doing so, it challenges dominant narratives that portray the interwar religious landscape as a binary opposition between the Romanian

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Orthodox Church (BOR) and the state, on the one hand, and national minorities on the other.

Rather than examining evangelicals through the usual communist-era label of "neo-Protestants," Ploscariu foregrounds their self-identification as evangelicals, a term consistently used in their own publications from the 1920s and 1930s. She argues that these communities provided an "alternative" social model precisely because they defied the state-sponsored project of homogenization, cultivating religious identities that transcended ethnicity, language, and class. evangelicals formed what contemporary Siguranța agents described as *lumi împestrițate* or "dappled worlds", as their ethnically diverse communities included Romanians, Russians, Germans, Jews, Greeks, Roma, and others.

The book consists of five chapters and the Epilogue. Chapter 1, *Mapping the Evangelicals: A Social History*, maps out the demographic and regional distribution of four evangelical groups: Baptists, Brethren, Pentecostals, and Seventh-day Adventists. These communities lived across the territories incorporated into Greater Romania after World War I. Ploscariu analyzes census data, legislation, and the complex legal categories (recognized denominations, religious associations, outlawed sects) through which the Romanian state sought to regulate religious life. Her analysis shows how these categories shifted repeatedly in response to political changes, foreign pressure, and the Orthodox Church's lobbying power.

Chapters 2 and 3 bring two case studies, which are the most original sections in the book. *Fighting Nationalism: The Jewish Christians of Chișinău* examines the Jewish Christian congregation in Chișinău, led by Lev Averbuch, a figure largely absent from Romanian historiography. Using police reports, missionary correspondence, and internal publications such as Farul Mântuirii, Ploscariu reconstructs a vibrant community that actively resisted both Romanian nationalist pressures and growing antisemitism. The chapter also explores the role of travel, transnational connections, and missionary networks (British, Danish, Swedish, and American) in shaping a specifically Bessarabian form of Jewish-Christian evangelical identity.

Chapter 3, *Crossing Social Divides: the Roma Baptists*, focuses on the Roma Baptists of Arad, tracing the emergence of the first Roma Baptist church, Credința, founded in 1932. Although the surviving sources are scarcer than for Chișinău, Ploscariu successfully demonstrates how Roma believers used evangelical structures to carve out autonomous spaces of religious, social, and cultural agency. These findings resonate with later studies on Roma Pentecostal revivals but serve as a crucial pre-history that has been largely overlooked in both Roma studies and Romanian religious historiography.

One of the book's most innovative chapters is Chapter 4, *Motley Repertoires and the Performative Power of Music*, which examines the role of music—choirs, orchestras, communal singing—as a central component of evangelical identity. Ploscariu convincingly argues that music served not only liturgical functions but also as a conduit for crucial political work: it legitimized the evangelical presence in public space, fostered internal cohesion across ethnic lines, and became a visible marker of their modern institutional culture (seminaries, printing houses, orphanages, clinics). Through this lens of "lived religion," the book demonstrates how everyday practices shaped the evangelical

sense of belonging and identity more profoundly than formal theology.

The Sectarian Bacteria: Social, Political, Religious Struggles is the title of the fifth chapter, which addresses the growing hostility toward evangelical groups from both state authorities and the Romanian Orthodox Church. Evangelicals were increasingly portrayed as sectarian bacteria threatening national unity—a language that echoed broader European discourses of purity and contamination in the 1930s. The book documents numerous cases of police surveillance, disruption of gatherings, deregistration of associations, and administrative persecution. The Epilogue, *Evangelicals and World War II*, explains how this hostility culminated in 1940, when all "sectarian groups" were declared illegal, and some believers—especially Jews and Roma—were deported to Transnistrian ghettos alongside other persecuted minorities.

Iemima Ploscariu's book fills an important gap in Romanian religious history, focusing on the religious landscape of interwar Romania and its minorities. Demonstrating the ethnic diversity of evangelical communities, which incorporated Jews, Roma, Germans, Russians, Hungarians, and Romanians, the book challenges the widespread notion that ethnicity and religion were closely interconnected and mutually dependent categories in this period. Thus, the monograph takes its rightful place among similar studies that underline the supranational identity of evangelical groups in the Balkans. It argues compellingly that conversion to evangelical groups created new forms of identity that did not align with state-sponsored nationalist policies. As Ploscariu notes, conversion did not result in assimilation; instead, it often meant increased marginalization and surveillance. Since the research focuses on borderlands and contested regions such as Bessarabia and Transylvania, the study contributes to the growing literature on national indifference, alternative loyalties, and multi-layered identities in East-Central Europe. The interesting data provided on Roma evangelicals could perhaps be supplemented with some comparative insights on Roma evangelicals in neighboring countries (Yugoslavia, Hungary, Bulgaria) to enhance regional contextualization. Iemima Ploscariu's monograph represents a valuable contribution to the existing body of scholarship. The book demonstrates that the evangelicals were not marginal "sectarians," as official narratives claimed, but rather dynamic, transnational, and pluralistic communities that offered an alternative vision of belonging at a moment when Romanian society was moving toward ethnic and ideological homogenization. Ploscariu's book is a must-read for historians of Romania, scholars of evangelicalism, and anyone interested in the interplay of religion, nationalism, and minority identities in East-Central Europe. It is a unique contribution to the study of minority religious groups in this part of the world.

Annemarie Sorescu-Marinković and Monica Huțanu, *The Vlachs of Eastern Serbia: Language and Society*.
Vienna: Austrian Academy of Sciences Press, 2023, 256 p.

Reviewed by Ela Cosma*

Published as volume 3 of the series "VLACH" (Vanishing Languages and Cultural Heritage), initiated by the eponymous commission headed by anthropologist Thede Kahl (Director of the Institute of South Slavic Studies at the Jena University) and approved by the Austrian Academy of Sciences Publication Committee, this book offers a dense and pioneering sociolinguistic contribution on the Romance-speaking inhabitants of Eastern Serbia in contemporary history (1940–2025).

Both authors have dedicated their lifetime studies and field research to the problems of the Serbian Aromanians, Megleno-Romanians and Banat Romanians living in the former Yugoslavian countries (especially in Serbia and Vojvodina). Following the paths paved by Paun Es Durlić and Biljana Sikimić, Annemarie Sorescu-Marinković has also tackled folklore and dialectology (as the author of *Românii din Timoc astăzi. Ființe mitologice*, Cluj-Napoca, 2012; co-author of *Românii de lângă noi*, Bucharest, 2013; co-editor of *The Romance-Speaking Balkans: Language and the Politics of Identity*, Brill, 2021; *Vulnerable and Endangered Languages in Europe*, Belgrade, 2025), while Monica Huțanu's interests included historical linguistics and Romanian phonetics and orthography (co-author of *Dicționar ortografic esențial*, Deva, 2008; co-editor of *Zakonik Cara Stefana Dušana, knj. V, Rumunski prevod Zakonika Cara Stefana Dušana i Epitimijnog Nomokanona 1776*, Belgrade, 2021).

The collective subject of the present volume is the generically (and officially) called *Vlachs*, described by the two authors as speakers of a Romanian variety they refer to as *Vlach Romanian*. As Annemarie Sorescu-Marinković and Monica Huțanu repeatedly show, the neutral term *variety* is used in this book to avoid (politically charged) terms like *language* or *dialect*. The same reason has led the authors to employ the double ethnonym *Vlach Romanians*, thus bringing together, on one hand, the Serbian exonym, Vlachs (*Vlasi*), living in Eastern Serbia and their own endonym, Romanians (*rumîń*, *rumâń*), who speak Vlach (*vlaški*) or Romanian (*rumunješće*), and, on the other hand, the Romanian phrase denominating the (same) Romanians of the Timok Valley (*românii din Timoc*), speaking a Romanian idiom with minor differences (especially in terms of vocabulary) from the standard (official, literary, academic) Romanian language (p. 13–14, 16, 23, 25–26, 32–33, 153 sq).

Based on ethnographic studies and recorded linguistic influences, the Vlach Romanians in Eastern Serbia are divided into the communities of *Țărani* (in Rom. = "peasants", from *țară* = "land, country") or *Mărginiți* (in Rom. = "people from the border", from *margine* = "border") and *Ungureni* (in Rom. = "coming from the Hungarian parts"). According to old and

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new historiography (Gustav Weigand, "Die rumänischen Dialekte der kleinen Walachei, Serbiens und Bulgariens", in: *Siebenter Jahresbericht des Instituts für Rumänische Sprache 7*, 1900, pp. 1–92; George Ciuglea, "Românii din Serbia", in: *Românii din Timoc*, vol. I, collection of sources by C. Constante and A. Golopenția, edited by Nicoleta Mușat, vol. I, Timișoara/București, Editura Marineasa/Editura Martor & Muzeul Țăranului Român, 1912/2008, pp. 148–161; Marijana Petrović-Rignault, *Description syntaxique et sémantique du valaque (un parler daco-roumain de Serbie)*, Université Paris Sorbonne–Paris IV, PhD dissertation in manuscript, 2008; Paun Es Durlić, *Sacred Language of the Vlach Bread*, Beograd, Balkankult Foundation, 2011; Petru Neiescu, Eugen Beltechi, Ioan Faiciuc, Nicolae Mocanu, *Atlasul Lingvistic Român. Graiurile dintre Morava, Dunăre și Timoc*, București, Editura Academiei Române, 2021), the *Țărani* are the lowlanders from the valleys of the Danube and Timok rivers in the eastern parts of Serbia, who came from the Romanian Principality of Wallachia (*Țara Românească*) after the 17th century, speaking "a Romanian variety similar to that in Western Oltenia" and forming 20% of the Vlach Romanian population in Eastern Serbia, while the *Ungureni* were shepherds and highlanders from the west, populating the mountainous region of this area between the Danube and Morava, speaking "a Romanian variety close to the Banat dialect" and having an accent from Banat, where from their ancestors had settled in the 18th-19th centuries, accounting for almost 80% of the mentioned population (pp. 16, 33–34, 45–48, 59, 64). The current state of the Vlach Romanian variety still spoken today in Eastern Serbia by the descendants of these *Țărani* and *Ungureni* can be read, in phonetic transcription and English translation, in a sample of valuable texts collected by the authors themselves (pp. 66–106).

The six chapters of this book are preceded by a necessary "Abbreviation List" (p. 11) and a summarizing "Introduction" (pp. 13–22); the chapters are succeeded by the appreciative "Acknowledgements" (pp. 233–234), ending with the consistent and up-to-date "Bibliography" (pp. 235–256).

The book chapters are structured as follows: I. The first offers a general presentation of "the Vlachs of Eastern Serbia", with regard to 1. their ethnonyms and 2. political geography, 3. the Romanians from Vojvodina, 4. ethnohistorical references in Serbian, Romanian, and German from the 19th-20th centuries describing the Romance-speaking population of Serbia (pp. 23–44). II. The second chapter offers a proper linguistic approach to "Vlach Romanian: A Language Profile", with the theoretical considerations of the authors (pp. 45–62) followed by a representative corpus of 10 transcriptions of the Romanian variety spoken in Eastern Serbia, with the English translations of the texts (pp. 63–106). III. The next chapter includes the "Publications in Vlach Romanian", starting from the 19th-century "pioneers", followed by the folklore collections of the second half of the 19th century, before finally turning to "the committed researchers, enthusiasts and organizations", as well as associations (like the *Ariadnae Filum*, or that of Gergina) of the 20th and 21st centuries (pp. 107–152). IV. The fourth and most sensitive but also boldest chapter of the book dares to show the "Ideological factions and the standardization of Vlach", in an unprecedented attempt to discern science

from politics (pp. 153–172). V. The fifth chapter is about "Vlach Romanian on the Internet", presenting websites (like those run by Paun Es Durlić or *Matica Vlaha*), electronic newspapers and Facebook pages (*Vlasi na kvadrat*) (pp. 173–198). VI. The last chapter of the book brings hope for the future of the endangered variety spoken today by the analysed population, in an attempt to find "The recent visibility of Vlach Romanian in the linguistic landscape of Eastern Serbia", by showing small signage (commercial signs, street names, toponyms, places of worship, graveyard inscriptions, *grafitti*), which speak about a symbolic language resurrection of the Vlachs (pp. 199–232).

In many regards, this book is the climax of a synthetic effort spanning 15 years of field research and continuous work on studying the Eastern Serbia's Romanian Vlachs, as Annemarie Sorescu-Marinković and Monica Huțanu admit (p. 18). The strengths of the book derive undoubtedly from the primary conditions, met by Annemarie Sorescu-Marinković and Monica Huțanu, of mastering 1. both (standard) Serbian and Romanian, 2. linguistics, philology and dialectology, 3. methodology and practice of field research within the analysed communities. These rare and *sine qua non* competences are hard to match and find in recent interpretations, which makes the book unique, especially its "Introduction" and Chapters II–VI.

The weaknesses of the present volume stem from the authors' minor specialization in broader social sciences, like history and political science. Consequently, in Chapter I (debating the ethnonyms, proposing the term "Vlach Romanians" and then not sticking to it throughout the book, instead switching between the denomination of "Vlachs" and "Romanians" according to the presented bibliography, mixing genuine historiography with policy-making approaches, confusing cultural activism with scholarship), a solid background of investigation, as well as the historical references are often inadequately defined and explained.

In fact, the authors have meritoriously done their part as sociolinguists describing the Vlach Romanians and their language (1945–2025), offering the reader a short history of the preoccupations regarding the folklore of the distinct ethnic communities. However, the volume dedicated to *The Vlachs of Eastern Serbia. Language and Society* also reveals, in my opinion, a pressing need for collaboration with historians to extend the research on this topic by also collecting and critically editing archival documents from earlier periods, the Middle Ages and the modern period, which mention the presence, organization and way of life of the Romance-speaking inhabitants of Eastern Serbia.

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