

**CROSS-CULTURAL RESILIENCE BUILDING**

**INTERKULTURELLE RESILIENZ STÄRKEN**

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## *Editors' Preface*

Dear Reader,

It is a great pleasure to present the second English-German special issue of the journal *Tudásmenedzsment*. This volume is special in several ways. The editing of the special issue was carried out in the collaboration of the editor-in-chief Zsuzsa Koltai and Professor Matthias Theodor Vogt as guest editor. The idea of creating this special issue of the journal was formulated within the framework of the "Gastprofessorinnenprogramm Sachsen / Saxon Visiting Professor program" announced by the Saxon Ministry of Science, Culture and Tourism and successfully implemented by the Hochschule Zittau/Görlitz Faculty of Management and Culture in 2022 under the direction of Professor Vogt which enabled some of the authors published in this volume to conduct research in Görlitz or to participate at professional events held within the framework of the program. In addition to the authors specifically related to the Saxon Visiting Professor Program, the journal *Tudásmenedzsment* also announced its publication call for this volume in the form of an open call, to which many authors from Hungary and other countries sent their studies dealing with various aspects of cross-cultural resilience.

The thematic special issue entitled "Cross-cultural resilience building" presents papers by authors from six different countries, Austria, Georgia, Germany, Hungary, Mongolia, and Slovakia. The volume contains 11 studies in English, and one in German. In addition to university professors and instructors, there are also PhD students, practitioners and researchers among the authors.

In addition to the members of the editorial board, we also involved an external reviewer in the double-blind peer review work related to the volume. We would like to express our gratitude to Prof. dr. Anton Sterbling, retired professor at the University of the Saxon Police in Rothenburg/OL and all the members of the editorial board involved in reviewing the studies included in the volume, for contributing to the publication of high-quality papers with their thorough reviews.

Cross-cultural resilience has become an important issue nowadays. The coexistence of cultures and their influence on each other has become a prominent research area of both cultural studies and social sciences. In the promotion of cross-cultural resilience, the state and local government institutions and the civil sector are equally important in our culturally diverse societies. The studies in the volume revealing the results of theoretical and empirical research can serve as an important addition both to the further scientific study of the topic and to the consideration and development of initiatives promoting cross-cultural resilience.

November 2023

Zsuzsa Koltai & Matthias Theodor Vogt  
Editors of the special issue

*Matthias Theodor Vogt*

*MANAGING DIFFERENCE: PRELIMINARY RESEARCH TO AN  
ENCULTURATIONAL CARE STRATEGY IN THE TRIPLE PERIPHERY OF  
EASTERN SAXONY, LOWER SILESIA AND NORTH-EASTERN BOHEMIA*

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**Abstract**

There may be areas in the world where reflection on strengthening intercultural resilience belongs to the group of amenities—nice to have, but not a must be, and a mere object of evening chit-chat among well-mannered people, after which the brave citizen goes to bed. The triple periphery of East Saxony, Lower Silesia and North-East Bohemia does NOT belong to this type of area. Here, on the contrary, the future of society and its economy, depends on successful intercultural resilience, and not least its political including its party-political preferences.

For the following reflections, we choose the example of the care labour market and focus in particular on the situation in the German part of the European City of Görlitz-Zgorzelec as pars pro toto of the three-countries'-region. A small preliminary empirical study by Monique Ritter commissioned by us can be found in the same volume.

The intercultural integration of care workers from overseas requires special efforts. Max Frisch (1965) wrote about the situation of Italian “guest workers” in Switzerland: They have called for labour, and human beings are coming. This sentence has a special truth when it comes to people who come from far away and hope to find a new home here.

A critical question to be asked in the following is whether the city of Görlitz is at all suitable for such a project, and how the research can do justice to the complex situation in the border triangle. Can the findings from Leipzig (Decker et al., 2023) be transferred one-to-one to the situation in Görlitz? What insights does a more detailed analysis of crime and constitutional protection statistics offer for the safety of foreign trainees in Görlitz? What is the need for research on enculturation? This article concentrates on the background picture from which the concrete research on care will start.

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*Keywords: enculturation; nursing shortage; welcome concept Görlitz*

**Introduction**

In the city of Görlitz, firstly, the proportion of people aged over eighty will have almost quadrupled between 1990 and 2025 (Vogt, 2021) and the need for care will have increased accordingly. Secondly, for every sixty-year-old retiring woman, there follows only about half a twenty-year-old woman (Vogt, 2021) Thirdly, the often reprinted narrative of poor pay in the nursing professions caused, that the willingness to take up the physically and mentally demanding nursing profession is less than before. (In fact, remuneration has in the meantime risen very significantly to about EUR 3,500 employee gross salary per month, including shift supplements (Beutler, 2022). The first factor corresponds to an increase in demand for care workers by a factor of 4, the second corresponds to a doubled increase in

demand due to a halved skilled labour market (resulting in a combined factor of 8), the third corresponds to an increase in demand due to a further deterioration in the supply of skilled labour (combined factor of 10-12 of the existing domestic care worker market).

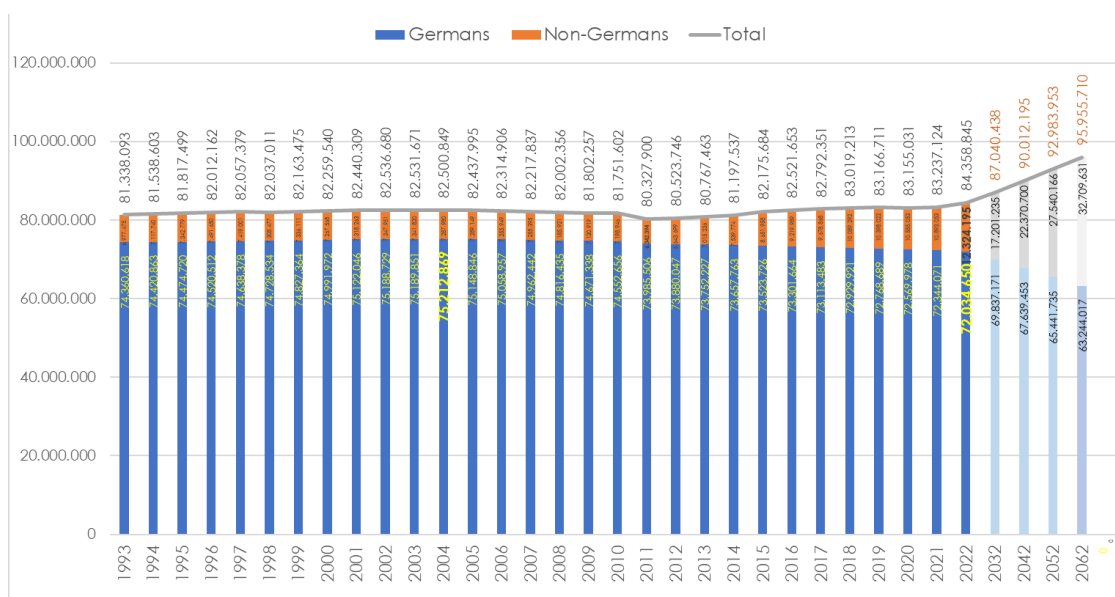
This has the consequence that the vocational training places “nursing” at the hospital academy of the district of Görlitz still do not sufficiently take into account the increasing demand. However, even the existing places can no longer be filled with regional junior staff. As of 01.07.2023, as few as 32 applications had been received for the 90 places for the winter semester starting 01.09.2023, i.e. only one third of the available training places (Beutler, 2023). Where will the missing two-thirds of apprentices come from?

The recruitment of foreign trainees is inevitable. However, the situation in the immediate neighbouring Lower Silesia and North-East Bohemia is analogous. In Lower Silesia, the average age of nursing staff is 54.3 years, 5.7 years before the Polish retirement age for women. By 2028, replacements for 65% of the current nursing staff must be found or a good 9,000 new nursing staff must be trained. This cannot be achieved from within the EU; however, the Polish care system is almost entirely mono-national in structure. The proportion of non-EU nurses is only 1.19%, almost all of whom are Ukrainian. The problem of fears of foreign infiltration is even more acute than in Germany due to the political course of the PIS.

However, the trust of locals in foreigners has not exactly been increased in the last three decades by the experiences of transformation and emigration in the populations of Eastern Saxony (whose grandchildren often grow up many hundreds of kilometres away from their grandparents), Lower Silesia (one only has to think of the seven daily flight pairs between Wrocław and Dublin in the heyday of Polish emigration) and North-Eastern Bohemia (with its almost universal poaching of health personnel by Great Britain, Norway or Germany).

Here it is the task of politics to transform undifferentiated stereotypes towards groups into a subject-centred realistic perspective that enables the population to experience immigration and its opportunities as an enrichment of their own situation. It is the task of science to soberly analyse the complex processes without normative presumptions. Germany is going to change radically from its traditional inbound view of the world with a mere 9.0 % share of foreign passport holders (as of 1993 after at the beginning of reunification statistics) to an integration society with a quota of 14.6 % (as of 2022 [Statistisches Bundesamt, 2023a]); for a detailed analysis of first and second generation migrants see Vogt et al., 2016). In the big cities, there is already a share of 50% and more of pupils with foreign-born parents in several school classes. Within the next forty years, the proportion of Germans in the population will shrink sharply, and the proportion of foreigners is difficult to estimate. In any computer with a forecasting programme, it can be projected that, continuing recent trends, the foreigner quota could be 20% in 2032 and 34% in 2062 (Statistisches Bundesamt, 2023a). However the figures develop: In any case, a shift in the mentality of the German population towards cosmopolitanism is necessary, mind you, in their own interest. In short, the task is to learn how to manage differences. This requires active willingness of the citizens, and cannot simply be commanded by any government *par ordre du mufti*.

Fig. 1.: German and Non-German Population, Germany 1993-2002, and prognosis 2022-2062



Source: Statistisches Bundesamt, 2023a  
(The calculation and the graph were prepared by the author)

## Demographic starting point

The projected research project “Managing difference. Enculturational Care Strategy in the Triple Periphery of Eastern Saxony, Lower Silesia and North-Eastern Bohemia” has developed organically from a delegation trip Culture & Religion of the German Chancellor’s Commissioner for Africa 2018, Günter Nooke (Nooke et al., 2018), as a result of which the Institute for Cultural Infrastructure Saxony 2021 sq. was able to bring an exhibition “Cameroon through the eyes of a thousand women”, conceived by African women themselves, to Germany and Poland, and soon to Hungary (Vogt et al., 2021b). In turn, against the background of the large youth cohorts in sub-Saharan Africa on the one hand and the excessive need for nurses in the Görlitz area (and the same situation in Lower Silesia and north-eastern Bohemia) on the other, a trinational training and research project has grown out of the work on the exhibition, the implementation of which is planned for the years 2024-2027.

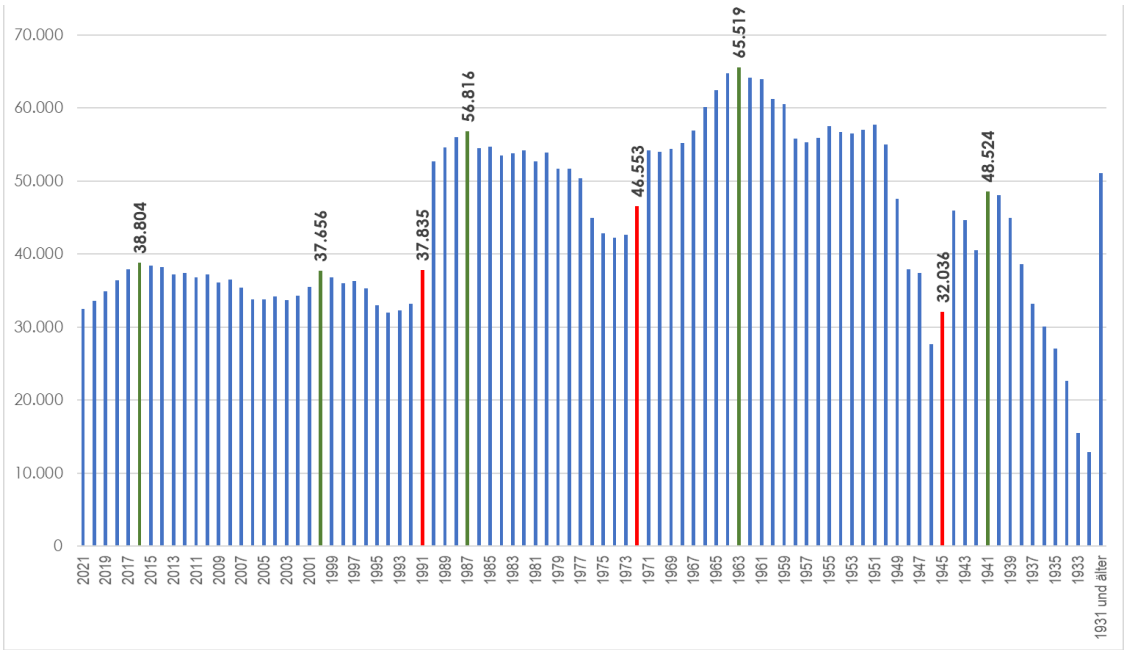
The research approach chosen was the implementation and observation of an *Intercultural Year of Nursing Görlitz* (based on the voluntary social year). It which will bring 24 candidates from all over the world to Görlitz in three years in 2024, 2025 and 2026, each starting on 1 September, and which will allow rich scientific observation opportunities on several levels. The content of the Voluntary Social Year will be essentially characterised by (1) language instruction in the three language levels essential for the nursing profession (a) medical lexis and jargon, (b) terms in written German, (c) colloquial and dialectal terms; (2) artistic workshops, including workshops together with the city population, nursing teams, old people's homes, etc.; (3) the exchange of ideas and experiences. (3) intercultural seminars, and of course (4) practical work, to which the second of three trimesters is dedicated.

A critical question to be asked in the following is whether the city of Görlitz is at all suitable for such a project, and how the research can do justice to the complex situation in the border triangle. First, however, the demographic starting point must be presented.

**Structural change in the extra-metropolitan area of Eastern Saxony**

The sharply diverging cohort strengths of Saxony's population at the end of 2021 provide a clear picture of the historical transformation shocks in connection with the four system changes between 1918 and 1990—from (1) the Imperial German Reich to (2) the Weimar Republic to (3) National Socialism to (4) the Soviet occupation zone and the GDR to (5) the all-German Federal Republic. The birth rate reflects objective deprivations such as the war and post-war periods and long-term effects such as the birth spike in 1944 on the grandchild generation, but not least also confidence in the future. At present, Saxony is not only characterised by the declining number of women of childbearing age, but also by extreme shocks. Compared to the births in 2016 with 38,804 children (100.0 %), this results in 97.6 % (2017); 93.8 % (2018); 89.8 % (2019); 86.6 % (2020); 83.6 % (2021) (Statistisches Landesamt Sachsen, 2023).

Fig. 2.: Population of Saxony as of 31.12.2021 by age group



Source: Statistisches Landesamt Sachsen, 2023 (The graph was created by the author)

Among the German Länder, Saxony and Brandenburg are particularly dependent on medium-term resilience reinforcement, as they are among the focal points of the German phase-out of coal-fired power generation. In terms of social cohesion, it is the task of politics to stabilise self-supporting forces in the former coal regions and to identify and eliminate resilience-reducing forces. As a result of the pandemic and inflation, a lack of confidence in the future can be observed throughout Germany, as well as, on the one hand, an



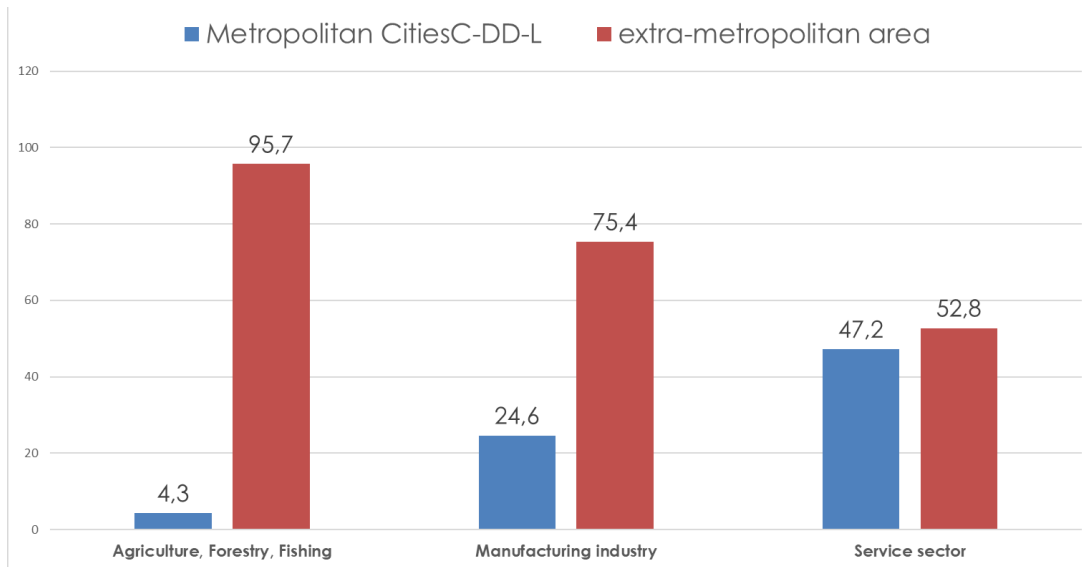
agora fatigue of considerable parts of the population and, on the other hand, a para-religious critical agora with processions, pilgrimages, sermons, votive flags every Monday evening, also in Görlitz, for the demonstration of anti-democratic propaganda.

After years of negotiations between the affected population, industry, federal states and the federal government, it was determined by law in 2020 that the last coal-fired power plant in Germany should be shut down in 2038 (Deutscher Bundestag, 2020a). By then, secure and sustainable jobs are to be created in the previous coal regions by financing structural change at the amount of 40 billion euros (Deutscher Bundestag, 2020b). Immediately after the law was passed, however, the current federal government agreed in its coalition agreement (SPD, Bündnis90/Die Grünen, FDP, 2021) to bring forward the coal phase-out to 2030 by eight years, thereby causing very considerable irritation among the population. It rightly questions the reliability of politics. This contributes to the manifest alienation of about one third of the population from the political system. The polling trend of the last few months indicates that the current governing coalition only has a narrow majority. The Alternative for Germany (AfD), which is based among other things on xenophobic populism and rhetorically presents itself as the 'Alternative to Germany' (AtD), achieved the top position among Saxony's political parties with 32.5 % (Neueste Wahlumfragen im Wahltrend zur Landtagswahl in Sachsen, n.d.).

The decision on the earlier coal phase-out in 2030 once again confirms the opinion of parts of the population that Berlin's decisions are detached from the real conditions beyond the metropolises and that the conditions within the districts are not sufficiently taken into account by Berlin (Gerlach, 2016). The term "rural area", which is often used in the media and the metropolises, is inaccurate insofar as the population predominantly pursues urban occupations (agriculture, forestry and fishing account for only the usual 1 % (Statistisches Landesamt Sachsen, 2023). But even these have long been highly technologised and cannot be managed without knowledge of the relevant EU regulations and support measures). It would therefore be correct to speak of the "metropolitan-remote" or "extra-metropolitan" areas.

In the media there is a distorted picture of the relationship between the economic weight of the metropolitan cities Chemnitz-Dresden-Leipzig (1/3 of the population) on the one hand, and the ten counties on the other (2/3 of the population). In fact, within Saxony, firstly the share of the metropolitan cities Chemnitz-Dresden-Leipzig in Saxony's manufacturing industry is almost negligible (25 % compared to 75 % in the extra-metropolitan area), secondly the share of Saxon service jobs in the extra-metropolitan area (53 %) is also higher than that of Chemnitz-Dresden-Leipzig (47 %) (Statistisches Landesamt Sachsen, 2023). The extra-metropolitan area dominates in all three economic sectors.

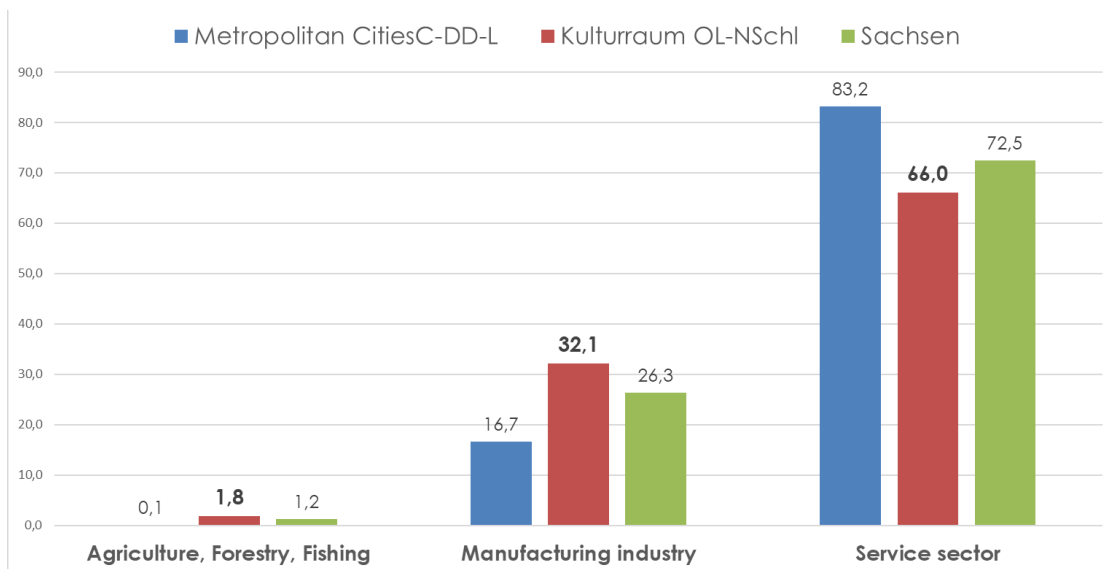
Fig. 3: Employed persons in Saxony 2021 by economic sector in percent Metropolitan cities Chemnitz-Dresden-Leipzig versus extra-metropolitan area



Source: Statistisches Landesamt Sachsen, 2023 (The graph was created by the author)

In the two counties of Bautzen and Görlitz (hereinafter: Kulturraum [cultural area] Oberlausitz-Niederschlesien), two thirds of the workforce work in service jobs (Statistisches Landesamt Sachsen, 2023), many of them highly specialised and placing correspondingly high demands on the quality of life.

Fig. 4: Economic sectors 2021: Saxony versus metropolitan cities Chemnitz-Dresden-Leipzig versus cultural region Upper Lusatia-Lower Silesia

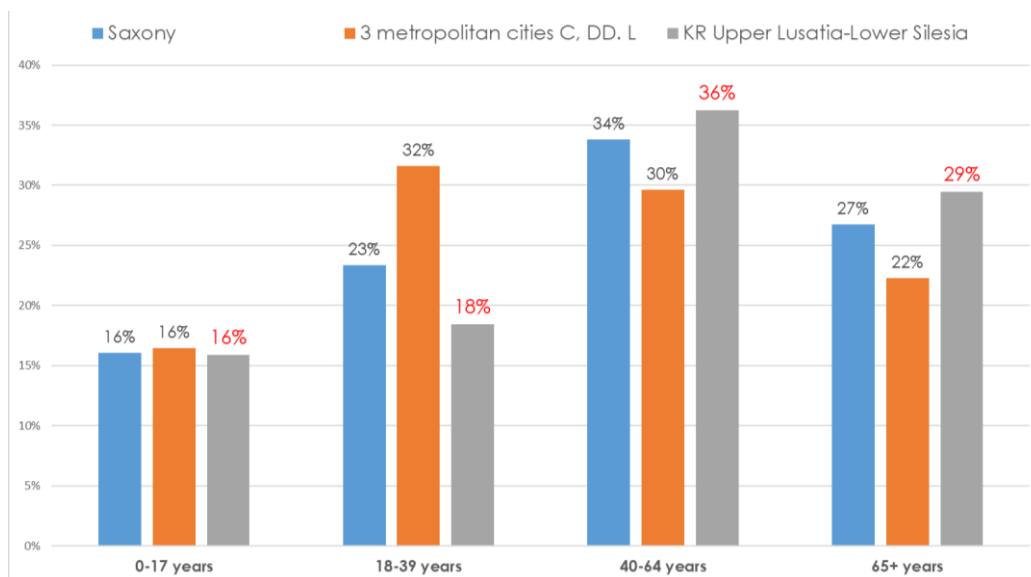


Source: Statistisches Landesamt Sachsen, 2023 (The graph was created by the author)

The central resilience problem is the distribution of age cohorts. While the cohorts of 18-29 year-olds make up a third of the population in the three metropolitan cities of Chemnitz-Dresden-Leipzig (32 %), they make up only half of this in the cultural region, namely a good sixth (18 %) (Statistisches Landesamt Sachsen, 2023). The central task of

municipal *Daseinsvorsorge* (services for good life) must therefore be to take care of the cohort of 18-39 year-olds, who have dropped out and are continuing to drop out.

Fig. 5: Age Cohorts Saxony versus Metropolitan Cities Chemnitz-Dresden-Leipzig versus Kulturraum Upper Lusatia-Lower Silesia

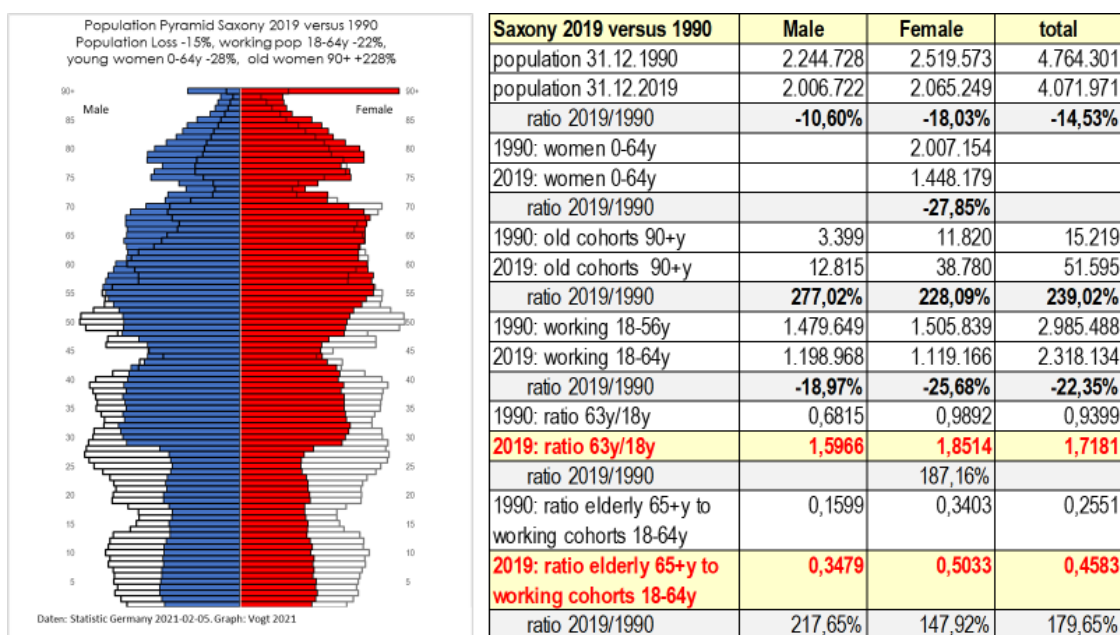


Source: Statistisches Landesamt Sachsen, 2023 (The graph was created by the author)

### Demography Saxony and Eastern Saxony

A look at the population “pyramid” of Saxony—with a narrow base and a broad top rather like a ‘population mushroom’—is somewhat deceptive in that here the three metropolitan regions of Leipzig, Dresden and Chemnitz lead to a certain levelling in the number of young people as well as the number of old people. But here, too, the strongest cohort for both women and men is aged 55-59.

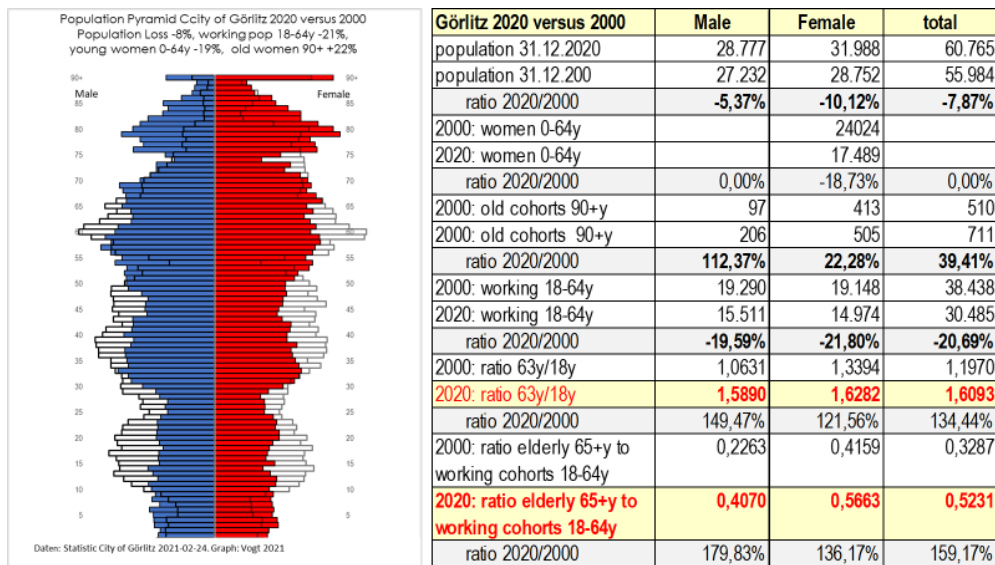
Fig. 6: Population pyramid Saxony 2019 compared to 1990



Source: Statistisches Bundesamt, 2023 (The calculation and graph were made by the author)

A look at the situation in the district city of Görlitz (medium-sized city with 56,000 inhabitants in 2023) is more meaningful for the situation in the peripheral regions. In 2000, the strongest age cohort was the then 60-year-old women. Twenty years later, in 2020, the strongest cohort was women of 80. One third of women over 18 are aged 65+. For every woman who retires at 60+, there are less than half as many females aged 18-20 (Vogt, 2021). The demographic situation outside the district centre of Görlitz in the actually rural areas of Eastern Saxony (Germany) below 20,000 inhabitants per municipality as well as in the rural areas of Lower Silesia (Poland) and the district of Liberec (Czech Republic) is even more drastic (Statistisches Landesamt Sachsen, 2023).

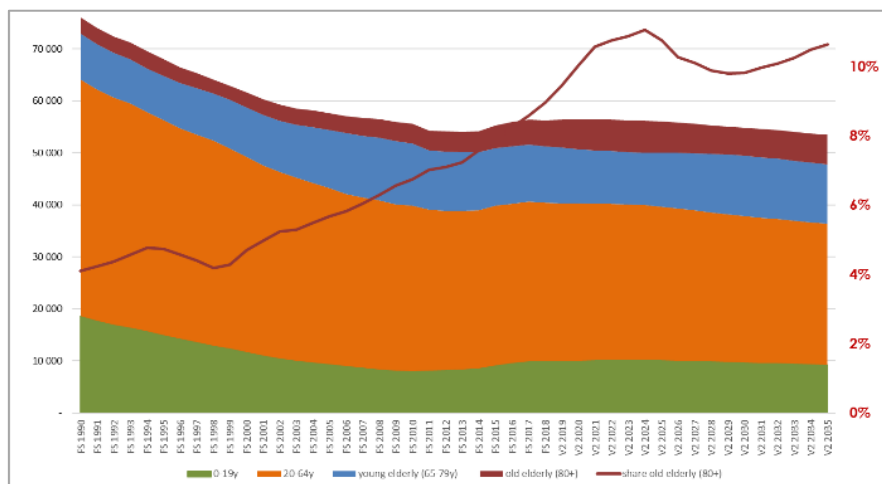
Fig. 7: Population pyramid City of Görlitz 2020 compared to 2000



Source: Stadt Görlitz, 2022 (The calculation and graph were made by the author)

From 1990 to peak 2025, the proportion of cohorts 80+ years will have almost tripled from 4.1% to 11.1% and then level off around 10% (Vogt, 2021).

Fig. 8: Share Old Elderly 80+ years in the City of Görlitz 1990–2018–2035

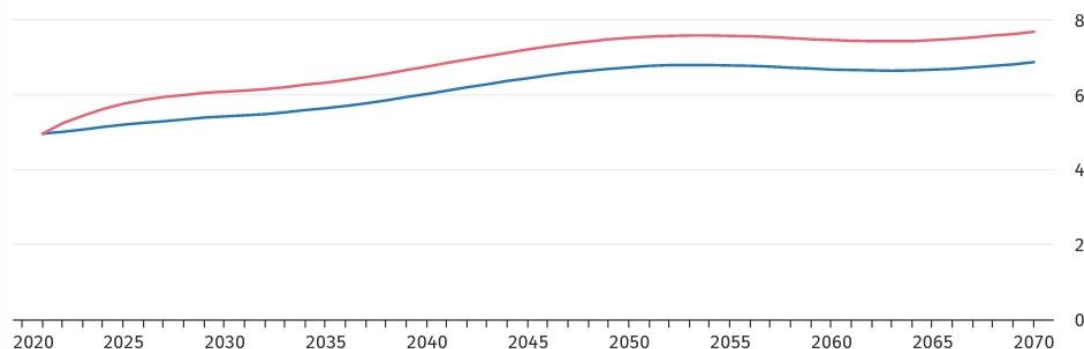


Data: Statistisches Landesamt Sachsen, 2023  
 (The calculation and graph were made by the author)

### Nursing care projection of the Federal Statistical Office (30.03.2023)

On 30 March 2023, the Federal Statistical Office presented a “Long-term projection of care needed–Germany and federal states for the reporting period 2022-2070” under EVAS number 12421, 22421. The Federal Office calculates 6.8 million persons in need of long-term care by 2070, assuming a constant care rate (Statistisches Bundesamt, 2023).

Fig. 9: Persons in need of long-term care in Germany 2021 to 2070, in millions



Source: Statistisches Bundesamt, 2023b

With an increasing care rate in connection with the expanded concept of need for long-term care, the Federal Office calculates a care rate of 7.1 million persons in need of long-term care (in the mean of the ten variants presented; minimum 6.156 million, maximum 8.498 million) (Statistisches Bundesamt, 2023). The mean value corresponds to 15.7 % of the working population of 45.3 million people (2019) (Statistisches Bundesamt, 2023). Since the nursing ratio in outpatient care is one nurse per two persons in need of care and in inpatient care the ratio is approximately one to one (Bundesgesundheitsministerium, 2023), this ratio alone indicates the tendency of demographic development to overstretch national resources. This can only be offset by increasing the number of working people in line with the increase in the number of senior citizens, i.e. through qualified immigration into the labour force.

Whereas the Free State of Saxony is currently among the leaders in the elderly ratio, the majority of German states still have this development ahead of them; by 2055, for example, the Federal Office forecasts an increase of 51 % in the number of people in need of long-term care for Baden-Württemberg, and only 11 % for Saxony (Statistisches Bundesamt, 2023). Since Baden-Württemberg has disproportionately richer resources, it has favourable conditions for recruitment projects - and above all for attempts at poaching, e.g. from Saxony.

According to the findings of the Statistisches Bundesamt (2023b), in Saxony itself, the ratio of those in need of care in 2020 to those in need of care in 2070 [calculated from Table 12421-14] shows an increase of 300 % for men 90+ and 174 % for women 90+ (Nota bene: an intra-regional analysis for eastern Saxony is not available from the Federal Office's tables).

Fig. 10: Increase in persons in need of long-term care in Saxony 2070 to 2022

Age	Persons in need of care Total			Outpatient services			Full inpatient			Care allowance - Care by relatives			Care level 1 - Without benefits		
	Total	Men	Women	Total	Men	Women	Total	Men	Women	Total	Men	Women	Total	Men	Women
2022 [in Thousand]	312	118	194	79	26	53	48	14	34	149	65	84	36	13	23
2070 [in Thousand]	347	137	210	92	33	59	61	19	42	158	72	86	36	14	22
<b>2070 Total</b>	<b>111,2%</b>	<b>116,1%</b>	<b>108,2%</b>	<b>116,5%</b>	<b>126,9%</b>	<b>111,3%</b>	<b>127,1%</b>	<b>135,7%</b>	<b>123,5%</b>	<b>106,0%</b>	<b>110,8%</b>	<b>102,4%</b>	<b>100,0%</b>	<b>107,7%</b>	<b>95,7%</b>
under 15	83,3%	75,0%	100,0%							80,0%	71,4%	100,0%	100,0%	100,0%	0,0%
15 - 60	87,1%	82,4%	85,7%	80,0%	66,7%	100,0%	50,0%	100,0%	100,0%	90,0%	90,9%	88,9%	100,0%	100,0%	100,0%
60 - 65	69,2%	71,4%	66,7%	66,7%	50,0%	100,0%	50,0%	100,0%	0,0%	66,7%	66,7%	66,7%	50,0%	100,0%	100,0%
65 - 70	70,6%	77,8%	75,0%	75,0%	50,0%	50,0%	100,0%	100,0%	100,0%	75,0%	60,0%	75,0%	100,0%	100,0%	100,0%
70 - 75	75,0%	81,8%	75,0%	80,0%	100,0%	66,7%	66,7%	100,0%	100,0%	75,0%	83,3%	66,7%	100,0%	100,0%	100,0%
75 - 80	90,6%	92,3%	85,0%	87,5%	100,0%	80,0%	100,0%	100,0%	66,7%	87,5%	100,0%	77,8%	100,0%	100,0%	100,0%
80 - 85	95,7%	104,3%	89,4%	94,7%	100,0%	92,3%	90,0%	100,0%	85,7%	96,9%	108,3%	90,0%	100,0%	150,0%	85,7%
85 - 90	123,2%	145,0%	114,3%	119,0%	133,3%	113,3%	123,1%	133,3%	110,0%	124,1%	140,0%	115,8%	114,3%	150,0%	120,0%
<b>90+</b>	<b>202,2%</b>	<b>300,0%</b>	<b>174,3%</b>	<b>200,0%</b>	<b>300,0%</b>	<b>172,7%</b>	<b>207,7%</b>	<b>300,0%</b>	<b>181,8%</b>	<b>193,8%</b>	<b>300,0%</b>	<b>172,7%</b>	<b>250,0%</b>	<b>200,0%</b>	<b>150,0%</b>

Source: Statistisches Bundesamt, 2023b (The calculation was made by the author)

#### Consequence of demography for the care sector

Due to this demographic situation, the continuous renewal of the labour force in the area of care in Eastern Saxony (DE), Lower Silesia (PL) and Liberec County (CZ) is no longer feasible from two sides.

On the one hand, a fierce struggle has begun among all economic actors for the potential next generation of school leavers. On the other hand, at the same time, society's need for nurses is growing in proportion to the increase in the elderly population. As a result, the annual 120 training places at the Görlitz Hospital Academy, which bundles professional nursing training for the entire county, would have to be increased considerably. In fact, however, the training places at the Görlitz Hospital Academy can no longer be filled by young people from eastern Saxony - as of 1 July 2023, there were only 32 applications for the 90 places for the winter semester from 1 September 2023 (Beutler, 2023), i.e. only one third of the available training places. Where will the missing two-thirds of trainees come from? (Other German training institutions are already advertising even higher training allowances as well as scholarships for flights, language courses and recognition abroad).

Since the demographic situation is similar in Poland, the Baltic States, the Czech Republic, Slovakia, the successor states of Yugoslavia, Republic of Moldova, Romania, Bulgaria, southern Italy, etc., and since all other parts of the European Union are much stronger economically and thus incomparably more attractive in terms of wages and other working conditions than the triple periphery of eastern Saxony, Lower Silesia and north-eastern Bohemia, there is no other way out in the medium term than extra-continental immigration from Africa, Asia and South America (Lessenich, 2016).

Before the Görlitz city council on 29.06.2023 and in the head lines Görlitz of the Sächsische Zeitung, the managing director of the municipal clinic, Ines Hofmann, stated: "Clinic director: Without nursing staff and doctors from abroad it won't work" (Sächsische Zeitung, 2023). But are the city of Görlitz and the district of Görlitz a favourable environment for immigration? How safe are foreigners in Görlitz compared to other German cities?

#### Görlitz as a safe environment for immigration?

In June 2023, we received news from Cameroon that parents of potential candidates had contacted the mayor of Bafoussam, in response to a call for applications for Görlitz

care positions by the city of Bafoussam. The parents were worried because only devastatingly xenophobic statements could be found on the English-language internet—about East Germany in general, about Saxony in particular, and about East Saxony and Görlitz in specifically. The mayor then mobilised a film team to research a sober picture of reality and sent it to Görlitz from 13-16 June.

### **Authoritarianism findings 2023 of the Else-Frenkel-Brunswik Institute at the University of Leipzig**

The findings of the Cameroonian parents essentially coincide with the results of a representative survey conducted by the Else-Frenkel-Brunswik Institute at the University of Leipzig, which reported on 28 June 2023:

The clear majority of East Germans can identify with democracy as an idea, but less than half are satisfied with their everyday experience of democracy. This was the result of a representative survey conducted by the Else-Frenkel-Brunswik Institute of the University of Leipzig among 3,546 people from the eastern German states. [...] The study also found a high level of approval for right-wing extremist statements in the eastern German states. Chauvinistic and xenophobic statements were only rejected by a minority of the respondents, the project leaders emphasised. Elements of neo-NS ideology were not openly expressed to the same extent, but anti-Semitic and Social Darwinist statements also met with approval - one third of the population agreed with them completely or in part. The approval is pronounced in the federal states of Saxony, Saxony-Anhalt and Thuringia. Here, the potential for extreme-right and neo-Nazi parties to find voters is particularly high. Every second person wants a 'strong party' that embodies the 'national community' as a whole. Instead of pluralistic diversity of interests, a *völkische Gemeinschaft* is desired'. (Universität Leipzig, 2023).

Well, part of the questions cannot be topped in terms of suggestion, for example in the following three questions: (1) "In the national interest, a dictatorship is the better form of government under certain circumstances." (2) "What Germany needs now is a strong party that embodies the *Volksgemeinschaft* as a whole." (3) "We should have a leader who will rule Germany with a strong hand for the good of all." This then leads to approval ratings of (1) 8.6 % manifest and 22.1 % latent, (2) 26. 3% and 24.9 %, (3) 14.0 % and 19.1 % (Universität Leipzig, 2023).

The questions used to identify xenophobia were similar: (1) "The foreigners only come here to take advantage of our welfare state." Agreement 41.3% manifest, 28.2% latent, together 69.5% or two thirds of respondents. (2) "When jobs become scarce, foreigners should be sent back home." Agree 29.8 % and 23.4 %, together 53.2 %. (3) "The Federal Republic is over-alienated to a dangerous degree by the many foreigners." Agreement 36.6 % and 24.8 %, together 61.4 % or almost two thirds of the East German population (Universität Leipzig, 2023).

Fig. 11: Manifest-right attitudes in the dimensions of educational attainment; gender; age group; employment group; equivalised income; among party voters (in per cent)

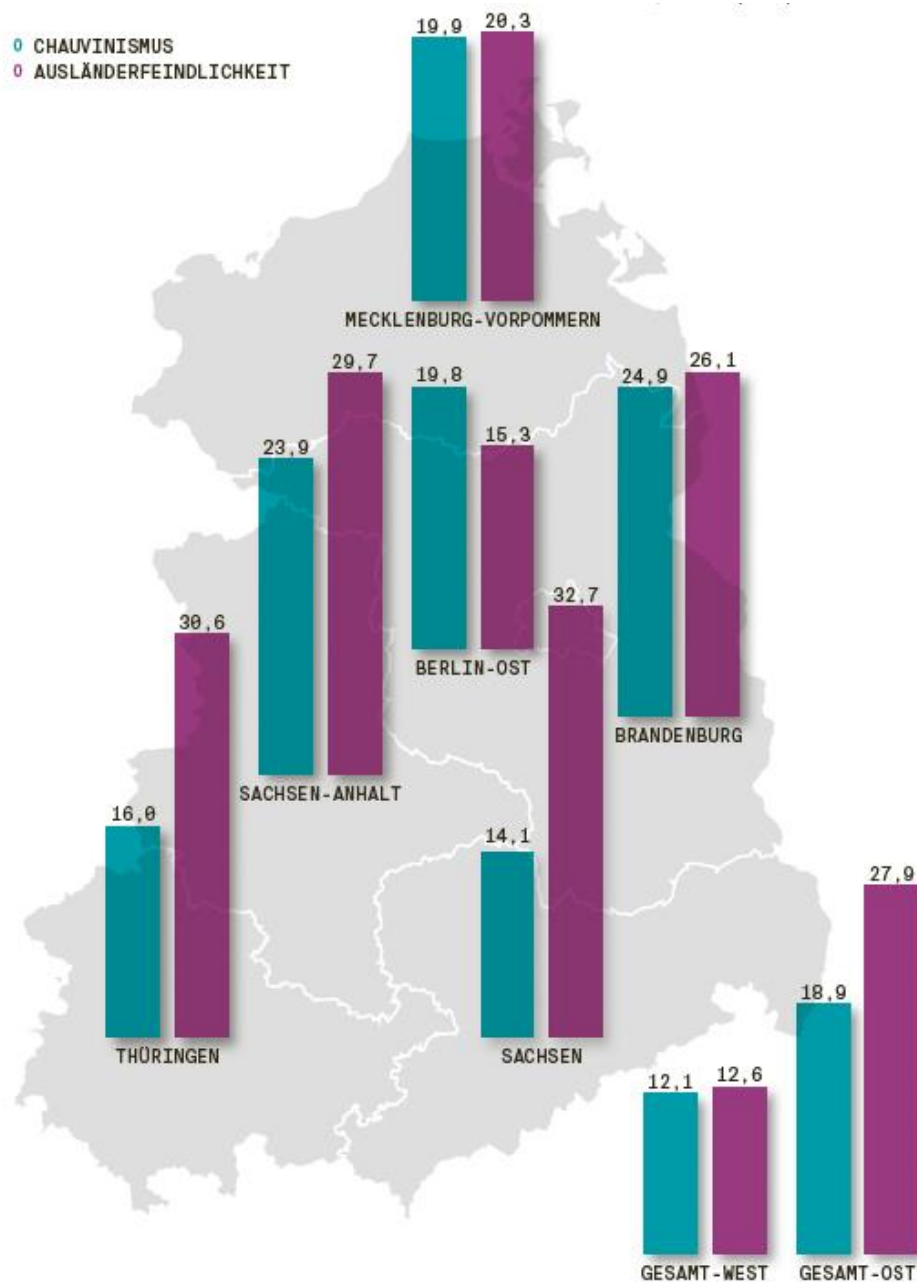
Manifest-right attitudes per dimension (in %) Survey: Decker et al (2023). Depiction: Vogt (2023)			NEO-NS-IDEOLOGY				ETHNOCENTRISM	
			Advocacy Dictatorship	Anti-Semitism	Social Darwinism	Trivialisation of National Socialism	Chauvinism	Xenophobia
<b>Educational level</b>	with A-levels	(N = 999)	2,8	2,5	2,5	1,1	10,5	<b>13,2</b>
	without A-levels	(N = 2532)	7,9	6,8	5,4	2,4	22,3	<b>33,5</b>
<b>Gender</b>	Men	(N = 1713)	6,6	5,9	3,8	2,1	20,8	<b>29,6</b>
	Women	(N = 1830)	6,2	5,2	5,3	2	17,2	<b>26,2</b>
<b>Age group</b>	16 -30	(N = 513)	4,5	2,9	3,9	1	16,1	<b>18,3</b>
	31 - 60	(N = 1833)	7	6,5	4,7	2,7	18,8	<b>30,8</b>
	> 60	(N= 1200)	6,4	5,2	4,7	1,5	20,4	<b>27,4</b>
<b>Employment group</b>	Education / Military service	(N = 241)	4,2	3,7	4,1	1,7	17,9	<b>12,5</b>
	Employed	(N = 1991)	6,4	5,3	4,3	2,1	17,7	<b>29,1</b>
	Unemployed	(N = 169)	10,1	9,8	6	4,8	30,4	<b>42,3</b>
	Housewife / househusband	(N = 50)	14,3	8,3	14,3	2	28,6	<b>42,9</b>
<b>Equivalent income</b>	Retired	(N = 1067)	6,1	5,6	4,6	1,5	19,3	<b>26,3</b>
	under 1.000 €	(N =414)	8,5	9,7	8,5	3,9	24,3	<b>36,4</b>
	1.000 to 2.000 €	(N =1648)	7,5	6,1	3,8	1,6	18,9	<b>33,3</b>
	2.000 till 3.000 €	(N =920)	4,7	3,6	3,8	2,6	18,6	<b>19,9</b>
<b>Among party voters</b>	more than 3.000 €	(N =486)	4,2	3,4	5	1,3	15,8	<b>18,5</b>
	CDU / DSU		3,6	2,3	2,5	0,6	12,9	<b>18,8</b>
	SPD		2,7	5,2	3,8	0,3	15,3	<b>22,3</b>
	FDP		4,6	2,3	4,6	0	19,3	<b>17,1</b>
	Greens		1,2	1,6	1,2	0	5	<b>15,9</b>
	The Left		2	3	0	0	8	<b>21,2</b>
	AfD		22,3	14	8,4	8,5	50,2	<b>59,1</b>
	Non-voters		6,1	6,8	5,7	2,8	20	<b>39,5</b>
	Party choice uncertain		4,4	3,3	4,4	1,2	11,6	<b>17,2</b>
<b>Rest</b>	Voter participation uncertain		7,7	7,9	8,3	3,2	23,2	<b>31,2</b>
	Rest		7,8	6,3	5,7	2,3	20,9	<b>25,7</b>

Source: Decker et al., 2023  
(The depiction was created by the author)

In terms of chauvinism, Saxony ranks last among the East German states. In terms of xenophobia, Saxony ranks first. With 12.1 and 12.6 % respectively in the western German states, foreigners are obviously well advised to settle - if at all - rather in the west of Germany (Universität Leipzig, 2023). At least if one is to follow the Leipzig study.



Fig. 12: Right-wing extremist attitudes in the eastern German Länder, 2022  
(in per cent) (Green: chauvinism, red: xenophobia)



Source: Decker et al., 2023; Reprinted with kind permission of the authors.

Outside their study (in an appendix after the bibliography which is hard to find and, as far as we can see, not cited by any of the media) Decker et al. (2023) add in Table 8 the “Distribution of disagreement and agreement with the statements of the right-wing extremism questionnaire (in percent)”. In the following table, which we have expanded, the highest agreement value in each case is marked in red. Overall, contrary to what the press release suggests, there is a clear picture of predominant rejection of the suggestive questions with a mostly multiple ratio between rejection and agreement (with the two exceptions of foreigners & the welfare state, and national sentiment).

Fig. 13: Distribution of disagreement and agreement with the statements of the right-wing extremism questionnaire (in per cent)

Distribution of disagreement and agreement with the statements of the right-wing extremism questionnaire (in %) Table 8 of the study Decker et al. (2023), in the appendix after the bibliography. Graph: Vogt 2023	Disagree completely	Disagree predominantly	Disagree manifestly and latently	Agree partly Disagree partly	Agree manifestly and latently	Agree mostly	Fully agree	Ratio of disagreement to agreement
Dictatorship is the better form of state	49,2	20,1	69,3	22,1	8,6	6,72	1,88	8,06
Without the extermination of the Jews, Hitler would be considered a	64,06	14,88	78,94	14,02	7,04	5,32	1,72	11,21
Germany needs a single strong party that embodies the	32,9	15,92	48,82	24,91	26,27	16,83	9,44	1,86
Führer who rules Germany with a strong hand for the good of all.	50,31	16,54	66,85	19,13	14,01	9,45	4,56	4,77
As in nature, the strongest should always prevail in society.	43,47	21,71	65,18	22,48	12,35	8,88	3,47	5,28
Foreigners come only to exploit our welfare state.	16,86	13,64	30,5	28,17	41,33	20,58	20,75	0,74
Even today, the influence of the Jews is too great.	46,37	19,87	66,24	22,61	11,16	6,95	4,21	5,94
Have the courage to have a strong national feeling.	23,27	12,26	35,53	27,72	36,74	21,91	14,83	0,97
Germans inherently superior to other peoples.	49,13	19,24	68,37	21,12	10,51	6,78	3,73	6,51
Send foreigners back when jobs are scarce.	28,46	18,33	46,79	23,39	29,82	14,37	15,45	1,57
Crimes of National Socialism exaggerated in historiography.	63,56	16,6	80,16	13,88	5,96	4,21	1,75	13,45
Hard and energetic assertion of German interests against foreign	27,05	14,66	41,71	30,75	27,53	18,08	9,45	1,52
Jews work more evil tricks than others.	53,81	18,04	71,85	19,23	8,91	5,89	3,02	8,06
Supreme aim of politics: to give Germany its rightful power and validity.	30,71	15,68	46,39	30,03	23,58	17,11	6,47	1,97
There are valuable and unvaluable lives.	60,45	11,89	72,34	17,98	9,69	6,03	3,66	7,47
The FRG is dangerously alienated by foreigners.	22,69	15,85	38,54	24,83	36,63	18,81	17,82	1,05
Jews have their own peculiarities and do not fit in with us.	55,55	15,78	71,33	19,79	8,89	5,46	3,43	8,02
National Socialism also had its good sides.	61,54	15,69	77,23	16,81	5,96	3,63	2,33	12,96

Source: Decker et al., 2023 (Table 8 in the appendix)

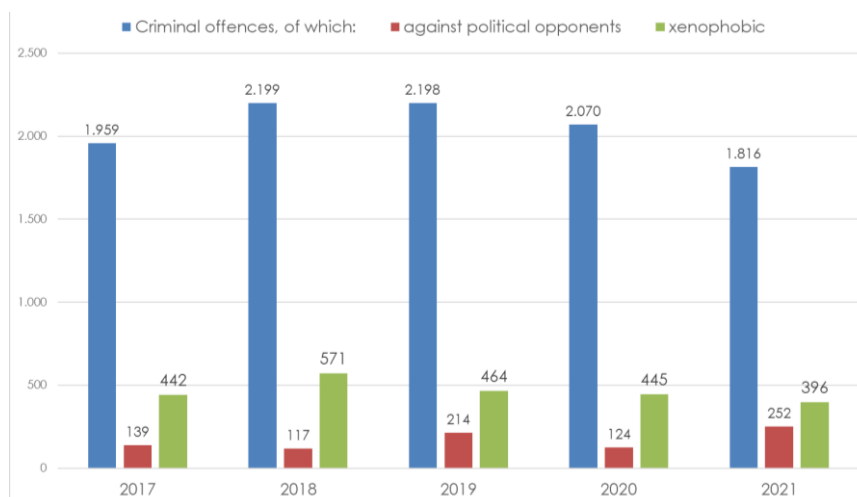
Note: The columns of the table in blue are extensions made by the author.

## The sober picture of the Saxon Report on the protection of the Constitution and of the Federal Crime Statistics

But when and how often does the manifest xenophobia identified by the Leipzig researchers turn to crime? Regarding hate crime (Haßkriminalität) and politically motivated violent crime nationwide, the Federal Criminal Police Office lists 41,177 offences for 2019 (2,832 violent offences), of which 22,342 were right-wing extremist (986 violent offences) (Bundeskriminalamt, 2023).

For Saxony 2022, the Saxon Report on the Protection of the Constitution 2022 of 6 June 2023 cites a figure of 1,709 right-wing extremist offences in total (including 58 violent offences), of which 97 were against [left-wing extremist] political opponents (18 violent offences) and 394 xenophobic offences (33 violent offences) (Landesamt für Verfassungsschutz Sachsen, 2023). Compared to 2018, when there were 571 offences, the latter have decreased numerically by around a third (Landesamt für Verfassungsschutz Sachsen, 2023). The 96 violent offences included, however, “as particularly serious, two suspected politically motivated arson attacks on asylum seeker accommodation in Bautzen and Leipzig” (Landesamt für Verfassungsschutz Sachsen, 2023). The district of Görlitz accounted for 88 right-wing extremist offences, 1 act of violence against political opponents, 0 xenophobic acts of violence (Landesamt für Verfassungsschutz Sachsen, 2023).

Fig. 14: Right-wing extremist offences in Saxony 2017 - 2022



Source: SMI, 2023, p. 91. (The graph was created by the author)

On the other side of the political spectrum in Saxony were 742 left-wing extremist offences in total and 174 violent offences, of which 5 (0 violent offences) in the district of Görlitz (Landesamt für Verfassungsschutz Sachsen, 2023).

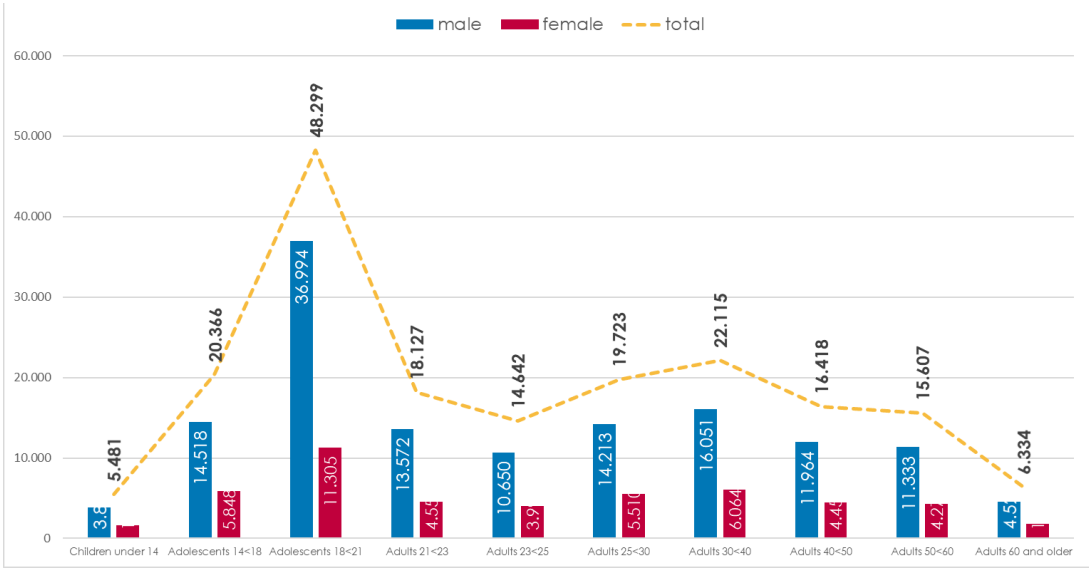
Islamism as well as “security-threatening and extremist aspirations of groups with a foreign connection” (Saxony 2022: 24 offences of foreign ideology, 4 violent offences of foreign ideology, 7 offences of religious ideology and 0 violent offences of religious ideology (Landesamt für Verfassungsschutz Sachsen 2023) were not noted by the Office for the Protection of the Constitution for the district of Görlitz.

Conversely, in the police crime statistics of the federal government there is a significantly higher proportion of foreign offenders than the proportion of foreigners in the resident population (13.1 %) (Bundeskriminalamt, 2023). Excluding the 222,021 offences under key 725000 (offences against the Residence Act, the Asylum Act and the Freedom of Movement Act/EU), which cannot be committed by German citizens (frequency figure 269 cases per 100,000 inhabitants), and only in relation to the further 1,921,553 suspects for the 5,402,755 recorded cases (frequency figure 6,432 cases per 100,000 inhabitants), the proportion of foreign criminals is 31.9 %. In several areas of crime it exceeds 70 % (Bundeskriminalamt, 2023).

A typical error in the German discussion on foreigner delinquency is the inadmissible transfer of the age-, gender-, and income-specific delinquency among the 1,108,127 German suspects to the 783,876 non-German suspects in Germany 2021 (Bundeskriminalamt, 2023). Among German suspects, there is a clear peak among adolescents 18-20 years of age with almost 50,000 suspects per cohort, and from 21 years of age onwards there is a continuity of 20,000 suspects per cohort until almost retirement age (Bundeskriminalamt, 2023).

Among the German suspects, women (with a population share of 50.7 %) make up 27.3 %, i.e. a good quarter. Among non-German suspects, women (with a population share of 47.3 %) make up 21.7 %, i.e. a good fifth or considerably less than among Germans (Bundeskriminalamt, 2023).

Fig. 15: Age- and gender-specific delinquency Germany 2021 among the 1,108,127 German suspects

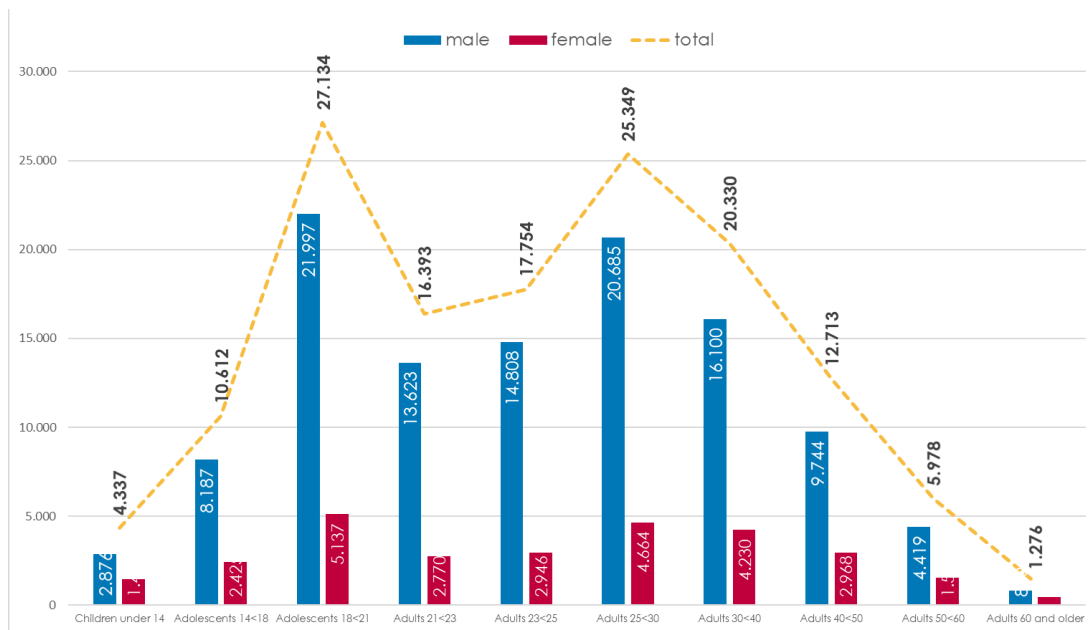


Source Data: Bundeskriminalamt, 2023  
 (The calculation and the graph were prepared by the author)

Among non-German suspects, there is a much less pronounced peak among adolescents 18-20 years of age with 27,000 suspects per year, but a second peak 25-29 years of age (Bundeskriminalamt, 2023). Above all, however, year after year the absolute numbers of cases from the age of 23 (here the sum is 619,389 from 23-59 or almost five times as much as juvenile crime) are almost on a par with the absolute numbers of cases among German suspects, despite a disproportionately smaller resident population <sup>1</sup> (Bundeskriminalamt, 2023). A much bigger problem than non-German juvenile delinquency is non-German adult delinquency by segments of the population that are not or not sufficiently integrated. Two problems overlap here. Firstly, large cities with more than 100,000 inhabitants account for only one third of the German resident population, but for 52.5 % of all suspects in the police statistics. Secondly, the large cities account for 70.6 % of all non-German suspects, and for women the figure is 90.0 % (Bundeskriminalamt, 2023). In terms of crime demographics, the living conditions in Germany's medium-sized and small towns are clearly different, and can be compared to those in the large cities only to a limited extent.

<sup>1</sup> Here the total is 738,312 from 23-59 years or three times as much as youth crime.

Fig. 16: Age- and gender-specific delinquency Germany 2021 among the 783,876 non-German suspects according to individual years summarised in age cohorts



Source: Bundeskriminalamt, 2023 (The graph was created by the author)

For the district of Görlitz 2022, the Federal Criminal Police Office reports a frequency ten times higher than the national average for violations of the Residence Act, the Asylum Act and the Freedom of Movement Act (frequency ratio 2,446 to 269), which is due to the border location (Bundeskriminalamt, 2023). For all other offence days, the frequency figure of 6,453 cases is exactly in line with the national average. However, as Anton Sterbling (2006) has repeatedly investigated, the “subjective security” of the citizens of Görlitz is below average; their complaints are manifest. In line with the comparatively low density of foreigners in the district, the proportion of non-German suspects is 25.7 %, i.e. below the national average.

Many cases are strongly perceived by the media and in discussions. This is especially true for the 75.6 % share of foreigners among the suspects in car thefts and the 50 % in robberies in flats (Bundeskriminalamt, 2023). Right up to the formulation of the CDU mayor Octavian Ursu (after a night-time attack by a group of presumably twelve Syrian, Turkish, Iraqi and Lebanese men aged between 19 and 35 on 10.07.2023 on celebrating high school graduates, three of whom had to be admitted to the hospital emergency room): The attackers had “forfeited their right of hospitality with us.” (Sächsische Zeitung Görlitz, 2023).

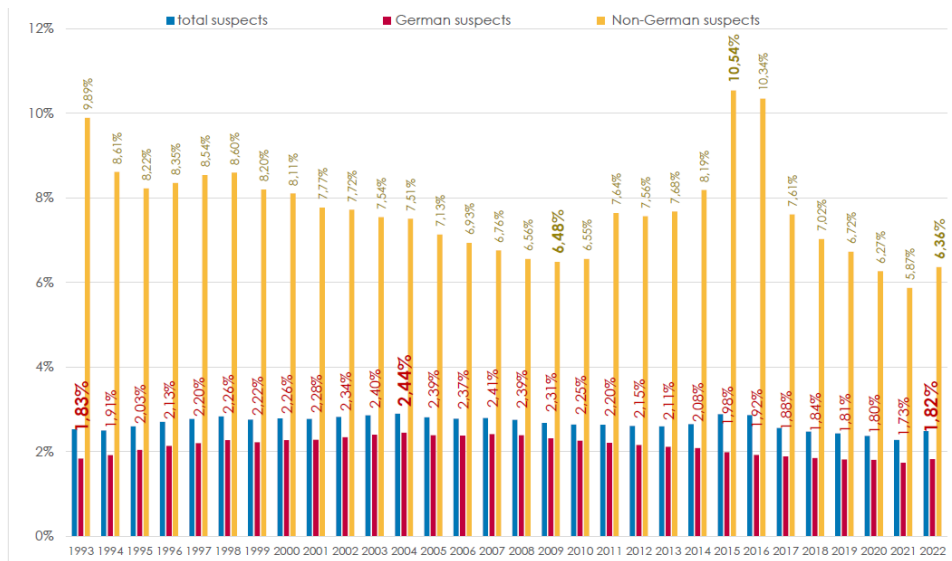
Typical for Görlitz, however, is the reaction to a xenophobe statement by the department stores' investor Winfried Stöcker. In an interview, the entrepreneur spoke of “Africans who like to travel” and had cancelled a benefit concert at the construction site of his historic Art Nouveau department stores' with the reason: “I do not welcome so many foreign refugees” (Sächsische Zeitung, 2014). Already the following day, the city administration, trade unions, churches, associations, numerous citizens gathered in the neighbouring Frauenkirche for a committed protest that was noticed nationwide (Spiegel, 2014). In

the same spirit, the city administration leads a decidedly foreigner-open “Welcome Alliance Görlitz”.

In sum, it should be noted that the 2022 crime statistics for Görlitz do not list a single assault against foreigners with xenophobic motives. The study by Decker et al. (2023) is important for many aspects. But it does not differentiate regionally in its socio-economic categories between large cities such as Leipzig, with its indeed high potential danger, and the comparatively tranquil situation in medium-sized towns such as Görlitz. It must always be borne in mind that the crime statistics are incomplete per se. There is the famous "dark field", which is an estimated number of unreported cases of xenophobic attacks, also in the city of Görlitz. However, these rarely lead to a report, partly because of mistrust of the police as an institution, partly because the perpetrators belong to the environment or are unknown, or simply because the effort for people with a migration background is connected with a high hurdle. The dark field cannot be recorded statistically; however, the incidents seem to be significantly smaller than in other Saxon cities.

The most important fact from the Police Statistic is a clear shrinking of Delinquency over the last three decades. As to the holders of German passports, delinquency started at the beginning of reunification statistic 1993 at 1.83 % share of pipublication suspected to have committed a crime. I was 2022 at 1.82 %. As to the holders of foreign passports, delinquency statistics started at 9,8 % in 1993, went down to 6.48 % in 2009, climbed to 10,5 % during the asylum seekers crisis 2015, and is now at 6.36 % (data compiled from Bundeskriminalamt, 2023 and Statistisches Bundesamt, 2023). Such a stability on deep level for the German side, and an important shrinking for the foreign side, is hardly communicated through politics and media. But communicating it would be important for the subjective security of citizens.

Fig. 17: Delinquency in relation to the size of the population group Germany 1993-2022



Source: Bundeskriminalamt, 2023; Statistisches Bundesamt, 2023  
 (The calculation and the graph were prepared by the author)

## Proportion of foreigners in the city of Görlitz

According to objective data, the city of Görlitz is the municipality in the Free State of Saxony with the highest proportion of foreigners, clearly ahead of the city of Leipzig. At the end of 2021 (currently the most recent official statistics), the proportion of non-German nationals was 12.3 % (Statistisches Landesamt Sachsen, 2023) they were distributed substantially among 21 official languages of origin (Stadt Görlitz, 2022).

Fig. 18: Population of Görlitz by official languages of countries of origin 2017 to 2021

	Official language		2017	2018	2019	2020	2021
		Total population	56 172	56 242	56 068	55 872	55 534
		non-German population	5838	6102	6191	6561	6825
			10,39%	10,85%	11,04%	11,74%	12,29%
1	German	German population	50 334	50 140	49 877	49 311	48 709
	German	Austria	24	30	34	33	33
2	Europe- EU	Poland	3506	3854	4005	4407	4713
7	Europe- EU	Czech Republic	96	94	69	83	74
8	Europe- EU	Italy	62	59	62	65	71
11	Europe- EU	Romania	129	113	81	75	67
12	Europe- EU	Greece	39	37	40	44	40
13	Europe- EU	Bulgaria	34	35	33	43	37
14	Europe- EU	Hungary	25	28	33	32	35
16	Europe- EU	Slovakia	29	30	30	29	27
18	Europe- EU	France	28	33	23	22	22
5	Europe- Non-EU	Russian Federation	103	95	110	109	99
6	Europe- Non-EU	Ukraine	60	66	73	82	80
9	Europe- Non-EU	Turkey	50	59	62	61	69
17	Europe- Non-EU	Georgia	12	22	32	29	26
19	Europe- Non-EU	Albania	42	27	23	21	21
	Africa	Libya	34	42	49	49	30
20	Africa	Eritrea	9	18	20	22	11
	America	United States	25	26	35	30	30
	Asia	Syria	756	704	644	587	538
	Asia	Iraq	81	50	42	40	47
4	Asia	Afghanistan	131	114	128	132	130
10	Asia	Vietnam	61	64	66	67	68
	Asia	India	27	25	22	21	30
21	Asia	Japan	20	23	32	24	10
		Other countries of origin	455	454	443	454	517

Source: Stadt Görlitz, 2022 (The table was created by the author)

Just as the city of Görlitz was among the municipalities in Saxony, the county of Görlitz (Landkreis), for its part, was at the top of the Saxon counties and ahead of the state average in terms of the proportion of foreign population as of 31 December 2021 (Statistisches Landesamt Sachsen, 2023).

Fig. 19: Foreign population in the Free State of Saxony on 31 December 2021 by county-free cities and counties, and citizenship

County-free City County Country	Population	Foreign population	Share of foreign population in population	Europe as a whole	Europe: EU states	Europe: non-EU states	Africa	America	Asia	Australia/ Oceania, Other	Other countries of origin
<b>Görlitz, City</b>	<b>55.534</b>	<b>6.825</b>	<b>12,29%</b>	<b>5.414</b>	<b>5.119</b>	<b>295</b>	<b>41</b>	<b>30</b>	<b>823</b>	<b>n.d.</b>	<b>517</b>
Leipzig, City	601.866	63.335	10,52%	29.620	17.920	11.700	4.395	3.560	24.390	1.365	
Chemnitz, City	243.105	25.245	10,38%	10.495	6.550	3.940	1.615	740	11.825	570	
Dresden, City	555.351	50.950	9,17%	22.630	14.235	8.400	3.345	2.450	21.170	1.350	
Görlitz, County	248.273	17.825	7,18%	12.985	9.105	3.880	410	330	3.910	190	
<b>Free State of Saxony</b>	<b>4.043.002</b>	<b>244.415</b>	<b>6,05%</b>	<b>124.955</b>	<b>82.575</b>	<b>42.380</b>	<b>15.065</b>	<b>9.605</b>	<b>89.805</b>	<b>4.985</b>	
Nordsachsen, County	197.529	9.485	4,80%	6.240	4.835	1.410	500	185	2.395	165	
Vogtlandkreis, County	221.376	9.990	4,51%	5.710	4.190	1.520	615	235	3.245	180	
Zwickau, County	309.621	13.730	4,43%	7.200	5.285	1.910	775	305	5.200	250	
Saxon. Switzerland-	244.009	9.585	3,93%	5.835	3.270	2.565	485	260	2.875	140	
Mittelsachsen, county	299.329	11.505	3,84%	5.975	4.310	1.665	895	460	4.010	165	
Meißen, County	239.344	8.700	3,63%	5.085	3.780	1.305	465	300	2.680	170	
Leipzig, County	258.214	8.135	3,15%	4.555	3.115	1.440	545	300	2.590	145	
Bautzen, County	296.290	8.190	2,76%	4.825	3.485	1.340	380	245	2.610	130	
Erzgebirgskreis, County	328.695	7.740	2,35%	3.810	2.505	1.305	640	225	2.895	170	

Source: Statistisches Landesamt Sachsen, 2023 (The table was created by the author)

Only the proportion of African and American countries of origin within the foreigner cohorts was smaller than the Saxon average, significantly higher for the EU, the remaining European and the Asian cohorts.

Fig. 20: Foreign population Free State of Saxony, City of Görlitz, County of Görlitz on 31 December 2021 by nationality

	Total population	Total foreign population	Proportion of foreign population	Europe: total	Europe: EU states	Europe: non- EU states	Africa	America	Asia	Australia / Oceania, Other
<b>1. Free State of Saxony</b>	<b>4043 002</b>	<b>244 415</b>	<b>6,05%</b>	<b>124 955</b>	<b>82 575</b>	<b>42 380</b>	<b>15 065</b>	<b>9 605</b>	<b>89 805</b>	<b>4 985</b>
Shares according to continents		100,00%		51,12%	33,78%	17,34%	6,16%	3,93%	36,74%	2,04%
<b>2. city of Görlitz</b>	<b>55 534</b>	<b>6 825</b>	<b>12,29%</b>	<b>5 414</b>	<b>5 119</b>	<b>295</b>	<b>41</b>	<b>30</b>	<b>823</b>	<b>n.d.</b>
Shares by continent		100,00%		79,33%	75,00%	4,32%	0,60%	0,44%	12,06%	
Difference GR/SXN Shares by cont.				28,20%	41,22%	-13,02%	-5,56%	-3,49%	-24,68%	
<b>City-GR shares in SXN</b>	<b>1,37%</b>	<b>2,79%</b>		<b>4,33%</b>	<b>6,20%</b>	<b>0,70%</b>	<b>0,27%</b>	<b>0,31%</b>	<b>0,92%</b>	<b>n.d.</b>
Share foreign population according to	0,00%	1,42%		2,96%	4,83%	-0,68%	-1,10%	-1,06%	-0,46%	n.d.
<b>3. County Görlitz</b>	<b>248 273</b>	<b>17 825</b>	<b>7,18%</b>	<b>12 985</b>	<b>9 105</b>	<b>3 880</b>	<b>410</b>	<b>330</b>	<b>3 910</b>	<b>190</b>
Shares by continent		100,00%		72,85%	51,08%	21,77%	2,30%	1,85%	21,94%	1,07%
Difference county-GR/SXN Shares by cont.				40,73%	23,39%	6,95%	-4,23%	-6,46%	26,35%	-8,35%
<b>Shares of population LK-GR in SX</b>	<b>6,14%</b>	<b>7,29%</b>		<b>10,39%</b>	<b>11,03%</b>	<b>9,16%</b>	<b>2,72%</b>	<b>3,44%</b>	<b>4,35%</b>	<b>3,81%</b>
Share foreign population according to	0,00%	1,15%		-40,73%	-22,76%	-8,18%	-3,44%	-0,49%	-32,39%	1,77%

Source: Statistisches Landesamt Sachsen, 2023 (The calculation and the table were prepared by the author)

The Russian war of aggression on Ukraine on 24.02.2022 has greatly changed the situation. The two cities of Görlitz and Zgorzelec and particularly their populations provide cross-border assistance (Malzahn, 2022). Accordingly, the county of Görlitz is among the counties disproportionately involved in refugee issues, which are listed in the statistics of the Saxon State Ministry of the Interior forwarded to the Saxon State Parliament and published under Drs.-Nr. 7/12826 (Sächsischer Landtag, 2023).



Fig. 21: Refugees in the districts and independent cities in the Free State of Saxony

Competent authority	Total persons covered by SMI statistics		Population		Difference between statistical share and population share	Persons in asylum procedure	Total
Saxony total (according to AZR)	116.733	100,00%	4.043.002	100,00%		12.602	
Leipzig, city	23.998	21,49%	601.866	14,89%	6,61%	1.212	16.767
Dresden, city	19.469	17,44%	555.351	13,74%	3,70%	1.438	14.764
Chemnitz, city	10.657	9,54%	243.105	6,01%	3,53%	749	6.589
Zwickau, county	8.069	7,23%	309.621	7,66%	-0,43%	792	4.264
Görlitz, county	6.077	5,44%	248.273	6,14%	-0,70%	683	1.270
Vogtlandkreis, County	6.040	5,41%	221.376	5,48%	-0,07%	603	3.413
Mittelsachsen, County	6.002	5,38%	299.329	7,40%	-2,03%	817	1.406
Bautzen, County	5.725	5,13%	296.290	7,33%	-2,20%	646	3.595
Meißen, County	5.673	5,08%	239.344	5,92%	-0,84%	572	3.462
Leipzig, County	5.260	4,71%	258.214	6,39%	-1,68%	569	3.133
Erzgebirgskreis, County	5.241	4,69%	328.695	8,13%	-3,44%	721	2.095
Sachs. Schweiz-Osterzgebirge County	5.240	4,69%	244.009	6,04%	-1,34%	642	2.969
North Saxony, County	4.207	3,77%	197.529	4,89%	-1,12%	407	2.061
Central Foreigners Authority Saxony Regional Directorate	4.456					2.745	15
not under the jurisdiction of Saxon foreigners authorities	619					6	1

Source: Sächsischer Landtag, 2023 (Editing: author)

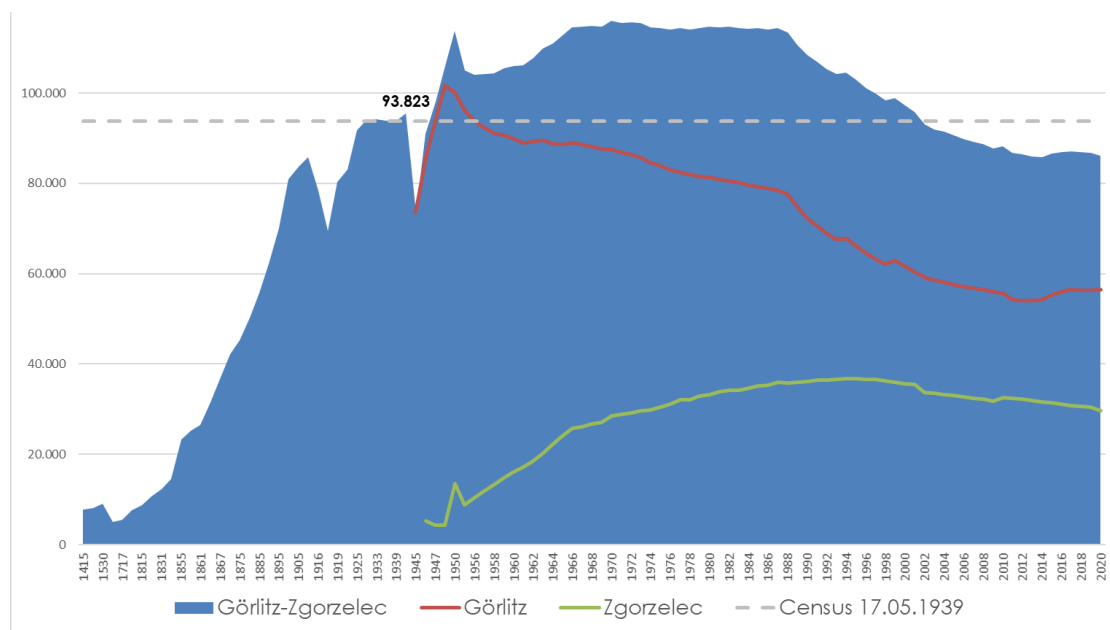
In the German-speaking and even more so in the non-German-speaking media image of the city of Görlitz, this high proportion of foreigners and this high willingness to help refugees have so far left hardly any traces, while the electoral successes of the AfD in East Saxony are strongly noted.

### Summary of background research data

Görlitz–like all cities in this world–is not a paradise. However, according to the facts, it is excellently suited for the planned Voluntary Year of Care, as it is the city in Saxony with the highest number of foreigners, even before Leipzig. At the end of 2021 (currently the most recent official statistics), the proportion of non-German nationals was 12.29 % (Statistisches Landesamt Sachsen, 2023). They were distributed substantially among 21 official languages of origin (Stadt Görlitz, 2022). As the European City of Görlitz-Zgorzelec, the urban community is already bilingual in everyday life. Our study for the population proportions within the German part of the city (Vogt, 2021) showed that the population could be divided (ironically exaggerated) into “Germans, Poles and foreigners”; for a reprint of our graph on the labour force in the hospital see Ritter in this volume.

The isolated view of shrinkage processes after 1950 within the German part of the city obscures the view of the simultaneous growth of Zgorzelec, which had begun to grow in 1945 with a population of almost zero. The German and Polish cities together reach almost 100,000 inhabitants and are thus statistically almost a de facto large-size city; the pre-war figure in the last census on both sides of the Neisse River was 93,823 inhabitants as of 1 May 1939 (Vogt, 2007; Vogt, 2021). This is also the order of magnitude today. Shortly before 8 May 1945, the German Wehrmacht blew up all the bridges over the Neisse, a symbolic anticipation of what happened at the end of the war: the city of Görlitz, which until then lay on both banks of the Neisse, was split into an eastern Polish and a western German part, into “Zgorzelec” and the now much smaller “Görlitz”.

Fig. 22: Demographic data Görlitz-Zgorzelec 1415–1939–2020



Source: Vogt 2007, p.137; Vogt, 2021, p.174.

In integrating foreigners, Görlitz is exemplary in many respects - currently as the German 'capital' of Ukraine-friendliness (Malzahn, 2022). When citizenship, trade unions, politics, churches clearly agree on discrimination against xenophobia (cf. the Stöcker case 2014), this is to be understood as a normative act, which is characterised by responsibility for the external image and future of the city society, not by a historical-critical analysis. The historical development path of the city of Görlitz repeatedly experienced exclusions typical of the times; for example, the persecution of Jews in the late Middle Ages; the exclusion of Catholics from political participation since the Reformation, which was only stopped by Prussia in 1815; the Protestant defamation of the Croatian cavalry in the Thirty Years' War, which reverberated for centuries (Gustav Adolf of Sweden: "the devil's new nobility"; quoted after Guldescu, 1970); the "Polacks" and the "yellow peril" in the Empire. Ethnic and political exclusions reached their peak not only under National Socialism rule, but as well under SED rule. In this respect, Articles 1 to 19 of the Grundgesetz (German Constitution) represent a break with several recent lines of tradition in the city's history, which at the same time and for centuries has been characterised by a high degree of social welfare.

In turn, post-1990 emigration affected the mobile and educated classes in particular, as did post-1990 immigration. This is directly reflected in the at-risk-of-poverty rate of 12.5% (2019), measured against the national median in Saxony, and here again especially in the qualification level of the main income earner in the household: low (ISCED 0 to 2) 45.8%; medium (ISCED 3 and 4) 13.3%, high (ISCED 5 and higher) 5.0% (Statistisches Landesamt Sachsen, 2023). Those lagging behind and at risk of long-term unemployment and of poverty are especially the less educated with the corresponding resentment. Surprisingly, the Saxon Social Report 2022 shows significantly lower old-age poverty for the group of pensioners than in Germany as a whole, with 7.9 % in Görlitz (SMS, 2022). This

does not change the subjective transformation overload of considerable parts of the population, which is then countered on the one hand by the articulate citizens, trade unions, politics, and churches with their normative acts, and on the other hand is flattered populistically with homogeneity fantasies.

But Görlitz is also the city in the former GDR that was the only one to succeed in deposing the mayor and freeing the political prisoners during the popular uprising on 17 June 1953. The protagonists were the expellees from Silesia who had been denied integration and the vainly hoped-for return eight long years after the war. The refusal of integration by the old-established, even against equal speakers from other parts of the country, and the demands to endure the corresponding frictions, this is one of the constants of human history worldwide and requires constant attention. A typical example from Görlitz is a Romanian trumpet player who got a job at the Görlitz theatre, found his great love there in the choir, and gained recognition among the theatre staff by being elected chairman of the works council. After his successful work in the Saxon state parliament, all democratic forces and also the Left Party joined forces to elect him in the second ballot as the current Lord Mayor. However, a third of the CDU voters in the first ballot voted for the AfD candidate in the second; accordingly, the outcome was close (Statistisches Landesamt Sachsen, 2019). With 40 % population change after 1945 (the complete population exchange on the eastern bank in Zgorzelec combined with the large population exchange on the western bank in "Görlitz"), the European City of Görlitz-Zgorzelec is singular in the Federal Republic in successfully mastering the challenge of mediating between old residents and newcomers and creating a common new home through joint achievement.

Despite all the statistically relevant factors in favour of intercultural training of non-European care workers, the subjective resentments of local residents must be taken seriously and countered. Enduring verbal slips is part of everyday life in Saxony even for the not insignificant group of West Germans; there may be also some kind of 'intracontinental racism'. Only when such reservations can be overcome by people acting in everyday life will the project have a real chance on a small scale and the city have a future on a large scale.

It is the task of research, to soberly record the number of verbal and non-verbal attacks, to put them in relation to the situation in other German and European cities and to transport the results (socially) through the media). Whether the project "Managing difference" will succeed in working on the further opening of urban society with the means of artistic workshops and other forms, only time will tell. With its research volume "Ankommen in der deutschen Lebenswelt" (Vogt et al., 2016), the Saxonian Institute for Cultural Infrastructure has pointed out the enormous possibilities of a successful enculturation, which—unlike assimilation—enables the newcomers to gain a foothold in the new homeland without losing the old one from their hearts and minds.

## Research to be carried out

### Aim of the research

The objective of the research is, firstly, to establish a stable observatory for nursing care in Saxony-Lower Silesia-Northeast Bohemia, which can remain active beyond the project period and which provides the actors with forecasts for the respective political, training, further education and communication needs in the field of nursing care via an uncomplicated reporting system. The quite different understanding of care as well as the quite different organisation of care in Germany, Poland, Czech Republic as well as in Cameroon and Mongolia offer the opportunity for fundamental investigations on the optimisation of the current care systems in Germany, Poland and Czech Republic, as well as in the regions of origin of the candidates.

Secondly, the aim of the research is to develop guidelines for the successful enculturation of foreign, in particular non-European, care workers into the care systems of Germany, Poland and the Czech Republic, which are already equipped with a sufficient evaluation system and can be used by the providers of care facilities.

The objective of the research is, thirdly, to develop a multilingual digital dictionary that can be consulted by doctors and nurses during work. The success of 'arriving' depends on the reliability of nursing protocols and intra-hospital reporting. The dictionary should include the three language levels respectively (a) medical lexis and jargon, (b) High German terms, (c) colloquial and dialectal terms, namely (1) for German, (2) French and (3) English, as well as (4) the language levels also from the regions of origin of the Görlitz trainees, among others Bamiliké (Cameroon), Mongolian, Polish.

The aim of the research on the theoretical level is to create recommendations and guidelines for the successful enculturation of foreign, especially non-European, skilled workers into the economic systems of Germany, Poland and the Czech Republic. To this end, a basic theory is to be developed on an international scale in continuation of the "Ankommen" study (Vogt et al. 2016).

### Expectation management: Locals

Based on a sentence by the former Africa envoy of the German Chancellor, Günter Nooke (Nooke et al. 2018), the three groups of people to be researched can be listed under the heading of "expectation management". A divergence between inflated expectations - whether among the incomers, the residents or within the work teams - and reality leads to frustration and conflicts.

It is the task of politics to make clear to the native population the consequences of demographic change for themselves and for their family members. It is known from dementia research that intra-family care lies mainly with the daughters, who in turn are affected to a large extent by caregiver stress syndrome (BfArM, 2020). A preliminary study presented by the Technical University of Liberec in June 2023 (Böhm, 2023) showed that a significant proportion of those who will have to be cared for in the future prefer to grow old in a home in order to spare their own family.

It is the task of the research to gather as empirically evident a picture as possible of the stereotypes of the locals and the possible process of change in this respect. When comparing the cohorts from Görlitz with the cohorts from Wrocław and Liberec, the studies on subjective security by Anton Sterbling et al. (2006) can be followed up. The instrument of artistic workshops for recording stereotypes is new in European migration research.

### **Expectation management: Care teams**

The crucial group for the success of the arrival as care workers are the care teams (so far consisting almost exclusively of locals). Here the first connections have already been made, so that there is a good chance that the nurses will actively participate in shaping the Intercultural Year of Nursing; the candidates will become their 'apprentices' and they themselves will become instructors for the enculturation of the candidates into the teams.

The task of research is to actively accompany these processes and to record the situation at the other clinics and homes in the study area within the framework of the observatory.

Research cannot by itself contribute to strengthening intercultural resilience. But it can contribute significantly to the public discussion by reflecting on risks and opportunities.

The care teams are particularly typical representatives of an urban society and in Görlitz have so far been almost entirely domestic, with only a few Poles (Vogt, 2021). The extent to which the model project and the workshops 2024-2027 actually succeed or fail in achieving an appropriate "Managing differences" among them is a meaningful practical continuation of the theoretical-sociological studies.

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*Monique Ritter*

*NURSING SHORTAGE AND MIGRATION: INSIGHTS INTO THE  
CURRENT SITUATION IN THE FEDERAL STATE OF SAXONY,  
GERMANY*

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**Abstract**

This paper summarises two qualitative studies that examined the issue of recruiting migrant workers for the healthcare sector in the Federal State of Saxony, Germany. Given the shortage of skilled nursing staff, investigations were conducted to understand the situations and conditions that migrant caregivers are likely to encounter when working in the nursing and care work sectors in Dresden and in the district of Görlitz. These regions were characterised by sparse migrant populations and limited intercultural collaboration at the workplace until 2014/2015, when they witnessed an influx of refugees. To gather relevant data on the issue, problem-focused interviews were conducted with a number of white, German actors engaged in older people's care and in hospitals. A grounded theory-based approach and content analysis were used to analyse the responses. Findings highlighted the presence of racism in exchanges with migrant caregivers. Further, in a field of labour governed by economic constraints, racist practices fostered exclusions, especially when time and human resources were not invested in promoting teamwork. Thus, the working conditions of migrant caregivers can be potentially regarded as precarious, problematic and in need of anti-racist and employee-friendly practices. This work addresses a research gap by examining an issue that is relevant to labour sociology and nursing science in Germany from an anti-racist perspective while analysing specific working conditions. It also offers recommendations for a more promising collaboration that are based on the findings.

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*Keywords: immigration; racism; nursing*

**Introduction**

The population in the European Union (EU) is ageing rapidly. Across the EU, on average, people older than 65 years account for 20.3% of EU's population (measured in 2019; Grubanov Boskovic et al., 2021). According to a recent report by the EU Commission, a shortage of 11 million caregivers is anticipated across Europe by 2030 to meet the increasing demands for nursing and elder care (Grubanov Boskovic et al., 2021). With 21.5% people aged 65 or above, Germany has one of the oldest populations within the EU (Grubanov Boskovic et al., 2021, p. 31). Demographic changes, the implementation of long-term care insurance in 1995/1996 and the subsequent working conditions characterised by economic pressures have led to a particularly acute shortage of skilled workers in nursing and older persons' care in Germany. Given these developments and the lack of successful labour market policy measures (e.g. retraining and continuing professional education of helpers), migration and associated recruitment measures play an increasingly



important role in addressing nursing and elder care needs, thereby ensuring the provision of general interest services.

### **Federal level**

The Federal Employment Agency (BA) located in Nürnberg has increasingly come to rely on immigrant workers (Bundesagentur für Arbeit, 2022). Since 2016, the number of non-EU nursing staff employed in Germany has increased by 29,000 to reach a total of 88,000, as a result of the European freedom of movement (Bundesagentur für Arbeit, 2022, p. 10). In 2021, 13% of the statistically recorded nursing staff nationwide came from EU and non-EU countries (this figure was still 7% in 2016), and it included a high number of people with flight experience referring to the increased refugee influx from African and West Asian regions post-2014-15 (Bundesagentur für Arbeit, 2022, p. 10). The Immigration Act, introduced in Germany in March 2020, has also created new prospects for skilled workers, particularly from non-EU countries, thus facilitating the immigration of non-EU workers in the care context.

### **State level**

The Federal state of Saxony has one of the oldest populations in Germany on average (care rate of 7.7%; Statistisches Bundesamt, 2023). Consequently, the shortage of skilled workers in the elder care and nursing sector is considered particularly problematic in the region. In 2017, for every 100 registered nursing positions in the sector, only 14 'unemployed' candidates were available (Fuchs et al., 2018, p. 31). At the same time, the share of the so-called foreigners in Saxony's total population was – and continues to be – low. In the state capital Dresden, migrants accounted for 4.7% of the population in 2013 (Landeshauptstadt Dresden Kommunale Statistikstelle, 2013, p. 6), whereas in the more peripheral rural district of Görlitz, it was 3.5% in 2015 (Landratsamt Görlitz, 2017). It was only with the increased influx of refugees from the Global South after 2014/2015, including predominantly Black and/or Muslim people, that the proportion of immigrants increased to 9.1% in 2021 in Dresden (in 2021; Landeshauptstadt Dresden Kommunale Statistikstelle, 2023) and to 4.5% in Görlitz district in 2018 (Landkreis Görlitz, 2018).

Taking these facts into account, this paper examines the level of cooperation between white, German and migrant caregivers, particularly Black and Muslim caregivers, in the context of nursing and elder care. Although the research on which this paper is based was initially guided by an open-field approach and inductive category formation, it gradually adopted an anti-racist or critical race theory framework based on a precise analysis of the empirical phenomena.

### **Critical Race Theory**

In this paper, racism is not seen as an individual fact or mechanism. Instead, it is highly effective in shaping contexts or structural principles of social reality that refer to general patterns of differentiation between people, and it operates at different levels of social reality (e.g. laws, institutions, everyday interactions, individual self-understanding; Scharathow et al., 2011, p. 10). Thus, racism forms a powerful system of discourses and

practices operating with or connected to racial constructions. It makes inequalities and hegemonic power relations firstly effective and secondly plausible (Mecheril & Melter, 2011, pp. 15-16). These dynamics are pervasive at the everyday level (Essed, 1991) and linked to repressed, colonial imaginaries (Friese, 2021, p. 127) that have 'flowed' through time. In everyday life, they are continuously actualised and reliably available as a frame of interpretation (see e.g. Fanon, 2001; Hall, 1997). Since its emergence, (colonial) racism, and thus colonialist aspirations, have been closely tied to the global spread of capitalism. A comprehensive understanding of racist exclusionary practices is strongly associated with historical materialistically informed perspectives (e.g. Hall, 1980; Miles & Brown, 1989); even contemporary 'race' relations are understood as entangled with economic processes.

Drawing on this theoretical framework two studies were conducted – one in the city of Dresden and one in the district of Görlitz, whose research design and results are presented below. Finally, an overall assessment of the current conditions of cooperation and its implications are presented.

## **Study 1: 'I am actually open-minded, but...' – the context of domiciliary care in the city of Dresden**

### **Background**

In view of the increased refugee immigration since 2014/2015 and the national trend of attracting migrants for care professions, I examined the cooperation conditions in domiciliary care contexts in the city of Dresden. This study is part of my PhD dissertation research, which was conducted between 2018 and 2023 and funded by the European Social Fund and the institution 'Sächsische Aufbaubank', via a scholarship titled 'Landesinnovationsstipendium' (Ritter, 2020a, 2020b, 2021, 2022). Domiciliary care is an arrangement under which professional caregivers visit patients in their homes and provide nursing, intimate care and domestic help.

### **Methods**

In line with research studies based on grounded theory (Clarke et al., 2018; Strauss & Corbin, 1990), I conducted problem-centred interviews (PIs) (Witzel, 2000) with six, white care managers, caregivers, care recipients and 14 migrant caregivers. As a method, PI facilitates an unbiased recording of individual actions and subjective perceptions as well as ways of processing social reality (Witzel, 2000). To generate new knowledge inductively, the PI starts with an open-ended initial question and addresses, during the ongoing conversation, other aspects that the interviewees find relevant. In addition, the PI involves the use of – usually at the end of the interview – an interview guideline prepared by the interviewers to address certain topics that are of particular interest to the research and allow for greater comparability of the responses. In addition, I engaged in participant observation (Spradley, 1980) of daily care activities for over four weeks in three care facilities in order to become familiar with the work routines and logics. The collected data was fully transcribed and analysed using the theoretical coding strategies (open, axial and

selective) of Anselm Strauss and Juliet Corbin (1990). The data analysis was supplemented with elements from the literary critical analysis method of ‘close reading’, proposed by Barry Brummett (2010). This method aims at a critical analysis of socially shared patterns of interpretation that can be found in the language used, such as racist narratives, speech patterns, arguments and symbolic-rhetorical figures (tropes such as metaphors, irony and euphemisms; Brummett, 2010, pp. 8-9, 73-96).

During the field phase of the study, between 2018 and 2020, 115 outpatient care facilities were listed in the city of Dresden, and I contacted them by telephone. Responses from the care service managers’ revealed that only three care services permanently employed Black and/or Muslim caregivers. Targeted recruitment of people from non-EU countries for nursing training is still not established, despite the high shortage of nursing staff.

## Results

The entire research work was guided by the statement ‘I am actually open-minded, but...’. A few of the white, German interviewees opened their conversation with this statement and went on to share their thoughts on professional cooperation with migrant care workers. They primarily addressed hypothetical scenarios with Black and/or Muslim caregivers (hereafter referred to as Black and People of Colour (BPoC)) and not, for example, cooperation situations with caregivers from Eastern Europe, such as Poland or the Czech Republic, which can be regarded as established in the study area.

The phrase ‘I am actually open-minded, but...’ supposes openness and interest on the one hand, but at the same time signals a problematisation, discomfort and sense of contradiction with the idea of cooperation. In my PhD research, I focused on this ‘but’ or the discomfort of working together. Crucial to the understanding of this discomfort is (a) the (re)production of (colonial) racist knowledge by the interviewees and (b) a labour sector marked by high pressures of cost optimisation and/or profit maximisation.

Interestingly, in German-speaking countries, research that examines professional cooperation between white German workers and migrant workers from an anti-racist lens – while examining specific local and contextual working conditions – is lacking in the fields of both labour sociology (Huke & Schmidt, 2019) and nursing science. The issue of professional cooperation with migrants and refugees has been covered in research on politics and labour markets (see e.g. Bundesministerium für Wirtschaft und Energie, 2020; Büschel et al., 2018). The studies mainly address legal frameworks, language skills, integration offers, recognition issues or skill deficits among migrants (Huke, 2020). Racism or discrimination in the working context has hardly been addressed. This study, therefore, bridges an important gap.

Among the colonial legacies whose subtle impact I was able to reconstruct in my study are phantasms of laziness, dehumanisation, hypersexuality, impurity and criminality (Fanon, 2001; Hall, 1997). In the research field studied, these bodies of knowledge problematise collaboration with BPoC at the everyday work level, leading to avoidance of such collaboration and, on the part of migrant caregivers, to experiences of exclusion, rejection and devaluation.

The following interview excerpts<sup>1</sup> are intended to provide insights into the (re)production of the laziness topos:

They [BPoC] are actually used to smooth processes; surely, they are not under pressure in their home countries (Interviewee1 [nursing specialist], personal communication, 12/19/2018).

It's too much work for a foreigner, at least for one who doesn't come from the EU (Interviewee 1 [nursing specialist], personal communication, 02/02/2020).

On the other hand (pause), I can imagine with the migrants [BPoC], this may not be positive. I could well imagine him throwing up his hands [...] with care and in piecework [...], [and saying]: "I can't work like that, we are not used to so much work like that." (Interviewee2 [head of a care facility], personal communication, 07/18/2018)

These statements from the white, German interviewees clearly illustrate their concerns about BPoC being able to adopt established work routines in nursing and elder care. It should be mentioned here that neither the nursing specialist nor the head of the care facility had any experience in working with BPoC during their professional nursing careers. Thus, these attributions can be understood as social imaginaries that are linked to (colonial) racist knowledge. Not surprisingly, Black postcolonial theorists Frantz Fanon and Stuart Hall have criticised the supposed 'laziness of the black man' (Fanon, 2001, p. 294) or the alleged "'innate laziness" of blacks' (Hall, 1997, p. 244) as white constructions.

Thus, BPoC are denied the ability to endure a high degree of work pressure, time pressure, caring load, stressful experiences, or physical and psychological strain involved in the daily care for older people, which stem from the pressures of economisation (Slotala, 2011; Stagge, 2016; Theobald et al., 2013). Hence, they are rarely considered for professional collaboration. Further, the issue of established routines in older peoples' care does not seem to be questioned. In fact, a care service manager repeatedly spoke of these routines in a monotonous, system-uncritical manner:

[T]here is nothing else here in domiciliary care but piecework. [...] [W]e have thirty patients in some tours, and, of course, that goes one after the other. [The times for the various services] are given, and we have to cover our expenses. [And] everybody has to go along with it and accept it (Interviewee2 [head of a care facility], personal communication, 07/18/2018).

Once it is established that cost-cutting constraints and/or the expected level of profitability can no longer be maintained by working with BPoC, racist exclusionary practices (re)produce themselves.

It's all about the money, as usual. And what is more important for me? Hiring the foreigner [...] that will not work, and I might lose [...] several thousand euros [...] as

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<sup>1</sup> All direct interview quotes used in this paper were translated into English by the author.

a result? If I take the risk, the management is never behind me. They want to see numbers (Interviewee3 [head of a care facility], personal communication, 10/14/2019).

## Conclusions

The above interview excerpts provide insights into an exclusion-reinforcing relationship between racialisation and economisation in the context of older peoples' care. As a result of their colonial racist imaginaries, the interviewees feel threatened by an anticipated mode of operation that realises less surplus value or that endangers the usual profitability. In other words, the processes of racialisation serve to effectively reproduce the capitalist mode of production, pushing people into certain economic positions within the wage labour system or excluding them from the working population (Miles & Brown, 1989). Although there is a general tendency in Germany, and in the EU, to recruit migrants for unstable jobs affected by a shortage of labour, such as nursing and elder care, the current situation in Dresden is disparate. The more or less unconscious (re)production of everyday racism impedes professional cooperation with people identified as Black and Muslim, which in turn threatens cooperation in a labour sector subjected to economic constraints.

The following section offers a deeper insight into the prevalent scenario at the outskirts of the urban city where a targeted recruitment of people from non-EU countries for nursing training is absent, too: the district of Görlitz. In line with the understanding of racism presented above, interviewees at the hospital in Görlitz are to be considered as also being entangled in racist knowledge (Kalpaka & Rätzzel, 1986). As noted above, cost-saving constraints have been cited repeatedly by interviewees as the reasons problematising a collaboration with BPoC a priori.

## Study 2: 'This house has no resources' - District of Görlitz

### Background

Owing to demographic changes, a steady decline in population and the acute shortage of nursing staff in the rural area of Görlitz district (Staatsministerium für Wirtschaft, Arbeit und Verkehr, 2019, p. 19), the local hospital (hereinafter referred to as 'Klinikum Görlitz') intends to engage in targeted recruitment of people from non-EU countries for nursing training at the hospital's academy (hereinafter referred to as 'Krankenhausakademie'). These are considerations that arose in particular in response to an enquiry from the Institute for Cultural Infrastructure in Saxony (hereinafter referred to as 'Institut für kulturelle Infrastruktur Sachsen') about possible interest in such recruitment and an Institutes' process guidance.

Due to an already existing cooperation between this Institute and socio-political actors (e.g. mayors) in Bafoussam (West Cameroon), in the coming years, interested candidates from Bafoussam and the surrounding region would be able to pursue nursing training in Germany, which includes immigrating to Germany and training on site in Germany. If the

Klinikum Görlitz chooses to implement this recruitment, interested Cameroonians are expected to acquire the B2 language certificate, mandated by the Common European Framework of Reference for Languages as well as attend an introductory module in elder and nursing care and a course on intercultural issues in West Cameroon as part of their preparations. Efforts are also under way to recognise school certificates issued in Cameroon. Translated certificates of the candidates are to be sent to the management of the hospital's academy so that they can be forwarded to the corresponding state offices. Thus, starting in 2024, Cameroonians could pursue a three-year vocational training programme at the Krankenhausakademie in Görlitz (in a mixed class together with German students) and become healthcare and nursing professionals (Gesundheits- und Krankenpfleger/innen). The dual-mode training programme in Germany includes (a) classroom-based training at a vocational school (Krankenhausakademie), (b) practical sessions at the training centre (Klinikum Görlitz) and in other care contexts (domiciliary care services and care homes). The trainees must complete a high number of practice hours as part of the training in all those care contexts.

Klinikum Görlitz has no previous experience in organised recruitment of nursing staff from abroad. The majority of its employees are white and German, and the majority of its migrant employees come from Central and Eastern Europe (primarily Poland and the Czech Republic), after having applied for employment opportunities individually.

Supported by a grant from the Saxony State Directorate (Landesdirektion Sachsen) for the promotion of inter-regional, cross-border as well as international cooperation, the Institut für kulturelle Infrastruktur Sachsen commissioned me to conduct a one-month short (02/2023) survey before possibly launching the above-mentioned programme at the Klinikum Görlitz and the Krankenhausakademie. In view of my anti-racist research carried out in Dresden, the goal of the short study was to understand how the hospital and the training actors in Görlitz evaluate the project of recruiting Cameroonians. Further, the key question to be answered was 'What conditions must be created – based on the assessed perspectives – so that training and cooperation processes (can) succeed both within the school and at the various training wards in the programme.' It can be assumed that such a project calls for a (pro-)active anti-racist approach to integration and cooperation processes, employee-friendly working conditions and a clear understanding of 'good work' and 'good care', given that the nursing profession is subjected to severe economic constraints.

## Methods

To seek initial answers to these questions, I conducted three PIs (Witzel, 2000) with leading, senior personnel and nursing managers of the Klinikum Görlitz and the Krankenhausakademie, all of whom were white and German. The interviews were recorded electronically and subsequently transcribed in excerpts. The evaluation was carried out in a structured and rule-guided manner using a qualitative analysis approach, namely 'Qualitative Inhaltsanalyse' (Mayring, 2019). Subsequently, the collected data were systematically analysed and condensed to reveal key messages. Furthermore, messages with similar content were grouped under a single theme.

Finally, interviewees identified five themes or issues that could be fundamental and vital to a nursing education of trainees from Cameroon. These were (a) language skills, (b) the in-company perspective, (c) the school perspective, (d) the out-of-school and out-of-company perspective (social environment) and (e) preparatory training in Cameroon. These themes are discussed in detail along with initial recommendations for action.

## **Results**

### ***Language Skills***

First and foremost, the interview data revealed that the hospital actors are concerned about the candidates' German language skills. They fear that Cameroonian trainees may have insufficient language skills for everyday nursing work. Although future nurses from Cameroon are expected to acquire the German B2 certificate before starting their training, the interviewees do not consider this sufficient for (a) communicating with colleagues, doctors and patients in everyday nursing care settings without challenges or loss of time or (b) for dealing with regional dialects. The respondents recalled earlier experiences in other institutions or with Eastern European nurses, where migrant nurses – despite a high level of German proficiency – experienced considerable problems, especially in nursing documentation. The interviewees anticipate major challenges with handwritten documentation, which is especially important in domiciliary care settings (training covers domiciliary care). Meanwhile, the digitalisation of all documentation procedures at Klinikum Görlitz may prove to be beneficial in this respect. Nevertheless, respondents fear, for example, that doctors' orders or instructions shared during rounds – typically in great haste – may not be properly understood and may be incorrectly executed. Further, they expect that work processes may suffer if a considerable amount of time is spent on joint documentation with the Cameroonian nurses or if shift handovers are lengthened due to poor documentation abilities on the part of the previous (migrant) shift workers. If such difficulties occur, Cameroonian employees may likely be subject to team exclusion, or the nursing staff's commitment to cooperation may weaken.

### ***Proposals***

To address this potential problem, some of the senior hospital staff see themselves as responsible for the process of language acquisition. Furthermore, the Krankenhausakademie is considering the possibility of offering language support courses at least in the first year of training. In my opinion, such courses should focus on teaching technical vocabulary, in-nursing documentation and reading instructions from colleagues and doctors, both in digital and handwritten formats. Funds should be sought for recruiting external foreign language teachers, as the interviewees believe that such teachers may be more competent at teaching a foreign language than those at the Krankenhausakademie. For an effective learning environment, I recommend a close link between the supplementary courses and the practice-orientated training at the wards as well as the use of authentic nursing documentation from everyday routines (covering the contexts of domiciliary care and care homes).

### ***The In-Company Perspective***

This dimension addresses the potential situations and challenges associated with professional cooperation within the nursing team at the ward level in the hospital. Given the high degree of work pressure in nursing, the interviewees have low motivation for extending collegial support or cooperation to the Cameroonian trainees; this may also be accompanied by great mistrust. It is likely that established caregivers will not or cannot offer language-sensitive guidance or support in communicating with patients and other professionals or with documentation to the Cameroonians. The interviewees anticipate increased stress levels resulting from additional workload for the established nursing staff, who are already heavily strained with daily work. These situations can manifest in many forms of exclusions. The proposed training programme expects established nurses to offer Cameroonian nurses attention and support that they themselves have not received or do not receive in their professional lives. At present, institutionalised guidance from the so-called practical instructors ('Praxisanleiter/innen'), equipped with the requisite additional qualifications for training, does not adequately meet the needs of nursing students with higher support requirements. Currently, a student nurse is only offered five days of structured instruction per year of training. Increasing the days of instruction in a year is an aspect that needs to be examined in future.

A lack of solidarity among white German nurses is also an issue that the interviewees have highlighted. These divisive tendencies are particularly evident between older and very young caregivers as older caregivers are believed to compensate for the alleged lack of responsibility or poor attitude towards work shown by the young carers. Interestingly, the interviewees agree that the Cameroonian trainees, at least in their first year of training, should be placed in wards characterised by a supportive and solidarity-based team culture, which 'do not make it so difficult for the trainees' (Interviewee1 [senior executive], personal communication, 03/06/2023) and where the ward directors have more employee-friendly leadership and self-reflection skills. The management style of older ward managers tends to align with the belief that 'apprenticeship years are not master years' (Interviewee1 [senior executive], personal communication, 03/06/2023). As a result, they repeatedly act out their own unfortunate, authoritarian training experiences with today's trainees.

### ***Proposals***

Overall, the data suggests that Cameroonian nurses are likely to encounter precarious working conditions and conflict situations in the hospital context – and these need to be addressed for all the nurses involved. The following statement, made repeatedly by the interviewees, should be recognised: 'On the ward, everyone has to function' (Interviewee2 [senior executive], personal communication, 02/18/2023). Accordingly, I recommend the provision of mentors for the Cameroonian trainees on each ward, who can invest the necessary resources to accompany them in their daily work. Such mentors are already available – at least theoretically, their number varies between three and eight per ward. These mentors are prepared for their responsibilities via a multi-module, certifica-



tion-based seminar, which aligns with the catalogue of continuing education opportunities offer by Klinikum Görlitz. It must be noted, however, that because of a (perceived) lack of nurses, the mentors do not (or cannot) perform their responsibilities properly. In theory, it is their duty to ensure successful onboarding of staff, offer daily learning support and intervene at an early stage in the event of subtle or expressed team dissent. However, interviewees note that 80% of mentoring activities are not implemented due to shortage of time as the nursing staff with mentoring duties do not obtain any relief for their additional responsibilities during their daily work routines. In-house solutions to this problem need to be discussed urgently. Currently, some nursing staff are mentors because they have been asked to play the role. Instead, suitable employees with an interest in such responsibilities should be encouraged and appointed.

Additionally, I recommend using the existing work structures, such as meetings of nursing service managers, ward directors and practical instructors, to discuss the anticipated stress of individual nursing teams as well as the topic of everyday racism. External mediators or educational inputs can also be beneficial in addressing the issue. Since team supervision is not usually implemented on the nursing wards, it is important to raise awareness about the above-mentioned issues at least among senior staff. Internal resources should be made available for such training and reflection opportunities, preferably over several days. Unfortunately, such investment is not a priority for the hospital management at this stage.

It is interesting to question if a course on cooperation in intercultural nursing teams should be included into the existing catalogue of continuing education opportunities at the Klinikum Görlitz. However, interviewees report that all ward managers are required to participate in an 18-month long extra-occupational training course anyway, which already covers topics such as leadership and the onboarding of and dealing with trainees. Given their experience, the interviewees believe that including an elective course on intercultural cooperation in the hospital's catalogue of courses (each lasting 90 minutes; the 18-month course is not part of this catalogue) is unlikely to meet with much success.

Using the established – and interviewees' suggested – means of company communication, such as podcasts, company meetings or the intranet, to provide information about the training of Cameroonian nurses seems insufficient for comprehensively dealing with the above-mentioned problems. To create a basis for a successful cooperation within the team, these paths should be only used as supplements.

### ***The School Perspective***

Regarding the school context, the interviewees mainly expressed concerns over the correct ratio of Cameroonian to German trainees in a class in order to elicit the highest possible degree of participation and cohesion. On the one hand, having a very small number of Cameroonian nursing students in each class may result in feelings of foreignness and exclusion. On the other hand, if the number is too large, parallel groups may form, and it could impede the development and strengthening of class unity as well as joint, inclusive learning and mutual support.

### ***Proposals***

Such potential dynamics could be countered with targeted team-building exercises as part of the lessons. They will not only help reduce the perceived feelings of isolation but also enhance the development of solidaristic behaviours. In this context, I recommend regular exercises by vocational teachers to promote group and empowerment processes, along with reflections on everyday racist stereotypes. Group exercises, workshops with a technical focus (e.g. nursing-related project work or project work that addresses the topic of discrimination) or those stimulating (self-)reflection processes, such as check-in rounds or end-of-day rounds, should be conducted. They offer a good opportunity for students to focus on their current challenges in the school, in the nursing practice or in everyday personal life and seek peer support. The extent to which the individual teachers need to be prepared for such activities must be explored in discussions with the school management and with the teachers themselves. Currently, a social worker is available at the Krankenhausakademie to strengthen social participation processes. In future, it is worthwhile investigating how social work can aid the inclusion of Cameroonian nursing students and strengthen the solidarity within the class community.

### ***The Social Environment***

According to the interviewees, an aspect that the Krankenhausakademie cannot address is assisting Cameroonian nursing students in accomplishing regular and basic living tasks in the district of Görlitz, such as signing a rental contract, opening a bank account, contacting public authorities or finding a general practitioner. However, these social participation processes as well as developing a stable social network in the district of Görlitz and the surrounding area are rated as crucial for successful vocational training in a new cultural environment.

It is important to note that the district of Görlitz has a high number of supporters of Alternative for Germany (AfD), which is a party known for its centre-right politics. Thus, a high number of citizens are sceptical or even hostile to immigrants. The interviewees believe that the district of Görlitz is primarily responsible for raising awareness about everyday racism among the population. In other words, they do not (yet) see themselves as responsible for sensitising their (senior) staff to the problem of racism. Interviewees felt that their colleagues, particularly on individual wards need to 'get their shit together' (Interviewee1 [senior executive], personal communication, 03/06/2023) which completely ignores racism issues. On the one hand, the lack of financial and time resources is a barrier to cultural training. On the other hand, the responsibility for helping trainees cope with rejection, discomfort and everyday racism is placed on individual wards and on individual nursing staff. In this context, in-house communication should help staff members recognise that the recruitment of migrants is a benefit to the nursing system and to themselves. In official communication, the interviewees presume a necessity to represent the Cameroonians as an 'innovative asset' (Interviewee1 [senior executive], personal communication, 03/06/2023).

However, attitudes conducive to a discrimination-free working life are difficult to find. My conversations with hospital leaders are marked by the effects of (colonial) racist/racialised knowledge and, more precisely, the topos of laziness, as discussed above. Interviewees share fears – without any experiential evidence – that Cameroonian nurses will struggle to meet the established work demands or the ‘German way of working’ (Interviewee2 [senior executive], personal communication, 02/18/2023). They will be overburdened, will ‘groan under the pressure’ (Interviewee2 [senior executive], personal communication, 02/18/2023) and drop out of the training programme.

### ***Proposals***

To support social participation processes, the interviewees believe that trainees should be informed in Cameroon about the basic living structures in Germany (for example, as part of the preparing intercultural course). Furthermore, the establishment of mentoring structures in the district of Görlitz should be targeted. To this end, assistance can be sought from students of the Faculty of Social Sciences (especially the Social Work programme) as well as those from the Faculty of Culture and Management (especially the nursing programme). In addition, the Welcome Alliance (Willkommensbündnis) of the city of Görlitz can help with the process. The alliance was founded in 2015 with the increased influx of refugees and has now developed a large pool of potential mentors for social integration processes. However, it is unclear who should shoulder the responsibility of setting up such a mentoring network in the future.

Given the high number of right-wing supporters in Görlitz, preparing for the possible rejection of future trainees in society which could occur during interactions with patients and colleagues may be essential. To exchange and reflect on individual experiences and ways of dealing with rejection and racism along with other affected people, it is advisable to develop self-organised support groups that are affiliated to professional social work organisations, such as the Görlitz victim consultation group (Opferberatungsstelle).

### ***Preparatory Training in Cameroon***

Regarding preparatory intercultural courses, the hospital actors consider it relevant to sensitise prospective nursing students in Cameroon about the subjects, tasks and the contextual conditions of nursing in Germany. Since the contents of the training and the expectations of nursing differ worldwide, preparatory training can prevent disappointments related to misaligned expectations and, consequently, potential dropouts from training. In particular, preparatory training can address the range of nursing responsibilities that are similar, or distinct from, those in the medical profession. Nursing in Germany – unlike in other national contexts – only covers medical treatments or medical knowledge to a limited extent. In Germany, the emphasis is, to a large extent, on basic care services such as bathing, feeding and providing assistance services.

### ***Proposals***

Prospective nursing students in Cameroon should be provided with socio-cultural knowledge about family structures and living conditions of older people in Germany (e.g.

often live alone, separated from children) as well as different cultural approaches to hospital organisation (e.g. physical care in hospitals and nursing facilities is the task of professionals and not family). However, since the Cameroonians will not be recruited as professionals until they receive training in Germany, they seem to be in a safe zone in that discrepancies in expectations may not be highly problematic.

Finally, the interviewees highlight the need for imparting knowledge on social integration processes in Germany. Tasks such as opening a bank account, dealing with local authorities and signing a rental contract should be covered as part of the preparatory courses in Cameroon. Accordingly, it is necessary to examine whether and to what extent the everyday life and social participation processes of the interested Cameroonians differ from those of the people socialised in Germany.

## Conclusions

The Klinikum Görlitz is not inclined to investing additional financial and personnel resources for more successful cooperation with migrants. Highlighting the stressful daily nursing routine, which currently offers few options for improvement, one of the interviewees says, 'I already feel sorry for the Cameroonian trainees.'

Klinikum Görlitz believes in treating all trainees – with or without special needs – equally. To address the (imminent) shortage of qualified nursing staff, the hospital is ready to 'gladly participate' (Interviewee1 [senior executive], personal communication, 03/06/2023) in the recruitment project discussed here; however, it does not seem to fully understand this 'undertaking' or this 'project' (Interviewee1 [senior executive], personal communication, 03/06/2023) as its own, which is evident from the findings presented above. The hospital considers that the 'distress [of the shortage of nursing specialists] is not yet so great' (Interviewee1 [senior executive], personal communication, 03/06/2023) as to warrant special investments in this process. However, such an evaluation undermines the harsh realities of demographic changes and the risks of inadequate provision of general interest services.

## Summary and Final Reflections

From the studies presented here, two main problem areas can be identified in working together with migrants. Firstly, racist knowledge is embedded in people's everyday practices. Linked to colonial legacies, it particularly problematises, if not excludes, cooperation with BPoC. This has been explained in detail via the example of the laziness phantasm. Secondly, this racialised body of knowledge tends to be de-thematised by the economic constraints and limited time resources that characterise nursing and elder people's care in Germany. Simultaneously, the responsibility for non-discriminatory interactions with migrants and dealing with potential discomfort and resistance is individualised.

It can be deduced that the implementation of the following is necessary: (a) sensitisation measures that address everyday racism and (b) workshops or exchange formats for solidarity-based cooperation in the nursing team given the existing economic constraints and personnel shortages. The latter inevitably highlight the questions of 'good work' and

employee-friendly working conditions and, not least, call for an investigation of the nursing system itself and the structural changes needed.

In light of the projected population changes and the number of nursing professionals needed in Germany, targeted investments of personnel and financial resources are necessary to enhance cooperation processes. Future research should address application-oriented measures – contextually – for building an anti-racist organisational environment and creating the conditions for 'good work' using a participatory approach. At present, Saxon employers in nursing and elder care need to invest significantly greater efforts to realise the potential of a qualified migrant workforce and, above all, to ensure the successful social and professional participation of migrants.

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*Inocent-Mária Vladimír Szaniszló*

*HUMAN RIGHTS AS A FUNDAMENTAL PILLAR FOR BUILDING  
CROSS-CULTURAL RESILIENCE OF THE INTERNATIONAL  
COMMUNITY IN THE 21ST CENTURY*

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Abstract

We would like to contribute to an understanding of building Cross-cultural resilience by developing the concept of human rights from the perspective of Catholic social teaching in the 21st century, taking into account the ethics of society and the ethics of the individual members of that community. The bearer of these rights, every human being, was considered to have a single, identical common reason. This rational character initially coincided with the reason that governs all of nature and is manifested in its laws. Therefore, the norms of human rights, based on the rational character of nature, were also called universal, i.e., valid for all rational beings in the universe, because they coincided with cosmic laws.

Our study aims to deepen the understanding of this important topic for the eventual general acceptance of human rights issues. This is important in light of the theory that human rights are non-negotiable and are no longer just a question of ethics and morality, but of security and peace among international communities, e.g., to help Cross-cultural resilience building. The method used in our research is comparative and inductive.

The summary of our research should contribute to a better argumentation in promoting this agenda in major international institutions. This paper's theoretical and practical significance lies in clarifying the historical and current relationship between churches and civil societies on the issue of human dignity and human rights so that their understanding and recognition can positively impact the development of modern society's common good.

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*Keywords: human rights; Catholic social doctrine; freedom of citizens*

## **Introduction**

Oskar Krejčí, a well-known Prague professor and political scientist, begins his book *Human Rights* with the sentence: There is no such thing as natural, non-deterministic and inalienable rights. But it is one of the most successful political visions of recent decades and an important educational element. (Krejčí, 2011, p. 10). And we can add to it by building Cross-cultural resilience. Our cross-disciplinary approach focuses on the theological-philosophical and social perspectives of Christian churches with the help of several experts from opposite scholarly spectrums.

Krejčí seeks to answer the question: What does the word right mean and what is humanity? For him, a right means a justified claim related to law on the one hand and justice on the other. It is a consciousness of necessity providing support from the state and soci-

ety, thus something more than law. At the same time, despite the writer's difficulty in understanding the essence of human beings, he emphasises: that there is no concept of law without the concept of morality (Krejčí, 2011, pp. 149-150).

Thus, we can talk about human rights and their application only from the moment when a person is understood based on his/her freedom, which is based on responsible self-determination (Hanuš, 2002). In this case, however, the political order suggests and does not create freedom and humanity for the human being in the first place (Hanuš, 2002, p. 40).

The question of human rights is generally a response to the ongoing danger of abuse of power, even clerical power. The topic itself dates back to the Enlightenment (18th century). It is not just about existence, but about life itself, which corresponds to man's desires and possibilities, his abilities, ambitions and purpose.

In the beginning, some churches opposed the idea of human rights until the middle of the last century. As Schwanke, a Protestant theologian from Dresden, recalls, their position was based on the one hand on the origin of the idea in the Enlightenment, on the other hand on the view that individual human rights empower each person disproportionately and rob him of his character of duty to community and faith (Schwarke, 2007).

Many modern, especially Western, scholars and thinkers as well as organisations consider human rights as a very important advancement of humanity. Tödt, a Protestant theologian from Heidelberg, in his extensive study of human rights as fundamental rights, notes that human and fundamental rights are a sign of a new period and a humanistic cultural movement whose meaning is not sufficiently appreciated (Tödt, 1982, p. 9). The idea of human rights is currently in the spotlight due to technological civilization and issues of bioethics research, where once again there could be an abuse of power against the individual. Finally, Švanda reminds us that without a wide political acceptance of human rights, the technical domination of the world is not possible (Švanda, 2001, p. 110). Furthermore, we can also add Cross-cultural resilience building in modern society.

According to Austrian Catholic theologian Schambeck, human rights in themselves represent an embodied value of the human being that precedes the state and its legal order. That is, these rights are pre-positive, some would even call them innate (Tödt, 1982, p. 39). These rights cannot be created by any state by any law. On the contrary, positive law must instead recognise them (Schambeck, 2008).

### **The important process of validating the universality of human rights**

The bearer of these rights, every human being, was considered to have a single, identical common reason. This rational character initially coincided with the reason that governs all of nature and is manifested in its laws. Therefore, the norms of human rights, based on the rational character of nature, were also called *universal*, i.e., valid for all rational beings in the universe, because they coincided with cosmic laws. However, this doctrine has somehow lost its metaphysical justification and its validity in the course of history. Reason believed that it had discovered its historicity (i.e., the relation of its knowledge to a particular time, space, and particular conditions). Thereafter, legal human norms, as well as nature, ceased to be considered eternally valid. Thus, the problem of the



validity of human rights began to emerge. Their deep anchoring in rational law through Kant fell by the wayside. Marx pointed to human rights in their social class context. Formally, civil-state equality is ascribed to man as a citizen to better legally sustain the actual inequality of the people as citizens. It was only after the crimes of Hitler and Stalin that human desires were strengthened so that there would be universally applicable human rights norms. Those who want to accept universally valid norms must be also able to cooperate scientifically across disciplines - e.g., on the question of God, science does not have the proper competence (Tödt, 1982, p. 39)- for a real building of Cross-cultural resilience. The Bavarian human rights expert Maier points out that in the communist and socialist countries of the Eastern Bloc, the liberal civil liberty and the fundamental rights and freedoms belonging to it were negated. The individual notion of freedom was rejected (even though it was declared to be freedom for everyone) as an invention of the bourgeoisie and a cover for the interests of a minority. Material freedom was pitted against formal freedom. It then became clear that social rights could not exist without individual rights to liberty (Maier, 2001, pp. 20-21).

Nowadays, modern liberal (civil statist) rights theory understands fundamental rights primarily as the free rights of each individual, which are valid as unlimited. This theory strongly considers that human dignity and personal spontaneity are at their core indisposable in terms of state action. On the other hand, this theory understands equality in a very limited way as *a negative equality* before the law. According to Tödt, this leaves less room for sharing (solidarity) and raises the question: Which conditions for the participation of all citizens in public life are advantageous? (Tödt, 1982, p. 32). He also points to the problem of pointing to a higher authority in the value theory of human and fundamental rights. He raises another important question: who is the origin and reason for human rights: nature, God or the law? In addition to other theories of law (institutional and functional), this one could yield very strong positive legal thinking. Very often it becomes a legacy of natural law thinking without a clear profile. However, to avoid the religious orientation of this theory, its authors, the German Constitutional Court dissociated itself from the overly positive value system of fundamental rights and admitted that only the constitution and not the various studies on natural law were the test case (Tödt, 1982, p. 33). According to Schwarke, the origin of human dignity must be grounded outside any dispositive human power. In doing so, he points out that the philosophical justification of the autonomy of human dignity is itself rooted in a religious dimension (Schwarke, 2007, p. 266).

Tödt adds that even the 18th-century idea according to which human rights are given "by nature" (i.e., they arise in a natural-so-called original, pre-social state, before the state and its laws, i.e. they are pre-institutional) and must take precedence over society and the state, no longer holds water today. Krejčí points out that this original assumption of the Salamanca school, that the state or society came into being by a contract of some Robinsons, is a utopia (Krejčí, 2011, p. 16). According to Tödt, it is impossible to know any pre-social status of any human being. This is an ideal fiction for a valid clarification of these rights. On the contrary, human rights and human dignity must be protected precisely within civil society. Their validity does not naturally derive from the state or society but

is considered to be established by them and thus unavailable (Tödt, 1982, p. 30). But like the teaching of many eminent philosophers, Catholic teaching holds that there are rights which naturally belong to every human being.

Compared to animals, only humans can be the subject of human rights. Man's priority to nature or the special position of the individual in society were already central points of human dignity in Greek Stoic philosophy (Schwarke, 2007). This right is at the service of every human being and is aimed at the development of human beings (Günthör, 1996; Klose, 1990). The human being is, according to St. Thomas Aquinas: *animale sociale et politicus* (D'Aquin, 1997, p. 92). The recently deceased German Catholic theologian Schockenhoff adds that the primacy of the human being as the bearer of rights and freedoms is grounded precisely in his responsibility as an ethical value that he cannot delegate himself (Schockenhoff, 2009, p. 226). Finally, the close connection between human rights and human dignity names its *protective* function. Although most scholars point out that in ethical conflicts it is often impossible to determine the exact specification of human dignity, we can speak of a consciousness of when this dignity is trampled upon (Schwarke, 2007, p. 267).

### **Human rights must always and everywhere apply equally**

Krejčí develops a theory of the changing content of the idea of human rights throughout the history of man on earth. By this change, he means concretization at different stages of history (Krejčí, 2011, p. 75). Krejčí points out that many see the basis of freedom, as the only real right, in Kant, who writes in the *Foundations of the Metaphysics of Morals* that real freedom is the measure of humanity. Kant contrasts this freedom with natural necessity. Thus, it is not the fulfilment of libertarian arbitrariness but the fulfilment of the moral law in us: the laws of freedom, according to Kant, are investigated by ethics (Kant, 2017; Krejčí, 2011, p. 92). Just as Kant defined human dignity, we still speak of an inviolable dignity, to be saved and protected at all costs, and has no equivalent. If a person has dignity in this sense, then he is also an *end in himself*. Not everything is empirically valid, because human beings are also part of society and the political system. Even in this case, however, he need not derive his end from the ends of these systems (at least not in an earthly sense). If we were to understand human beings in terms of their function in the system, both their aim for themselves and their dignity would be lost. Therefore, we need to limit this view and find a different one (Tödt, 1982). Human dignity was usually derived from how man represented a subject that transcended himself.

The originality of the idea of human rights is its *comprehensiveness* and *universality* (Krejčí, 2011, p. 149). Humanistically, human dignity cannot be proven, only assumed. However, it can be pointed out that in a system where human dignity is not considered inviolable and man is considered an end in himself, there is an identification of the goals of the state and society with the goals of man, or the goals of preserving the system are placed above the goals of the system of preserving the goals of man. Therefore, *untouchability* and man's end in himself have been given a major directive role in fundamental and human rights theory (Tödt, 1982, p. 29).

According to Günthor, the history of modern dictatorship shows that rules and laws created without any basis of permanent fundamental rights growing out of the nature of man face the overbearing attitude and the desire for power and end up sideways: the expected right is transformed into injustice. This foundation of permanent human rights is enshrined in an inviolable code of ethics, which in the case of Christians is the Ten Commandments, the Holy Scriptures, the authority of the Teaching office of the Church, and Tradition. These factors, according to Melchior Cano, are called *local theologicis* (Günthor, 1996, p. 88). Günthor goes on to say that human rights are violated in many political systems that do not respect individual human dignity, or according to Krejčí, there is a defence against the arbitrary will of the sovereign (Krejčí, 2011, p. 12). These are mainly collectivist systems. For example, communism says that man as an individual has no meaning in himself but is a tool to achieve the goals of society. Therefore, the human rights of individuals have no place or meaning here (Günthor, 1996).

It was Tödt who mentioned the theory of the human rights of individuals as one of the most important theories of political philosophy. One interpretation is that the modern state wants to put an end to the exercise of individual self-righteousness (blood revenge, etc.) by elevating itself above the individual as lawgiver and holder of a monopoly on violence. Only the state is capable of securing and protecting the liberty, property and peace of the individual. In this way, however, state power has strengthened its ability to keep citizens under pressure unjustly. Against such treatment, each individual must exercise so-called pre-rights, which are based on moral natural law. The relevant theory here explains that in the "state of nature" every person has natural rights. The state or society gains its legitimacy by cheating him of his rights, which the individual (citizen) affirms by conforming to his will. This method is a way of limiting the rights and powers of the individual vis-à-vis the state power. By this act, as described by Montesquieu in his book *Esprit des Lois*, the sovereign also stands not above but below the law through the distribution of power (violence) using human and civil rights and the associated democratic rights of separation of powers and rights to control (Tödt, 1982, p. 15). However, man as an individual should not be at the mercy of state power. He also needs space for his improvement. Thus, the citizen has rights not only in a state-law society but also towards this society. One question is still open: where do real human rights come from and to what extent could the state deny them? Finally, Tödt concludes that it is not appropriate to ground the theory of human rights in a very religious way, i.e., not to advertise them because of faith, but it is the natural ethos of a humane world society. Referring to Martin Honecker's theory, he says that ethics itself appeals to the universal human, and not only to the Christian. This, however, loses the universality in the Gospel. Christian faith seems to lose direct relevance here in the context of human rights advocacy. This is true for those who separate the Christian and the universal human (Tödt, 1982, p. 48).

Tödt explains the non-disponibility nature of human beings as follows: if human beings are determined about God, then secular relations are influenced by this fundamental relation. The freedom of religious belief thus finds legal protection also in the space that man claims as a being addressed by the Supernatural. It is precisely this freedom of faith that plays a very important role in the discovery and refinement of the idea of human

rights. *The personal freedom of the individual is this secular form of freedom of faith.* The inherently humanistic demand for equality shows that Christians defend the free rights of others, based on service to the neighbour, and do not admit discrimination. It is the struggle for equality that is the requirement of love of neighbour (Tödt, 1982, p. 52). Human rights in the Church must be transformed into Christian rights in the Church. Otherwise, the affirmation of the faith of the Church becomes untrustworthy. The twofold commandment of charity also comes into play here (Tödt, 1982, p. 54).

### **The Catholic Church and the process of defending individual human rights as building cross-cultural resilience**

Schambeck asks his opponents the question: The Catholic Church and human rights? They don't go together at all! Rights must be enforced precisely and despite the power of the Church! In his analysis, however, this now emeritus professor of public law, political science and philosophy of law at the University of Linz and president emeritus of the Austrian Regional Council in Vienna argues that it is precisely through the doctrine of human rights that the Catholic Church seeks to strengthen the position of the individual in the state. These ideas interfere with the relationship between faith and the political establishment in the state (Schambeck, 2008, p. 2). This relationship begins with the fact that the Church does not advocate any political agenda, but a doctrine based on the faith in Jesus Christ for the salvation of man. The latter participates in both religious and political life.

Schambeck goes on to say that for the believer and the Catholic Church, then, the state, its legal order, and the human rights associated with it have a twofold significance: first, it is through law and the state that the degree of individual freedom recognized (which cannot always be completely relaxed) is determined, and second, in that the whole political conditions of our lives profoundly affect the individual human being.

Schambeck points out that it has never been the role of the Catholic Church to develop its teaching on the relationship between law and state. Rather, based on the doctrine of salvation, it has been concerned to develop, according to the demands of the pastoral situation, a value-strong relationship with the state and its order. At the heart of the Catholic teaching on salvation is the doctrine of man created in the image of God, who establishes his freedom and dignity.

Schambeck reminds us that the idea of human dignity is much older than the idea of human rights (Schambeck, 2008, p. 3). In the past, popes have defended human dignity, especially the right to life, liberty, and private property. They did this much earlier than in the case of other rights (democracy and liberty rights). Schambeck notes Pope Eugene IV's bull *Dudum nostras*, issued in 1435, which deals with the slave market; Pope Paul III's bull *Veritas ipsa*, issued in 1537, on the human dignity of pagans; Pope Urban VIII's bull entitled *Commissum nobis*, issued in 1639, to prohibit any man from selling, enslaving, or stealing the citizens of the West and South Indies, as well as their wives, children, and property owners, and also a bull of Pope Benedict XIV entitled *Immensa pastorum*, issued in 1741, which deals with fraternity over any racial differences, and Pope George XVI's apostolic letter *In supremo*, issued in 1839, to be strict against slavery in Africa and India and the black slave market (Schambeck, 2008). Historically, there has been concern about

the association of human rights with a lack of concern for religion and an anti-religious stance. In his Encyclical *Immortale Dei*, which was published on November 1, 1885, Leo XIII considered at first the idea of human rights as, ultimately, a doctrine of unrestrained liberty (originating in the French Revolution). This doctrine was incompatible with any Christian doctrine or with the moral natural law (Tödt, 1982). The first approach was his Encyclical letter *Rerum Novarum* published in 1891 and *Quadragesimo anno* by Pius XI published in 1931 (Schambeck, 2008, p. 8).

It was the social teachings of the Church of the 19th Century popes that pointed the way to the acceptance of democracy as a political system of the state. It began with Leo XIII. Although this great Pope is still critical of liberal democratic views, he nevertheless rejects, after the Church's experience of the French Revolution of 1789, any form of Jacobin democracy, and even distances himself from the form of state monarchy that had been accepted until then, in which the Catholic Church had felt comfortable since it had gained its freedom. In the Encyclical letter *Libertas praestantissimum*, published in 1888, Leo XIII agrees with the model of "healthy democracy" created and completed by St. Thomas Aquinas. According to this doctrine, the Church was ready to recognize any state, regardless of its form of government, its structure and its political system of order, when it recognized that it would serve the common good and protect freedom and human dignity. In the Encyclical letter *Quadragesimo anno* by Pope Pius XI, published in 1931, one can see the rejection of any state omnipotence and totalitarianism in the spheres of law, state and politics that are incompatible with freedom and human dignity. It accurately describes the definition of the principle of subsidiarity. It was the cornerstone of the exercise of mutual assistance to protect the small from the great and to assert self-responsibility protecting the human person from the omnipotence of the state. The Catholic Church first publicly acknowledged its endorsement of democracy during Pope Pius XII's 1944 Christmas radio address *Benignitas* on "the true one democracy." Here, the terrible, disturbing barbarities of World War II played an important role, but also the condition of the moral quality of the people's representatives, on whom the high political decisions in a democratic state will depend. Pius XII suggests that only the selection of spiritually strong and character people can guarantee such a process. Otherwise, all systems can easily turn into absolutist systems by not respecting the immutable fundamental and natural laws and revealed truth (Schambeck, 2008, p. 13).

Despite these efforts, there are real differences in the justification of human rights between the 1948 UN Declaration and the Church's understanding. In the vote, it was rejected to add a reference to God in the first article of the Declaration. The rejected reference to God was: Created in the image and likeness of God, they are endowed with reason and conscience (Tödt, 1982, p. 34). This idea expresses the trauma that links churches and the civil state in building resilience through human rights theory. Finally, we must remember that evangelical churches rejected the idea of human rights until the 1970s. Theologians were hampered by the historical association of human rights with the Western European materialist and partly atheist Enlightenment, which was different from the North American understanding. The wars of liberation in the second half of the 20th century

unleashed religious patriotism among evangelicals. This sparked a national Protestantism. Nationalism, however, distrusted the individualistic idea of human rights, because the citizen was to feel first and foremost not as an individual, but as a member of his nation, and thus to identify his interests with those of the nation (Tödt, 1982, p. 35).

Günthör notes that, like the UN Declaration, the Encyclical letter *Pacem in Terris* and the Second Vatican Council document *Gaudium et Spes*, Article 26 (The Holy See, 1965b), speak only of the rights granted to the individual concerning others and the state. They are not about the rights of the state concerning individuals or of one nation concerning another nation. "Rights of man" means each human being. A decisive turning point in the Church thus occurred under John XXIII, his Encyclical letter *Pacem in Terris* of 1963, which laid the Christological foundation for the justification of the dignity of the human person, and thus became a signpost on the way to the documents of the Second Vatican Council (Günthör, 1996, p. 99). In this Encyclical letter, which turns 60 this year, the Pope includes among the human rights: the right to existence and the preservation of life; the right to truth, honour and the formation of spiritual faculties; the right to a free conscience; the right to choose one's state of life; the right to the free initiative in the economic sphere and the right to work (the right to a fair wage); the right to associate in associations; the right to choose one's place of residence; and, on the political level, the right to active participation in public life (Schambeck, 2008).

In the *Pacem in Terris* chapter "Contacts between races", the entire definition of human rights is found:

*„The universal common good requires the encouragement in all nations of every kind of reciprocity between citizens and their intermediate societies. (...) Nothing must be allowed to prevent reciprocal relations between them. (...) Nor must one overlook the fact that whatever their ethnic background, men possess, besides the special characteristics that distinguish them from other men, other very important elements in common with the rest of mankind. And these can form the basis of their progressive development and self-realisation, especially regarding spiritual values.“* (John XXIII, 1963, art. 100).

John XXIII knew that for the state to protect fundamental human rights, it was necessary to gain international recognition to better build resilience. He considered the 1948 Universal Declaration of Human Rights to be a "sign of the times" in the way it acknowledged the participation of these rights in the moral natural law (Tödt, 1982, p. 39). The importance of the UN organisation was confirmed by the visits of Paul VI, John Paul II and Benedict XVI. It was Benedict XVI who, on 18 April 2008, on the 60th anniversary of the Charter of Human Rights, reaffirmed human rights in the moral natural law without falling into the danger of relativism.

The Second Vatican Council considers God's call to be of great importance and therefore identifies the human person, while at the same time justifying his or her dignity and reliable fundamental rights. Its 1965 declaration *Dignitatis Humanae* and *Gaudium et Spes* Article 41 point to the Church's cooperation in the realisation of human rights (The Holy See, 1965a; The Holy See, 1965b).

These are thus distinguished as justice, peace and the protection of creation. An example is the 1974 *Message on Human Rights and Reconciliation* produced by Paul VI on the promotion of human rights as a demand of the Gospel (Schambeck, 2008).

According to Schambeck, it would be wrong to think that everything presented and written by Catholic moral theologians in the 15th and 16th centuries was endorsed and expected by Church authorities at all costs. The 1976 document of the Pontifical Council *Iustitia et Pax*, entitled *The Church and Human Rights*, states that there are periods in Church history in which human rights were neither demanded verbally nor defended by any acts, nor were they pursued with sufficient clarity and vigour (Schambeck, 2008, p. 4).

In his first social Encyclical letter, *Laborem exercens* from 1981, Pope John Paul II elaborated on the teaching of the Catholic Church on human rights (John Paul II, 1981) He specified work as a tool for personality development, pointed out the priority of work over capital and related social rights to universal human rights. He also highly emphasised the social responsibility of the state and the community of nations. John Paul II designates the human person as the subject of rights that no one may violate (neither the individual, nor the state, nor groups, nor classes). It therefore assumes the absolute validity of the human rights of individuals, which have priority over the state and its legal order and must not be violated. It requires recognition of the rights of the individual, the family, society and the religious community. It rejects all forms of state totality and demands the autonomy of non-state organisations (Schambeck, 2008).

The basic right to life is also included in John Paul II's Encyclical letter *Evangelium vitae* from 1995 (John Paul II, 1995), and it is his message during the World Day of Peace in 1999: "*The secret of true peace consists in the protection of human rights.*" (John Paul II, 1999, 1) For him, the first human right is the right to life. It was sacred and inviolable from the first moment of conception to its natural end. According to John Paul II, the main task of the Catholic social teaching of the Church is not only to ensure man's bare freedom but also to convey to him the responsibility for the use of freedom, as well as not to take his eyes off science (e.g., medicine in the context of the right to life and the possibilities of this science) and to use it in the sense of personality development, which requires social and economic prerequisites (Schambeck, 2008).

With the principle of common good and subsidiarity, John Paul II in his Encyclical letter *Centesimus Annus* wants, on the one hand, to prevent the state from becoming a libertine night watchman that neglects its social responsibility and, on the other hand, from creating a trust state with a huge apparatus of power (John Paul II, 1991). According to Schambeck, today's democratic state should therefore take care of freedom and human dignity corresponding to man's social abilities. This state fulfils its legal theory through legal and social ethics, where human rights have a *mediating function* (Schambeck, 2008, p. 16). Before starting his pontificate, Pope Benedict XVI pointed out that human rights are the deepest reason for the necessity of democracy and its non-relativistic core (Ratzinger, 1996, p. 45).

## **Church and civil society in a joint effort to build Cross-cultural resilience in our shared modern society**

Even if the political reality is so different from the promises in human rights declarations, the *very acceptance of social moral authority* is a reason for hope (Peschke, 1999). He believes that the mere provision of positive rights is not sufficient if it is not supported by a helpful moral attitude. It is at this point that religion could significantly help by strengthening the ethos of human rights and thereby creating a living consciousness of human rights (Luf, 1994).

Günthör summarises that, in essence, human rights are meant to enable man to realise his divine calling. These are, of course, very close to the idea of natural law. Unlike other beings, man is endowed with reason and free will, and thus all men share a common dignity. The recognition of human rights creates an obligation for all to recognise the common rights and duties that flow from human nature (Günthör, 1996, p. 100). However, Peschke cites David Hollenbach's theory, that the idea of human dignity is meaningless. If it is not better specified, it loses any connection with any kind of freedom or certain needs and relationships. Therefore, most ideological systems can appeal to this idea to be morally accepted (Peschke, 1999, p. 219). Raymond Guess from Cambridge University has the same opinion (Krejčí, 2011, p. 10). However, the Catholic Church admits that moral postulates are not enough by themselves. More important is how precise one gives legal protection to positive rights because not all items of the order are positive in advance (Schambeck, 2008).

Schambeck adds that Pope Pius XII, in his address of 13/10/1955 on "*Coexistence and symbiosis of nations in truth and love*" points out that it is very useful to see the demand of human beings through international treaties and agreements, to establish what according to natural rules will certainly not last and tries apply what nature is silent about. In this way, Pius XII notes that there are areas for positive rights that are not based on natural, pre-positive rights. This is a starting point and an area of policy decisions (Schambeck, 2008, p. 13).

At the same time, however, the Church must examine itself to what extent it can respect and apply fundamental rights, because especially nowadays it is judged according to its practice. Its prophetic defence of human rights could only be credible if others saw it as just and merciful. In this way, its service to human rights is an obligation to constantly question its conscience and to constantly clean up and renew its own life, that is, the ability to set an example (Peschke, 1999). In particular, Peschke warns the Church not to disappoint human beings in their search for justice and the desire for humanity in our world. It is also forbidden to force anyone to accept the faith. All other religious groups must have the same freedom that the Church demands itself (cf. Document of the Second Vatican Council *Dignitatis humanae*, Article 4). This cannot be called indifferentism (Peschke, 1999, pp. 549-550).

The catholic teaching on the state and human rights is part of the social teaching of the Church. In this subject, from the time of St. Ambrose, the Church developed not only individual but also social ethics. This means that in addition to moral order for the private life of the individual, it also develops a moral order for the public life of individuals in the state



and society. In his speech on September 7, 2007, during his visit to Austria, Benedict XVI pointed out Europe's responsibility for the protection of human rights, where the right to abortion, as well as the right to active euthanasia, cannot be considered human rights, but the exact opposite (Schambeck, 2008). Fulfilling the value of human rights will require an awareness of the responsibility for humanity, as well as the social, cultural, legal and economic requirements for their protection. Both the state and the Catholic Church must require educational work here. Schambeck concludes that the Catholic Church, through its doctrine of human rights, carries out a far-reaching activity that goes beyond the circle of its believers and thus becomes a contribution to responsibility for the world that can be helpful to all people (Schambeck, 2008, p. 12). Tödt states that all these rights remain philosophically always subjective - public (Tödt, 1982, p. 19).

Zoidl, the spiritual assistant of the diocesan sports organisations of Austria, entitled "Apostolic work of the church and sports for Austria", asks in his article, according to the reality of the current situation, whether the Christian principles of Europe are only history (Zoidl, 2009, p. 14). He asks if today's spiritual crisis in Europe is somehow connected with the crisis of the human image. But if we get rid of Europe's Christian roots, that is, the Christian image of a man made in the image of God, then what list of European fundamental rights will we be left with? (Zoidl, 2009, p. 14). However, Krejčí calls the theory of whether culture or religion determines the nature of human rights radical relativism, which he considers unacceptable and dangerous. Human rights do not have a transcendent quality, but rather an idea that has different historical and civilizational forms (Krejčí, 2011, p. 148).

Albrecht aptly notes that life is so bound up with a certain law that it is a question of dividing it and thinking separately. With every form of life, there is the ability to anticipate. It is not the passive response of the individual to the environment. Rather, it is the ability to anticipate that makes "life alive." For the stone does not anticipate. Thus, life is embedded in two planes: on the level of "what is" and on the second "what ought to be". Through physical-chemical-biological-genetic concepts, it is not possible to limit our lives only to the first level. If we negate the second level, we destroy life. The first level is caring for "conditions of life". The second level is about protecting areas of life so that "what ought to be" can emerge. For it is anticipation that makes life vulnerable; even faulty anticipation can easily end life. At the same time, all these interactions between life and the environment cannot be considered in a closed way, because they do not stand on their own. We feel that the ability to "keep ourselves alive" forces us to bow not only to this immense complexity but also, as it were, before the principle itself. As if these concepts cannot exist without the "dignity of life" that is "human rights", that is, a certain balance, are supposed to be guaranteed to man (Albrecht, 2001, p. 124).

## Summary

We will try to return to the question of the universality of fundamental human rights. If the moral natural law and human dignity are not taken into account in modern society from the beginning to the end of human life on earth, then we can see the message from the history of mankind that such distorted human rights will lead to a new totality. This could have devastating consequences for all of humanity. Tödt adds that where the struggle for emancipation triumphed over freedom-restricting violence, it quickly became clear that self-imposed civil liberty of individuals did not meet the basic needs of all, but created new conditions of power that brutally affected the industrial proletariat. The outwardly inverted free self-determination of the individual thus turned into a simultaneously alienated commitment to others (Tödt, 1982, p. 26). Here we must realise the importance of human rights as *peace-building rights*. If today we try to argue precisely about the value of peace and reconciliation in society, perhaps we can better defend the right of the nascent life to its birth. Finally, with the current values of "liberty, equality and fraternity (many here add the equivalent of sharing)", we must be especially concerned with *equality* when exercising any rights. Because of the horrors of the last world war, it is of fundamental importance that this equality be coupled with the inviolability (untouchability) of human dignity (Tödt, 1982, p. 28). Tödt adds that if a man wants to be a man, he has to go beyond his natural preconditions with his life plan and ensure that this plan is compatible with the natural conditions in himself and his surroundings (Tödt, 1982, p. 30). Krejčí himself concludes that human rights are, after all, political conceptions of justice (Krejčí, 2011, p. 161). The idea of human rights, then, is not just an actual trait of the individual, but the project of a new, more just global civilization (Švanda, 2001).

In the end, however, P. Švanda's admonition remains valid, in that we know from the rich experience of 20th-century power struggles that any overly dramatic and internally devoid quest for equality is, in its consequence, a struggle for power, sovereignty and effective domination (and a push for further struggle, revolution) (Švanda, 2001, p. 116).

Zoidl points out that it is the specifically Christian connection between faith and ethos that sets the limits for the functioning of Christianity as a stabiliser of fundamental values in a secularised society, for which it is precisely the churches, in their open interventions, have to give an account. Among other fundamental rights, he includes human dignity, human rights, peace, freedom, justice and solidarity. In addition to the fight for the right to life and the protection of the air, the right to national identity must also be taken into account in disputes over the treatment of religious and cultural minorities. Indeed, human dignity is independent of age, gender, race, status, language, religion, education or income. Nor does it depend on quality of life, which may fall short because of age, illness, disability, injury, or dependence on care (Zoidl, 2009, p. 15). The ethical principles of personhood (which is at the heart of the UN Declaration of Human Rights), subsidiarity and solidarity are based on the Christian image of the human person.

Of course, in addition to human dignity, we must not forget the dignity of the entire so-called subhuman world (animals and nature), as pointed out by Peter Singer in his theory of animal protection (Singer, 2009, p. 51). However, in our Christian anthropology, man and only man are destined to protect the dignity of animals and nature. Human beings

have the cultural role of working on this planet (Catholic Holy Bible, 2023, Genesis 2: 15) as God's collaborator who protects creatures, the world and human space (Zoidl, 2009, p. 16).

Maybe in our earthly world, it looks like a utopia if we try to put these values into real life. Many times we are faced with "pragmatists" who will not allow not only the supernatural but also the natural dimension of man (which the supernatural implies) to shine in its true greatness. These people will often remind us that what we are presenting is idealism and real life professes other "pragmatic" values. It is only this understanding of reality that will lead us into the grip of a new totalitarianism and away from a truly just society. Therefore, it remains for Christians to understand the challenge of engaging in the protection of human rights as innate rights, pointing out the clear connection of this protection to securing peace and the future of our life on earth.

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*Zakaria Tavberidze – Anna Margvelashvili – Tamar Zurabishvili*  
*INDIVIDUAL VS COMMUNITY RESILIENCE: CASE OF GEORGIA*

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**Abstract**

Present Paper examines the concepts of individual and community resilience in Georgia. The goal of the present paper is to investigate the interplay between individual and community resilience in the context of donor-funded initiatives at the local rural level through the creation and strengthening of Community-Based Organizations (CBO).

Present findings are based on ample fieldwork conducted in Georgia in 2022 among the active rural CBOs, using a mixed-method approach: 1) a quantitative phone survey of CBOs; 2) Focus group discussions with beneficiaries of the CBOs' activities (both online and face-to-face); 3) in-depth interviews with the leaders of the CBOs; 4) in-depth interviews with the representatives of the local self-government, and 5) expert interviews with representatives of donor organizations working to increase the resilience of local communities.

Based on the data analysis and triangulation, the paper argues that resilience building in Georgian communities is mainly undertaken by the development partners using the top-down approach, and while on an individual level, these interventions do increase resilience, on a community level the impact is much less evident, and in some cases, non-existent. The theoretical and practical implications of our findings are extremely relevant since this is the first attempt to analyze the concept of resilience in the Georgian context and the findings contribute to further future analysis in this regard. On a practical level, our findings could be instrumental for the developmental partners, working in this area in Georgia, to adjust their programming to achieve more sustainable results not only on the individual but community levels.

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*Keywords: Individual Resilience; Community Resilience; Georgia*

**Introduction**

The present paper examines the concept of resilience in rural Georgian communities after 30 years of gaining independence from the Soviet Union. Similar to other post-Soviet countries, after the dissolution of the Soviet Union, the population of Georgia had to re-adjust to the new realities, which often were harsh both economically and politically and decreased social security and quality of life significantly. It could have been expected that to survive these challenges the population might have developed community resilience strategies to cope with a variety of challenges and difficulties. However, in an example of Georgian small rural communities, we argue that this is not the case. Their level of community resilience remains extremely low or even non-existent, despite continuous attempts by international and local NGOs aiming to strengthen local development and improve the lives of the local population. Moreover, we argue that while on an individual level, such interventions are positive, resulting in increased capacities of individual CBO leaders

and project beneficiaries, they do not contribute significantly to building and/or improving the resilience of the communities which remain largely disintegrated.

The term - resilience - is difficult to translate into the Georgian language. This is partly due to the fact that the concept of resilience is very new in the Georgian context, with little or no academic research undertaken in this area. The concept is mainly used on a policy/programmatic level by international NGOs or developmental partners, who often focus on increasing individual and community resilience in relation to such areas as disinformation, natural resource usage, climate change, and the most recent – COVID-19. However, when it comes to academic research of individual and/or community resilience against more general and broad issues of community security, the present paper could be the first attempt to evidence to what extent Georgian rural communities and their populations do possess the ability to re-bounce and by absorbing the shocks of the stress, become stronger.

To understand the existing context, a historical background is important to describe. In the second half of the 19th century, when Georgia was still part of the Russian empire, Georgian public intellectuals started discussing enlightenment ideas in Georgia. The Georgian intellectual elite tried to introduce concepts related to national identity, self-government, solidarity, and civic society (Kvadagiani, 2018; Margvelashvili, 2021; Okudjava, 2021). This resulted in several activities aimed at increasing access of the population's less advantageous groups to educational opportunities in the Georgian language, the establishment of public libraries locally, and other activities. Nevertheless, the Russian Empire did not allow Georgia to create an environment where civil society could flourish, limiting both national and civic liberties, including the local/municipal self-government.

Right after re-gaining independence in 1918, the new national government implemented self-government reforms dedicated to the development of civil society and encouraging public engagement in local decision-making (Kvadagiani, 2018). Unfortunately, this development was halted by the Soviet occupation in 1921, and for the next 70 years, the Soviet centralized government structure left room neither for civil society nor for self-government.

Therefore, until 1990 Georgia had little chance to experience how self-government or self-mobilization could work in practice. Thus, when it comes to community development and community resilience, independent Georgia had to start almost from the scratch. From the 1990s, the early years of independence were accompanied by political instability, poverty, armed conflicts, and corruption which did not create sufficient conditions for democracy to flourish: both individuals and communities were struggling to survive. At that time, citizens coped with extreme hazards and difficulties by relying on mutual help, and new forms of cooperation also emerged. However, such practices were more of a temporary survival strategy that failed to institutionalize in more sustainable forms of solidarity. Lack of community resilience and atomization of communities became apparent in the 2000s: due to the struggle for political power, every attempt towards decentralization was accompanied by waves of re-centralizations (Gorgodze, 2016).

Consequently, the sense of community could not be developed, and citizens were also alienated as they were left out of the local decision-making process (Losaberidze, 2012).

In Georgia, international organizations supported and still support the development of civic organizations to boost community development in rural and/or urban areas and to improve the quality of life and political and social participation. Most of these interventions focus on strengthening the youths and women of these communities rather than the whole population as such. Throughout this period – from the first years of independence till today – the creation of the CBOs in Georgia was mainly a top-down process rather than a result of bottom-up initiatives. The studies confirmed that most of the civil organizations and CBOs were founded because of external reasons – such as international or local NGO projects, grants, and donor funding (Margvelashvili, 2021). Self-organized and voluntary groups were and are rare exemptions. As a result, once such support programs are over, with no/limited additional funding, many such organizations cease to exist. Consequently, currently, could be only around 160 CBOs in over 3,500 villages (Vasadze & Datuashvili, 2011; Margvelashvili, 2021). Hence, the intrinsic alien character of the civil society sector in general and CBOs in particular from the first days of creation rather creates mistrust among the local population (CRRC, 2019) as also evidenced by our research. Till today, the majority of existing CBOs in Georgia were and are dependent on external initiatives and funding.

### **Current context**

Despite the fact that Georgian economic growth during the last decades mostly had been positive (GeoStat, 2023) (if we do not take into account the recession during the COVID-19 period), it also remains quite uneven throughout the country. Most of the benefits of the development concentrate in urban areas, specifically, big urban areas, while Georgian rural communities, particularly those located in remote areas, face a myriad of challenges that often hinder their development and progress. For instance, in 2021 the nominal monthly income of employers as calculated by the National Statistics Office of Georgia was almost 2 times and, in some cases, more than two times higher in Tbilisi, the capital, than in most of the Georgian regions (GeoStat, 2021). These communities grapple with limited access to essential services from infrastructure to healthcare, and education. Geographical remoteness, underdeveloped transportation networks, and a lack of reliable communication systems further exacerbate the difficulties faced by the residents of rural communities in Georgia. Employment opportunities, specifically, well-paid and offering a decent quality of life are in dire demand and shortage in rural communities. Agriculture at large remains subsistence one, limiting developmental opportunities for local residents be it access to capital or technological innovations.

Thus, local community-based organizations operating in these remote communities encounter a multitude of quite unique obstacles on a number of levels. They not only often confront limited resources and funding, making it challenging to ensure the sustainability of their interventions aimed at improvement of quality of life but first, need to work on trust-building and the creation of community solidarity. An additional challenge is the

scarcity of skilled personnel and motivated volunteers in these remote areas mostly caused by both internal and international migratory flows. This, on the one hand, makes it more challenging to effectively deliver services and implement community-led initiatives, and, on the other hand, ensure high quality and sustainability of the delivery. And yet another challenge is the lack of linkages between the governmental bodies, be it local or national with the local communities, and their openness and willingness to engage with CBOs and to create sustainable programs of cooperation where the local self-government would have its own and CBOs – their own – share of responsibility. Without such cooperation, it would be naive to believe that only CBOs would be able to build trust and contribute to resilience-building in the communities.

### **Theoretical framework**

The present paper’s theoretical framework is the societal resilience concept developed within sociology. While initially the term and concept of resilience were developed in psychology (including social psychology and psychiatry) and ecology, and mainly focused on “the ability of an entity (person, ecological system, companies, etc) to cope with adverse events and then bounced back and returned to its functional state” (Surjan et al., 2011, pp. 11-12, as cited in Trkulja, 2015, p. 49), „sociologists use the term ‘resilience’ to explain the human ability to return to its normal state after absorbing some stress or after surviving some negative changes” (Surjan et al., 2011, pp. 17-18, as cited in Trkulja, 2015, p. 49) through transforming them “into relational and collective growth, by strengthening the existing social engagements and by developing new relationships, with the creative collective act” (Cacioppo et al., 2011, p. 44, as cited in Trkulja, 2015, p. 49).

Thus, the theoretical significance of social resilience undoubtedly provides an opportunity to understand resilience as an adaptive process, as some researchers expanded its conceptualization, through recovery, sustainability, and growth (Murray & Zautra, 2012, pp. 337-338). It is important to note, however, that both individuals and communities could be successful in one area and unsuccessful in another, and that both peoples and communities might recover from stressful events without achieving growth or sustainability, or not recover at all.

The study focusing on community resilience should take into consideration two levels of social resilience – individual and community levels. These types of resilience are intertwined, and different scholars define them differently; hence, these concepts require specific attention in this paper, and both should be clarified separately.

### **Individual resilience**

Individual resilience often seems like a heroic effort of an individual to respond to traumatic events. However, this response may not be necessarily “social” in its character – on the contrary, as Estêvão and his co-authors argue, “the biggest problem with the “heroic” notion of resilience is its non-social character” (Estêvão et al., 2017, p. 13). In this framework, resilience is an internal attribute of an individual, something like hidden psychological resources. The problem is that this approach does not take into consideration social relations with others (Estêvão et al., 2017).



Societal resilience theory does not dismiss an individual and his/her role in the process of dealing with risks and crises, but it further acknowledges that even individual resilience is shaped and formed during interactions with the wider community – with neighbours, groups, institutions, and the environment. Therefore, scholars argue that “resilience should thus not be understood as an attribute that is inherent to some families or individuals but as a process in which several features of the natural and social worlds are called into play” (Estêvão et al., 2017, p. 17).

The following table sums up the features of individual resilience that crosscut social and natural worlds:

Table 1: Features of Individual Resilience from a Sociological Perspective

Distinctive social manners	Agreeableness, trustworthiness, fairness, compassion, humility, generosity, openness.
Interpersonal resources and capacities	Sharing, attentive listening, perceiving others accurately and empathically, communication care and respect for others, responsiveness to the needs of others, compassion, and forgiveness.
Collective resources and capacities of individuals	Group identity, centrality, cohesiveness, tolerance, openness, management rules, self-confidence, and self-realization.

Source: The table is based on Trkulja's summary and adapted by the authors (Cacioppo et al., 2011, p. 44, as cited in Trkulja, 2015, p. 49).

Thus, from the sociological perspective, the resilience of individuals should be substantiated on the community level. To find out whether positive social change takes place or not, recovery, sustainability, and growth of individuals should be compared and discussed in contrast to changes in social structures and community reconfiguration. Hence, changes on the individual level do not necessarily lead to changes on the community level.

### Community resilience

When it comes to community resilience, keywords are participation, engagement, self-organization, and motivation of community members to proactively come together and make a collective action. However, this requires the community to be self-aware and its members should have a sense of belonging, responsibility, and collective identity. Resilient communities learn and unlearn together to prepare, face and overcome difficulties with mutual effort (Trkulja, 2015).

Estêvão and his co-authors (2017) distinguished two main dimensions of community resilience: the *mobilization of resources* and the *shifting of risks*. Resilient communities endure mobilizing all their economic, social, cultural, and environmental resources to mitigate mutual hazards. The authors also suggest classifying risks into the categories summarised in Table 2.

Table 2: Classification of risks

Types of risks	Examples
Socioeconomic	Unemployment, labour precarity and poverty.
Physical	Hunger, physical and psychological violence and physical and mental health decline.
Political	Organized discrimination of social groups.
Environmental	Pollution, erosion of arable land, lack of water and climate change.

*Source: Adapted by authors based on Estêvão and his co-authors' classification (Estêvão et al., 2017, p. 19)*

Communities' ability to efficiently use all forms of capital and resources for primary and secondary risk mitigation is crucial for their resilience. However, it should be noted that "mobilization of resources frequently entails the shifting of risks... [and] the ability to shift risks often entails the mobilization of resources" (Estêvão et al., 2017, p. 20). Therefore, the responsibility is not only on individuals or external agencies, but it should be shared within the community. Certainly, it requires trust and strong social cohesion between the members of the community.

To sum up, 'resilience' is a metaphor indicating to flexibility and adaptability of individuals as well as communities, but there is a complex relationship between the two. Without resilient individuals, a community cannot recover, be sustainable, and grow during times of hazards. Nevertheless, individual effort is rarely enough: there should be a united effort to mobilize all the available resources for good. It means that, in a stressful situation, individual resilience does not guarantee community resilience and vice versa: one might succeed, while another fails (Norris et al., 2008; Trkulja, 2015).

### Methodological approach

The mixed-method methodological approach has been used to test our hypothesis that in the Georgian rural context, resilience could be rather achieved at the individual than at the community level. In 2021-2022 we conducted a quantitative survey of 66 community-based organizations in Georgia, mainly rural communities (Table 3), covering all the Georgian regions. The sampling base was developed using the 2020 Community organizations' mapping results (Margvelashvili, 2021) which identified 110 active CBOs in the country. We used the contact information of actively functioning CBOs (emails/phones) to reach out to all of them and ask to participate in a phone survey (due to COVID-19 restrictions it was not deemed feasible to conduct face-to-face interviews at the end of 2021). The regional/geographic distribution of Georgian CBOs is uneven throughout the country, one of the reasons being mostly the activity of local and international NGOs operating in the particular regions that often are the drivers of community-based activism and foster the creation of CBOs. We contacted all the organizations mapped by Margvelashvili (2021), out of which 66 agreed to participate in the survey. In other cases, either it was impossible to get in touch with the contact person, or the organization already stopped being operational, or they refused to participate in the survey. Thus, our respondents were those CBOs that were continuing to actively operate in their communities by the time of the fieldwork. (Table 3).

Table 3: Regional distribution of CBOs surveyed in the quantitative component (frequencies and %)

Region	Number of Organizations	%
Guria	2	3%
Samtskhe-Javakheti	3	4%
Imereti	4	6%
Mtskheta-Mtianeti	4	6%
Kvemo Kartli	10	15%
Samegrelo-Zemo Svaneti	11	17%
Shida Kartli	11	17%
Kakheti	21	32%
Total	66	100%

Source: own source

In the qualitative component, we conducted fieldwork in 20 Georgian rural communities, where an active CBO is operational. During the qualitative fieldwork, we conducted in-depth interviews with the CBO leaders (20 interviews), focus-group discussions with the active beneficiaries of the CBO's activities (19 focus group discussions), and observed the activities of the organizations. We also conducted expert interviews (25 interviews) with the representatives of respective local self-governments with experience working with these specific communities and CBOs, and with local and international NGO community representatives working on community resilience building, mobilization, and development.

Table 4: Number of qualitative interviews and focus group discussions conducted

# of in-depth interviews with CBO leaders	# of focus groups with beneficiaries	# of in-depth interviews with local self-government representatives	# of expert interviews, local and INGO representatives
20	19	16	9

Source: own source

Due to COVID-19 restrictions, some qualitative interviews were conducted online, and not all the communities were visited in person.

## Findings

### *Individual resilience*

Individual resilience was manifested at two levels:

Individuals, directly involved in the operational part/running the CBOs;

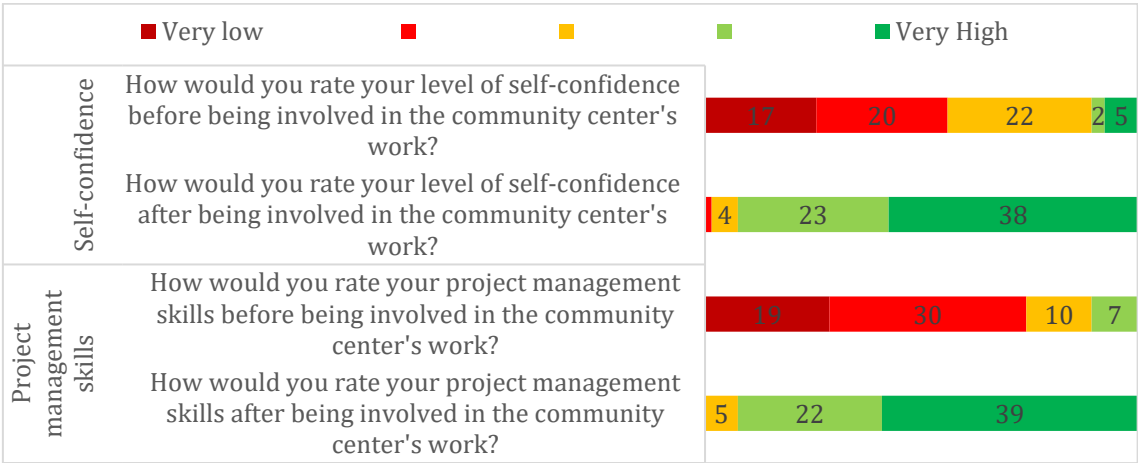
And

Individual beneficiaries of the activities, implemented by the CBOs.

Based on the analysis of all the available data, we identified the following types of resilience-building:

- 1) Increased level of self-esteem and self-confidence: the leaders of the organizations and the beneficiaries specifically indicated that thanks to participation in the CBOs’ activities on different levels, they became more confident in engaging in new activities, more aware of what they are able and capable of doing, in trying new things and being confident that they can achieve the planned results. The impact of being involved in the activities of the CBOs on increasing self-confidence was visibly demonstrated in the quantitative survey – 38 CBO leaders stated that their level of self-confidence is very high now that they are involved in the activities of the CBOs, compared to only 5 respondents, that felt the same way before joining the CBO activities.

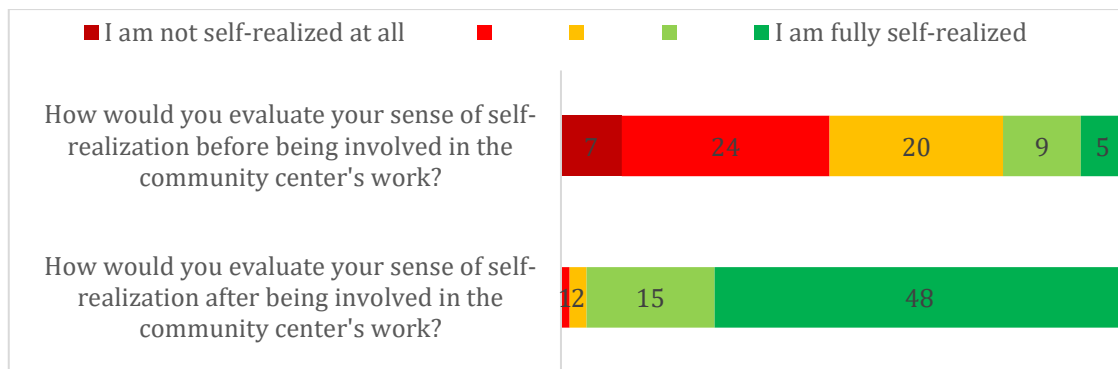
Figure 1: Self-Confidence and Self-assessment of project writing skills before and after being involved in the CBOs’ work (Frequencies)



Source: own source

- 2) Increased sense of self-realization: both groups stressed that they feel more self-realized by engaging in activities that bring a change even if it is on a rather small scale. Seeing the fruits of their work and the impact that they can make on the individual and community levels boost their motivation and determination to move forward. Only 7 out of surveyed leaders of CBOs in the quantitative survey, stated that they felt self-realized before engaging in the activities of the CBO. To compare, 48 CBOs’ leaders stated that now that they are engaged in CBOs’ activities, they feel fully self-realized.

Figure 2: Sense of self-Realization before and after being involved in the CBOs' work (Frequencies)



Source: own source

- 3) Improved/development of skills and knowledge: Both quantitative and qualitative component results showed that community leaders improved their practical skills through participation in various capacity-building activities organized by various donor organizations. Specifically, community leaders mentioned learning /developing organizational management techniques, improving project-writing skills; learning how to effectively implement the projects, and how to conduct monitoring and evaluation or needs assessments. The main progress has been highlighted in improving and/or acquiring effective communication and presentation skills, which are crucial when it comes to working with different stakeholders, donors, and partners, and especially, local self-administrations in municipalities, which are not always open and welcoming towards the activities of the non-governmental organizations. Also, non-formal and informal learning opportunities provided by the CBOs positively affected the individual resilience of beneficiaries. Our findings demonstrate that the CBOs helped community members to improve their knowledge in various fields by attending learning events and workshops. Community members learned new skills and improved existing knowledge in various fields such as tourism, agriculture, ecology, art, and handicraft. More importantly, some reported that they used new knowledge and skills in practice: some of the beneficiaries found a new job, some became entrepreneurs, and some applied to universities or colleges.
- 4) Increased social capital: The CBOs established safe and open spaces where individuals can meet and not only engage in various activities but also simply network and exchange ideas. The offices of community organizations often are the only meeting points in the communities. Hence, they also contribute to the increased social and cultural capital of the beneficiary community members.

To conclude, activities of donor organizations aimed at strengthening and building the resilience of local communities through strengthening local CBOs contributed to increased resilience on the individual level: leaders, staff members, volunteers, and beneficiaries have an improved sense of self-confidence – knowing what they can do, how they

can do, whom they can engage in when faced with different types of challenges. They exhibit a high level of agency and resilience to effectively address and mitigate the crises both on individual and community levels.

### **Community resilience**

Our findings however confirmed that increased individual resilience is not directly translated into increased resilience on the community level. Rather, communities at large remain passive recipients of the work that CBOs undertake and, in many ways, benefit from their activities. Some of the areas where communities benefited from the CBOs are improved infrastructure, technological innovations, and increased economic and learning opportunities. Also, in those communities where CBOs work, direct beneficiaries of the CBOs had higher social capital and stronger social and intercultural cohesion: participants also reported that community organizations encouraged them to engage in social activism.

Nevertheless, the communities are still vulnerable and they are far from being resilient communities as they are dependent on the ‘heroic’ effort of individuals. Our findings indicate that communities themselves could not manage to generate an agency to act, learn, recover, and grow. The main challenges can be summarised in the following obstacles:

- 1) Lack of pro-active involvement and engagement: Communities, while benefitting from the activities of CBOs, remain disengaged when it comes to active involvement in the project activities, even when these activities are of the direct benefit of the population. In many cases, CBO leaders spoke about difficulties finding volunteers or in-kind contributors or securing additional funding from the local population to implement certain activities. Men’s inclusion and involvement remain even more problematic in some cases.
- 2) Limited outreach due to limited resources – both financial and human: on average, the number of full-time CBO employees is around 3 individuals, and the number of volunteers is 10 individuals. On average, CBOs’ funding was about 17,200.00 GEL annually (4,526 EUR) (Margvelashvili et al., 2022) – and sometimes, with the limited focus, CBOs are unable to effectively engage some parts of community members. One of the specific gaps in this regard is also connected with the limited information outreach and visibility: CBOs are unable to effectively disseminate information neither about their activities and initiatives nor about the results they achieve. This creates a vicious circle when relatively few individuals in the community know about the existence of the CBOs as such, and their activities, consequently. This also often means that community members lack a sense of ownership on the one hand and that CBOs are rather associated with their leaders as such and the activities implemented referred as to implemented not by the CBOs, but by the leaders on the other hand. Sometimes even beneficiaries could not recall the names and basic details about the organizations, and they also used the leaders’ names to refer to the CBOs. The same was true in the case of local self-government officials. The interviews with the local self-government representatives illustrated

that public officials better knew the leaders than the organizations themselves. This practice is similar to the above-mentioned heroic understanding of the leaders which was criticized by societal resilience theories (Estêvão et al., 2017).

- 3) Certain ingenuity of CBO resilience building approach: The majority of community organizations we surveyed are not bottom-up projects as they were mostly established by the donor organizations and were and continue to be dependent on donor funds. Their main source of income remains international and local donors: even agendas and activities often come from the donors and not from the communities, although they do conduct annual local needs assessments, they still work within the agenda set by the donor organizations. In other words, CBOs and the communities in these settings are rather reactive and not-proactive agents of change and lack the ability to self-mobilize to make a joint action.
- 4) Outmigration of the agents of change: One of the unintended consequences of CBO activities that we observed is that as a result of increased self-motivation, self-confidence, and capacities, some of the beneficiaries of CBOs' activities tend to, later on, leave their communities to continue their studies at the universities/VET schools, or find better jobs, eventually, leaving their communities, that often provide fewer and more limited development and employment opportunities than bigger urban centers. Not being able to retain existing human capital in the communities then further limits its opportunities for building up on already existing resources and increasing its resilience.
- 5) Weak organizational structures of CBOs: A strong leader is an important asset for an organization, but only if the CBO has a strong and sustainable organizational form. Many of the CBOs we surveyed lack a strong institutional set-up and they need to be strengthened institutionally to better contribute to building community resilience. Otherwise, often, when the leader leaves the CSO, the organizations also cease to function.
- 6) Lack of trust: This challenge seems to be one of the most important ones for the Georgian context, and presumably, still connected with the soviet-type legacies. The level of trust in various organizations and actors both on national and local levels, especially in NGOs and the government remains quite low (CRRC, 2019) throughout the country. Also, our quantitative survey results indicated that at the beginning when the CBOs were established, attitudes towards the CBOs among community members were not positive. Although they changed with time, the need to first build trust and bridges and then maintain them with different groups of the community could be a challenging, and not always a successful task to achieve.

## Summary

Our findings suggest that in the Georgian context, community resilience is not simply a matter of having resilient individuals. It is not always a matter of having strong organizations in place either. We argue that social resilience can also be influenced by economic, political, and historical legacies. In the Georgian case, the 30 years after independence proved to be full of different types of crises and conflicts, political instability, and security threats that impacted the level of social cohesion in the country. Thus, no wonder that building social resilience is a greater challenge here, than in the communities that exhibit strong cultural and social cohesion.

Obviously, not all the reasons discussed above are present in all the communities we surveyed – however, in all the 20 communities that we investigated in-depth, we could not detect the capacity of the communities themselves to effectively identify the challenges and being able to mobilize themselves without the leadership and guidance of the CBOs and their leaders.

There is an interplay between individual and community resilience. One of the ways how individual resilience could contribute to community resilience is through the process of social learning and the formation of social support networks. In the first case, community members observe and learn from the experience of others and adopt similar strategies when it comes to coping with challenges. In the latter case, individuals, with strong resilience may serve as reference points and reach out to others to provide support to those who are struggling.

However, our general conclusion holds that the lack of social capital, poor economic development, the constant struggle to retain qualified individuals and increase community competencies due to both internal and international migration, and lack of access to the latest information and communication technologies – all these factors contribute to the difficulties of community resilience-building processes in Georgia (Norris et al., 2008). We argue that at the same time, lack of cooperation between the local self-government which also stems from the limited success of the decentralization reform in Georgia, is one of the major obstacles that hinder community resilience-building in Georgia. Unless the local self-governments take their share of the responsibility to perform the competencies and roles of the local self-government, CBOs alone with as much donor and/or community support as possible will not be able to achieve sustainable results. Only the unified and coordinated efforts from both the government and civil society organizations to invest in and maintain infrastructure development, local capacity development, trust-building and social cohesion, and economic/employment opportunities can become forces for development and prosperity for Georgian rural communities.

Thus, although our conclusions remain the same, and with our study being the first attempt to look at the individual and community resilience in the Georgian context, we believe that more in-depth research needs to be done to define the strategies and modalities of interventions at the community levels that could be implemented to not only contribute to the increased individual but community resilience as well.



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*Khaliunaa Bayarsaikhan*

*THE CONTEMPORARY MONGOLIAN CULTURAL LANDSCAPE:  
CULTURAL INFLUENCES, LANGUAGE SKILLS, AND THE IMPACT OF  
FOREIGN CULTURES*

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**Abstract**

This article examines the contemporary Mongolian cultural landscape and explores the influence of foreign cultures on Mongolian youth. The study investigates the effects of foreign cultural dominance on Mongolian language proficiency, traditional Mongol script skills, and the appreciation of the mother tongue. Additionally, the article delves into the impact of Korean bubble-culture, social media platforms, Hollywood movies, Japanese anime, and capitalist art on Mongolian youth, with a focus on their potential for escapism and desensitization. Furthermore, the article discusses the clash between traditional Mongolian cultural values and those of dominant foreign cultures, and the resultant devaluation of Mongolian cultural heritage. Ultimately, the study aims to shed light on the challenges and potential alienation faced by Mongolia's cultural landscape.

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*Keywords: Mongolian youth; cultural influences; cultural values*

**Introduction**

The contemporary Mongolian cultural landscape is a dynamic and evolving entity that is increasingly influenced by foreign cultures. As globalization expands and technology connects people from different parts of the world, the influx of foreign cultural influences has become more prominent in Mongolia. This article aims to shed light on the potential consequences of this cultural phenomenon, particularly the emergence of cultural alienation among Mongolians.

Cultural alienation refers to the disconnection or estrangement individuals may feel from their own cultural heritage and values due to the overwhelming influence of foreign cultures. In a rapidly changing world, it is crucial to understand the impact of these foreign cultural influences on the social fabric of Mongolian society.

Cultural literacy plays a vital role in addressing this issue. By fostering cultural literacy, individuals can develop a deeper understanding and appreciation of their own cultural heritage while engaging with and respecting the cultures of others. This article underscores the significance of cultural literacy in navigating the contemporary Mongolian cultural landscape. Foreign cultures, ranging from Western to East Asian influences, have exerted a substantial impact on the traditions, language skills, and cultural values of Mongolian youth. It is essential to examine how these influences shape the attitudes and behaviors of young Mongolians towards their own culture and language.

In light of these factors, this article seeks to explore the multidimensional aspects of the contemporary Mongolian cultural landscape. By delving into the issues of cultural alie-

nation and the need for cultural literacy, it aims to provide valuable insights into the challenges and potential solutions for preserving and nurturing Mongolian cultural heritage in an increasingly globalized world. In the subsequent sections, this article will delve into empirical research and analyses to investigate the influence of foreign cultures, such as the Korean bubble-culture, social media, Hollywood movies, Japanese anime, and capitalist art, on Mongolian youth. It will also examine the clash of cultural values and the potential devaluation of Mongolian cultural heritage in the face of dominant foreign cultures. Through this comprehensive exploration, we hope to enhance our understanding of the contemporary Mongolian cultural landscape and propose strategies for promoting cultural appreciation, preserving cultural values, and countering cultural alienation.

## **Influence of foreign cultures on Mongolian youth**

### **Foreign cultural dominance and language skills**

The influence of foreign cultures, particularly Western and East Asian influences, has significantly impacted the language skills of Mongolian youth. (Enkhtur & Wurm, 2016) This subsection aims to explore the relationship between foreign cultural dominance and the decline in Mongolian language proficiency and traditional Mongol script skills. Over the years, Mongolia has witnessed an increasing prevalence of foreign languages and cultures due to globalization and technological advancements (Smith & Li, 2019). This has led to a shift in the linguistic landscape, with more emphasis placed on learning and using foreign languages, such as English, Korean, and Chinese. As a result, the fluency and command of the Mongolian language among the younger generation have faced challenges.

One contributing factor to the decline in Mongolian language skills is the growing exposure to and popularity of foreign media, including movies, TV shows, and music. With the widespread availability of international entertainment platforms, Mongolian youth are increasingly consuming content primarily produced in foreign languages (Purevjav & Byamba, 2019). As a consequence, their exposure to and immersion in foreign languages has surpassed their engagement with the Mongolian language. Moreover, the dominance of foreign cultures has resulted in a shift in cultural preferences and values. As young Mongolians engage more with Western and East Asian cultures, there is a tendency to prioritize the learning and adoption of foreign languages over the preservation and development of their mother tongue. This shift in focus has had a direct impact on the language skills of Mongolian youth (Damba, 2016).

Furthermore, the decline in traditional Mongol script skills is another concerning aspect. The traditional Mongol script, which holds significant historical and cultural value, is gradually being overshadowed by the increasing prominence of Latin script and other foreign writing systems (Grivelet, 1995). The lack of emphasis on traditional script education and the limited exposure to written materials in Mongolian script contribute to a decline in the ability to read and write in the traditional script among the younger generation.

## **Korean Bubble Culture and its effect on Mongolian youth**

Korean bubble-culture, encompassing K-dramas and K-pop, has emerged as a powerful influence on Mongolian youth. Korean dramas, with their captivating storylines and relatable characters, have gained immense popularity among Mongolian youth. These dramas often depict idealized narratives of romance, friendship, and personal growth, which resonate with the emotional experiences and aspirations of the audience (Nomindari & Lee, 2016). As a result, young Mongolians find themselves drawn to the Korean drama culture, often admiring and attempting to emulate the lifestyles and behaviors of the characters they see on screen (Enkhtur, 2018).

In addition to dramas, K-pop music and its accompanying music videos have made a significant impact on Mongolian youth. K-pop groups, such as BTS and Black Pink, have a massive following in Mongolia, with their music and performances garnering widespread admiration. This admiration extends beyond just the music itself, as young Mongolians often try to emulate the fashion, style, and looks of their favorite K-pop stars (Cho, 2019).

The influence of Korean bubble-culture goes beyond mere entertainment consumption. It has also led to the adoption of Korean language learning as a trend among Mongolian youth. Korean language institutes and courses have seen a rise in demand, driven by the desire to better understand and connect with Korean media and culture (Batsukh et al., 2016).

The fascination with Korean bubble-culture among Mongolian youth can be attributed to several factors. Firstly, Korean media presents a refreshing alternative to the dominant Western cultural influences, offering a unique cultural perspective that resonates with Mongolian youth. Secondly, the emotional storytelling, attractive aesthetics, and relatable characters in Korean dramas and music create a sense of escapism and identification for the audience (Ju & Lee, 2015). Lastly, the strong online presence of K-pop fandoms and fan communities allows for a sense of belonging and interaction, further reinforcing the influence of Korean bubble-culture.

The dominance of foreign cultures, such as Western and East Asian influences, has significantly impacted the language skills of Mongolian youth. The decline in Mongolian language proficiency and traditional Mongol script skills can be attributed to the increasing prevalence of foreign languages and cultures. Moreover, the influence of Korean bubble-culture, particularly K-dramas and K-pop, has led to the emulation of lifestyles, fashion, and mannerisms among young Mongolians. These cultural phenomena highlight the transformative power of foreign cultures on the younger generation and their cultural preferences and behaviors.

## **The impact of social media and multinational corporations**

### **Addiction to social media and diminishing attention spans**

Social media has become an integral part of the daily lives of Mongolian youth, shaping their behaviors, preferences, and social interactions (Dash & Gantumur, 2020). The accessibility and popularity of platforms like Facebook, Instagram, and TikTok have resulted in a significant portion of the youth population dedicating substantial amounts of time to

scrolling, posting, and engaging with online content. The addictive nature of social media platforms poses challenges to the attention spans of Mongolian youth (Oyungerel & Sharavdorj, 2021). The constant exposure to an overwhelming amount of information, combined with the instant gratification provided by likes, comments, and notifications, has contributed to shorter attention spans and reduced ability to concentrate on tasks that require sustained focus. Furthermore, the curated and algorithmically personalized content on social media platforms often creates echo chambers, reinforcing existing beliefs and limiting exposure to diverse perspectives. This echo chamber effect can lead to a narrow worldview and limited critical thinking skills among the youth. The impact of social media addiction on mental health is also a concern. Excessive use of social media has been associated with increased levels of anxiety, depression, and loneliness among young individuals. The constant comparison to idealized versions of others' lives portrayed on social media can create unrealistic expectations and contribute to feelings of inadequacy.

### **Influence of multinational corporations on cultural preferences**

Multinational corporations, such as Facebook, Instagram, and TikTok, wield significant influence over cultural preferences and trends among Mongolian youth. These platforms are not just communication tools; they also function as gatekeepers of cultural content, promoting certain aesthetics, lifestyles, and consumer behaviors (Densmaa et al., 2021). Multinational corporations leverage their algorithms and advertising strategies to shape and manipulate the content consumed by users (Couldry & Mejias, 2019). They use sophisticated data analytics to understand user preferences and target specific demographics with tailored advertisements and sponsored content. This targeted approach plays a crucial role in shaping the cultural preferences and consumer choices of Mongolian youth. Moreover, the presence of multinational corporations in the advertising industry further amplifies the influence they have over cultural trends (Arvidsson, 2019). Advertising campaigns by global brands, often featuring international celebrities and influencers, have a pervasive impact on the consumption patterns and aspirations of Mongolian youth. The promotion of Western and East Asian fashion, beauty standards, and consumer products through these campaigns can lead to a shift in cultural values and preferences. The dominance of multinational corporations also raises concerns about the commodification and commercialization of culture (Nergui & Jargalsaikhan, 2018). As cultural content is increasingly driven by profit motives, there is a risk of diluting authentic cultural expressions and promoting superficial and commercialized representations of culture (Tumurbaatar & Tsolmon, 2017). Social media platforms and multinational corporations exert significant influence over Mongolian youth (Narangerel & Ayush, 2019). The addiction to social media and its impact on attention spans, as well as the targeted content and advertising strategies employed by multinational corporations, shape cultural preferences and consumer behaviors. Recognizing and critically engaging with these influences is crucial for preserving cultural integrity and fostering a balanced approach to the consumption of media and cultural content.

## **Hollywood movies and television series: Artistic substance vs. commercial appeal**

### **The dominance of Hollywood and Marvel movies**

Hollywood movies and television series have a significant presence in the global entertainment industry, including Mongolia. These productions, with their massive budgets, advanced special effects, and star-studded casts, have a wide reach and captivate audiences worldwide, including Mongolian youth. Within Hollywood, Marvel movies have gained immense popularity among Mongolian youth. The Marvel Cinematic Universe (MCU), with its interconnected storyline and diverse range of superheroes, has created a cultural phenomenon (Brooker, 2012). The franchise's films, known for their action-packed sequences and high-stakes narratives, often prioritize spectacle and entertainment value over deeper thematic exploration (Newman, 2008).

One key aspect of Hollywood movies and television series is their commercial appeal. These productions are designed to attract large audiences, generate significant revenue, and maximize profits (Purevdorj & Enkhsaikhan, 2017). As a result, there is often an emphasis on creating mass-market appeal, relying on familiar formulas, and delivering visually stunning spectacles to attract viewers. This focus on commercial appeal can sometimes come at the expense of artistic substance. While Hollywood movies and television series can be entertaining and visually impressive, they may lack the depth and artistic exploration that can be found in works of art that address the human condition and offer cultural insights (Dorjgotov & Bolorchimeg, 2018).

Engaging with works of art that delve into the complexities of the human experience, challenge societal norms, or provoke thought and introspection can provide a deeper understanding of cultural values and foster critical thinking among young individuals. However, the dominance of Hollywood productions, with their emphasis on commercial success, may limit exposure to such artistic works.

The consumption of Hollywood movies and television series, particularly those with less artistic substance, may have several consequences for Mongolian youth. Firstly, these productions can become a major part of their media consumption, occupying a significant amount of their time and attention. This can potentially distract them from engaging with other forms of art that offer more nuanced insights into the human condition (Kubrak, 2020).

Moreover, the prevalence of Hollywood movies and TV series may contribute to a homogenization of cultural tastes and preferences among Mongolian youth. The dominant influence of Western narratives and aesthetics can overshadow local and traditional cultural expressions, leading to a potential loss of unique cultural perspectives and identities (Maisuwong, 2012). Additionally, the focus on commercial appeal in Hollywood productions may perpetuate certain stereotypes and cultural biases. These portrayals can shape the perceptions and understanding of different cultures, including Mongolian culture, often simplifying or misrepresenting them for the sake of mass-market appeal.

## **Balancing commercial entertainment and artistic substance**

It is essential to strike a balance between consuming commercial entertainment and engaging with works of art that offer deeper artistic substance. Encouraging young individuals to explore a diverse range of cinematic experiences, including independent films, art-house productions, and culturally significant works, can broaden their perspectives and deepen their understanding of the human condition.

Promoting film festivals, cultural events, and educational programs that showcase a variety of films from different cultural backgrounds can foster a more diverse and inclusive media landscape. By exposing Mongolian youth to a broader range of artistic expressions, they can develop a discerning and critical eye, appreciating the value of works that go beyond mere commercial appeal.

Hollywood movies, television series, and specifically Marvel movies have a significant influence on Asian youth (Zhu et al., 2021). The emphasis on commercial appeal in these productions may divert attention from works of art that offer artistic substance and cultural insights. It is crucial to encourage a balanced media consumption approach that includes a variety of cinematic experiences, fostering appreciation for both commercial entertainment and works that address the human condition.

## **Japanese anime and manga: Escapism and disconnect from reality**

### **Influence of Japanese anime and manga**

Japanese anime and manga have gained immense popularity among Mongolian youth, captivating them with their unique storytelling styles, distinct visual aesthetics, and diverse range of genres. Anime refers to animated television shows and movies, while manga refers to Japanese comic books or graphic novels. One prominent aspect of anime and manga is their ability to provide an immersive and fantastical experience. They often feature elaborate and imaginative worlds, compelling characters, and intricate storylines that transport viewers and readers into extraordinary realms beyond their everyday lives (Ganbold & Odonchimeg, 2019). This escapism is particularly appealing to Mongolian youth, who may seek respite from the realities and challenges of their own lives.

The appeal of Japanese anime and manga as a form of escapism can potentially lead to a disconnect from reality among Mongolian youth. The captivating narratives, relatable characters, and visually appealing artwork can create a sense of refuge from real-world responsibilities, stress, and social interactions (Ochirbat & Tumur-Ochir, 2018).

This escapism can manifest in different ways, such as spending excessive amounts of time consuming anime and manga content, developing emotional attachments to fictional characters, and prioritizing virtual relationships over real-life connections (Gereltsetseg & Batjargal, 2020). The allure of the 2D world can sometimes overshadow the importance of engaging with the complexities and nuances of real-life experiences.

Japan has experienced similar cultural phenomena related to anime and manga, where individuals form emotional connections with fictional characters and objects (Galbraith, 2019). For example, some people in Japan have expressed a romantic or emotional attachment to pictures, holograms, and even humanoid robots. These instances highlight

the potential consequences of extended escapism and the blurring of boundaries between fiction and reality (Allison, 2013). While it is essential to recognize the appeal and positive aspects of anime and manga, such as fostering creativity and imagination, it is also crucial to address the potential negative impacts. Excessive reliance on escapism and a preference for virtual relationships over real-life connections can hinder personal development, social interaction skills, and the ability to navigate real-world challenges (Nakamura, 2018).

### **Promoting a balanced approach**

To mitigate the potential negative effects of anime and manga on Mongolian youth, it is vital to promote a balanced approach to media consumption. Encouraging critical engagement and media literacy can help young individuals discern between fiction and reality, understand the limitations of escapism, and appreciate the value of real-life connections and experiences (UNESCO, 2011). Furthermore, providing opportunities for cultural exchange and exposure to a diverse range of artistic expressions can broaden their horizons beyond the realm of anime and manga. This can include exploring traditional Mongolian art forms, engaging with literature and cinema from different cultures, and participating in activities that foster real-world connections, such as sports, hobbies, and community involvement. Japanese anime and manga have a significant impact on Mongolian youth, often serving as an avenue for escapism. It is crucial to address the potential consequences of extended escapism and a preference for 2D images over real-life interactions (Yamada, 2017). By promoting a balanced approach to media consumption and encouraging engagement with a diverse range of cultural experiences, we can help young individuals navigate between the allure of fantasy worlds and the realities of their own lives.

### **Critique of modern capitalist art: Theodor Adorno and Max Horkheimer's perspective**

#### **The culture industry and profit-driven art**

Theodor Adorno and Max Horkheimer, prominent members of the Frankfurt School, developed a critical theory of the culture industry. They argued that in capitalist societies, art and culture have become commodified, serving primarily as a means of profit generation rather than vehicles for genuine artistic expression and exploration.

According to Adorno and Horkheimer, the culture industry refers to the mass production and dissemination of cultural products, such as movies, music, and literature, that conform to standardized formulas and appeal to mass audiences. They contended that under capitalism, artistic production becomes subsumed by profit motives, resulting in the creation of works that prioritize marketability and entertainment value over artistic substance (Adorno & Horkheimer, 2002).

One of the central criticisms put forth by Adorno and Horkheimer is that capitalist art tends to prioritize commercial success and mass appeal, often sacrificing artistic depth and critical engagement. This phenomenon can be observed in the contemporary Mongo-



lian cultural landscape, where the dominance of certain foreign cultures, such as Hollywood movies and popular music, may overshadow locally produced artistic works that address profound human experiences (Demberel & Dashdorj, 2020). The drive for profit and marketability can lead to the production of formulaic, predictable, and superficial cultural products that cater to mainstream tastes. This commodification of art can limit the diversity of artistic expressions and marginalize alternative or challenging perspectives (Dissanayake, 2008). As a result, the cultural landscape may become saturated with works that lack artistic innovation, critical thought, and exploration of complex themes.

The proliferation of profit-driven art in the contemporary cultural landscape may have significant implications for cultural values and art appreciation. Adorno and Horkheimer argued that the culture industry promotes conformity, consumerism, and the suppression of critical thinking. This can contribute to a devaluation of artistic craftsmanship, creativity, and works that offer profound insights into the human condition (Adorno & Horkheimer, 2002).

In the context of Mongolia, the prevalence of commercially driven cultural products, such as mainstream Hollywood movies or music designed for mass consumption, may overshadow traditional artistic forms and cultural values. The allure of easily accessible, commercially produced entertainment can divert attention away from works that offer cultural preservation, promote local artistic traditions, and address the complexities of Mongolian society and identity.

### **Promoting artistic substance and cultural critique**

To counteract the influence of profit-driven art and promote artistic substance, it is crucial to cultivate a critical appreciation of art among Mongolian youth. Encouraging engagement with works that challenge established norms, provoke thoughtful reflection, and address social and cultural issues can foster a more meaningful and intellectually stimulating cultural landscape (Bourdieu, 1993).

Furthermore, supporting local artists and cultural initiatives that prioritize artistic exploration and innovation can help in cultivating an environment that values artistic substance over profit-driven commercialism. This can involve providing platforms for independent artists, promoting art education, and facilitating cultural exchange programs that celebrate diverse artistic expressions. The critique of modern capitalist art through the perspective of Theodor Adorno and Max Horkheimer sheds light on the challenges posed by profit-driven cultural production. The prioritization of profit over artistic substance may impact cultural values and appreciation of art. Recognizing the influence of the culture industry in the contemporary Mongolian cultural landscape and fostering a critical engagement with art can help preserve and promote artistic depth and cultural vitality.

## **Desensitization and escapism**

### **Media saturation and desensitization**

Mongolian youth are exposed to a vast array of media content from both local and global sources. The proliferation of television shows, movies, music, and online platforms inundates them with a constant stream of information and imagery. This saturation of media can lead to desensitization, wherein individuals become less emotionally responsive or affected by the content they consume. Desensitization occurs due to repeated exposure to graphic or intense media content, such as violence, explicit imagery, or sensationalized news (Bushman & Anderson, 2009). Over time, the emotional impact of such content diminishes, resulting in a reduced ability to empathize or respond emotionally to real-life situations (Huesmann & Taylor, 2006). This desensitization can create a psychological barrier, making it challenging for individuals to fully engage with the complexities and nuances of their own experiences and the world around them.

The saturation of media and desensitization can contribute to a disconnect from reality among Mongolian youth. The constant exposure to idealized or dramatized representations of life, often prevalent in popular culture and media, can create unrealistic expectations and distort perceptions of reality. This can lead to a detachment from the authentic experiences and challenges of everyday life. Moreover, the constant stream of media content can distract individuals from fully engaging with their immediate surroundings and personal relationships. The allure of virtual realities, presented through social media platforms, online games, or entertainment media, can draw attention away from genuine human connections and real-life experiences (Turkle, 2012).

In response to the pressures and complexities of reality, some Mongolian youth may turn to escapism as a coping mechanism (Tungalag & Gantuya, 2019). Escapism refers to the tendency to seek refuge in alternate realities, such as fictional narratives, virtual worlds, or daydreaming, as a means of avoiding or temporarily alleviating stress, anxieties, or dissatisfaction with reality (Gabbiadini et al., 2021).

The availability of various forms of media, including Japanese anime, Korean dramas, or fantasy literature, provides an abundance of escapist content for young individuals. These alternate realities offer a temporary respite from the challenges of daily life, allowing individuals to immerse themselves in narratives or experiences that provide comfort, excitement, or a sense of control.

### **Balancing media consumption and reality**

While media consumption can offer entertainment, inspiration, and cultural exposure, it is crucial to strike a balance to mitigate the negative consequences of desensitization and escapism. Promoting media literacy and critical thinking skills among Mongolian youth can help them navigate and analyze media content more discerningly (Ganzorig & Gombo, 2017). Encouraging a diversified media diet that includes works of art, literature, and cultural productions that address the human condition and offer meaningful insights can foster a deeper connection to reality. This can involve providing access to diverse cul-

tural offerings, supporting local artistic endeavors, and promoting engagement with thought-provoking content that encourages critical reflection. Furthermore, promoting real-world experiences, such as outdoor activities, community engagement, and face-to-face interactions, can help Mongolian youth establish a balanced relationship with media and foster a stronger connection with the tangible realities of their lives. The saturation of media content and exposure to various cultural influences can potentially lead to desensitization and a disconnect from reality among Mongolian youth (Bayarmaa & Bolormaa, 2020). The inclination towards escapism can be seen as a coping mechanism. By promoting media literacy, critical thinking, and a balanced approach to media consumption, young individuals can navigate the complexities of media saturation while maintaining a strong connection to the realities of their lives.

## **Clash of cultural values**

### **Traditional Mongolian cultural values**

Traditional Mongolian cultural values are deeply rooted in the nomadic lifestyle, the importance of community and family, and a strong connection to nature and the environment. Values such as hospitality, respect for elders, loyalty, and a collective identity based on shared ancestry and heritage are integral to Mongolian society. These cultural values have shaped the social fabric of Mongolia for centuries, providing a sense of identity, cohesion, and resilience (Yembuu, 2016). Traditional Mongolian arts, music, and oral traditions have also played a significant role in preserving and transmitting cultural values across generations.

### **Imposition of foreign cultural values**

The contemporary Mongolian cultural landscape has been influenced by various foreign cultures, including Western and East Asian influences. Globalization, technological advancements, and increased connectivity have facilitated the spread of foreign cultural values, leading to their imposition and the dilution of traditional Mongolian values.

Foreign cultural values, such as individualism, consumerism, and materialism, may clash with the collectivist and communal values deeply embedded in Mongolian culture. The dominance of foreign cultural influences, particularly in media, entertainment, and consumer trends, can overshadow and erode traditional Mongolian cultural values (Bold & Chuluunbaatar, 2020).

The imposition of foreign cultural values can result in the devaluation of Mongolian cultural heritage. As the focus shifts towards embracing foreign cultural practices and ideologies, there is a risk of neglecting or undermining the significance of traditional Mongolian customs, language, arts, and rituals. This devaluation can be seen in various aspects of Mongolian society, such as the declining use of the Mongolian language or the erosion of traditional practices and knowledge related to nomadic herding, traditional medicine, and craftsmanship. As foreign cultural values become more dominant, there is a potential loss of cultural diversity and unique expressions of Mongolian identity (Meskell, 2015).

Preserving Mongolian cultural heritage requires a concerted effort to protect and promote traditional values and practices. It involves recognizing the importance of language preservation, supporting cultural education initiatives, and fostering pride in Mongolian heritage (Gantumur & Munkhbat, 2018). Efforts to preserve Mongolian cultural heritage can also involve creating spaces for traditional arts, music, and performances to flourish, as well as documenting and revitalizing traditional practices and knowledge. Emphasizing the value of traditional skills, craftsmanship, and environmental stewardship can also help maintain the connection to Mongolia's nomadic roots.

### **Balancing cultural influences**

While the clash of cultural values presents challenges, it is important to acknowledge that cultural exchange and influence can also bring positive aspects to Mongolian society. The integration of diverse cultural perspectives can enrich the cultural landscape, fostering creativity, tolerance, and innovation. Balancing cultural influences requires a nuanced approach that recognizes the value of both traditional Mongolian cultural values and those from foreign cultures (Battulga & Gonchigsuren, 2021). It involves promoting dialogue, understanding, and appreciation for different cultural perspectives while ensuring the preservation and revitalization of Mongolian cultural heritage. The clash between traditional Mongolian cultural values and foreign cultural influences poses challenges for Mongolian society. The imposition of foreign cultural values can lead to the devaluation of Mongolian cultural heritage. However, through a balanced approach that values cultural preservation, education, and dialogue, Mongolian society can navigate the tensions and embrace the positive aspects of cultural exchange.

### **Conclusion**

The influence of foreign cultures, particularly Western and East Asian influences, has impacted Mongolian youth in multiple ways. The dominance of foreign cultural values has contributed to a decline in Mongolian language proficiency and traditional Mongol script skills. Furthermore, the prevalence of Korean bubble-culture (Cozzi, 1998), such as K-dramas and K-pop, has led to the emulation of lifestyles, fashion, and mannerisms depicted in Korean media.

The rise of social media platforms and multinational corporations has also had a profound impact on Mongolian youth. The presumed addiction to social media and the diminishing attention spans of young people have contributed to a disconnect from real-life interactions. Additionally, the widespread consumption of Marvel movies, Hollywood films, and TV series with little artistic substance has captivated the youth, further distancing them from works of art that address the human condition. Japanese anime and manga have also left their mark on Mongolian youth, potentially leading to an escape from reality and a preference for 2D images over real-life connections. These phenomena mirror some of the challenges faced by modern Japan (Yamada, 2017), where people have formed emotional attachments to pictures, holograms, and robots (Bredikhina, 2022).

Drawing from the critical perspectives of Theodor Adorno and Max Horkheimer, this study has highlighted the dominance of modern capitalist art, which prioritizes profit over

artistic substance. The culture industry perpetuates a system that seeks financial gains rather than fostering artistic value and cultural exploration. This commodification of art may serve as a barrier to the appreciation of works that address the human condition.

The clash between traditional Mongolian cultural values and those imposed by foreign cultures has caused tension and potential cultural devaluation. The imposition of foreign cultural values can erode traditional practices, language usage, and the preservation of Mongolian cultural heritage. This clash underscores the importance of cultural preservation and the need to strike a balance between embracing cultural diversity and upholding the values that define “Mongolian” identity.

In light of the findings, it is crucial to prioritize cultural preservation and foster cultural literacy among Mongolian youth. Efforts should be made to promote the appreciation and understanding of traditional Mongolian cultural values, language, arts, and practices. This can be achieved through educational initiatives, cultural exchange programs, support for local artists, and the revitalization of traditional artistic expressions.

By safeguarding Mongolian cultural heritage and fostering cultural literacy, the nation can navigate the challenges posed by foreign cultural influences and ensure the preservation and appreciation of its unique cultural values. It is through these efforts that Mongolia can cultivate a vibrant cultural landscape that celebrates its rich heritage while embracing the benefits of cultural exchange in the globalized world. While the cultural landscape of Mongolia may face challenges and the specter of cultural alienation (Brannen & Fruin, 1999), there is hope in the recognition of these issues and the commitment to preserving and fostering cultural values and literacy. By embracing cultural diversity and upholding traditional Mongolian cultural values, Mongolia can navigate the complexities of globalization while ensuring the preservation and appreciation of its distinct cultural identity.

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*Susanne Vill*

## *INTERKULTURELLE SZENARIEN IN DEN PERFORMATIVEN MEDIEN ALS EYE-OPENER*

### Abstract

Der Text basiert auf einem soziologischen Blick auf die Behandlung von Interkulturalität im Theater und in der Mediengeschichte. Die transmediale Auswahl und Beschreibung stellt Präsentationen vor und diskutiert die Effizienz von inter- und transkulturellen Themen und Motiven in Aufführungen von Theater, Oper, Musical, in Filmen und TV-Serien. Im Theater und in den Medien können Fremde, Indigene und transhumane Figuren das Verständnis und die Akzeptanz von verschiedenen Kulturen fördern. Die Beispiele stammen aus einem Zeitraum von 500 v. Chr. bis heute und stellen Möglichkeiten der Medien dar, die Akzeptanz des Fremden in kulturellen Integrationsprozessen zu unterstützen.

*Schlüsselbegriffe: Kolonialismus; Performance; Vision*

### **Interkulturalität, Rassismus, Identität**

In unsrer vierdimensionalen Welt erkennen wir durch Dualität. Im Kontrast mit Eigenem wird das Andere als verschiedene Entität deutlich. Ähnlichkeiten erscheinen gefahrlos nach der Sozialisation eines Menschen in der Familie und Ethnie. Mit einem darin erstarkten Selbstbewusstsein kann Fremdes neugierig und fasziniert erkundet werden. Angst erweckt das Unbekannte, das umso gefährlicher erscheint, je mehr es sich vom Eigenen unterscheidet. Beängstigendes wird abgelehnt und in Feindbilder gefasst, wenn nicht Neugier und Faszination einen Zugang schaffen können.

Kriege, Imperialismus, Migration, Handel und Forschung konfrontieren mit fremden Kulturen und Menschen, wobei die mit anderer Hautfarbe, Augen- und Schädelform besonders fremd erscheinen. Imperialismus und Kolonialismus teilten Menschen in „Rassen“ ein, und nutzten Rassentheorien zur Verfolgung, Versklavung und Ermordung von Abermillionen von Menschen.

Als ein Hort demokratischer Werte gelten die USA, weil sie die Menschenrechte, Gleichheit, Freiheit und Streben nach Glück verbürgen in ihrer Unabhängigkeitserklärung. Dass aber die meisten ihrer Autoren selbst Sklavenhalter waren, dekonstruiert nach Omri Boehms *Radikaler Universalismus – Jenseits von Identität* (2022) ihre universalistischen Werte der Aufklärung als Heuchelei des weißen Mannes. Und wie verhalten sich die Verfassungen des weißen Europa zu seiner imperialistischen Welteroberung?

Nach Immanuel Kant wurden infolge der Aufklärung die Naturwissenschaften für die Quelle von Wahrheit gehalten, der Mensch wurde zu einem Objekt der Natur erklärt und konnte folglich auch besessen und beherrscht werden: eine theoretische Rechtfertigung für Kolonialismus und Versklavung, gestützt durch Immanuel Kants Konzept „Von den verschiedenen Racen der Menschen“, das 1755 in seinen *Schriften zur Physischen Geographie III. Die Allgemeine Naturgeschichte und Theorie des Himmels* bei Joh. Frdfl Petersen erschien.



Nach 1945 wurde der Rassismus zunehmend geächtet. 1948 bestätigte die UN-Menschenrechtserklärung den Anspruch aller Menschen auf individuelle Freiheit und Gleichbehandlung, ungeachtet der Herkunft (Vereinte Nationen 1948). 1950 widerlegte eine UNESCO-Arbeitsgruppe die biologistische Fundamentierung des Rassismus (Cremer, 2008). 1995 wandte sich eine weitere wissenschaftliche Arbeitsgruppe der UNESCO-Konferenz *Gegen Rassismus, Gewalt und Diskriminierung* gegen die Verwendungen des Begriffs ‚Rasse‘ zur Unterscheidung von Menschen (Stellungnahme zur Rassenfrage, n.d.).

Mit DNA-Sequenzierung archäologischen Knochenmaterials ermittelte Johannes Krause die Komponenten, die zur Bildung des heutigen Homo sapiens führten, und auch die Genprofile heutiger Populationen (Krause, 2020). 2019 schrieben die Evolutionswissenschaftler Fischer, Hoßfeld, Krause und Richter in ihrer *Jenaer Erklärung*: „Das Konzept der Rasse ist das Ergebnis von Rassismus und nicht dessen Voraussetzung. [...] Es gibt im menschlichen Genom unter den 3,2 Milliarden Basenpaaren keinen einzigen fixierten Unterschied, der zum Beispiel Afrikaner von Nicht-Afrikanern trennt. Es gibt [...] nicht nur kein einziges Gen, welches ‚rassische‘ Unterschiede begründet, sondern noch nicht mal ein einziges Basenpaar.“ (Fischer et al, n.d.)

Doch gewichtige Unterschiede bestanden weiterhin, denn die Flüchtlings- und Gastarbeiterdramen, „Black Lives Matter“, Femizide, Zwangsprostitution, „#Metoo“ und der Gender Pay Gap zeigen andere Wirklichkeiten. Als Ursachen der Diskriminierung wurden zunehmend kulturelle und soziale Lebensbedingungen erkannt, Armut und Bildungsdefizite, die in den wirtschaftlichen und politischen Systemen, Religionen und Weltanschauungen, Traditionen und Konventionen der Kulturen wurzeln. Der Kulturalismus argumentiert folglich mit Ab- bzw. Aufwertungen von Kulturen, die Ausgrenzung erklären, statt mit rassistischer Diskriminierung aufgrund vermeintlicher biologischer Ungleichheit.

Die Vereinten Nationen ermitteln für ihr Entwicklungsprogramm als Rangliste und Wohlstandsindikator der Staaten jährlich einen *Index der menschlichen Entwicklung* (Human Development Index/ HDI), der das Bruttonationaleinkommen, die Lebenserwartung und Ausbildung berücksichtigt (United Nations Development Programme, 2022b). Komplementär erscheint der ungleichheitsbereinigte Index der menschlichen Entwicklung (Inequality-adjusted Human Development Index/ IHDI), der die Ungleichheit in Bildung, Gesundheit und Einkommen erfasst und 2022 *Global Multidimensional Poverty Index MPI* (United Nations Development Programme, 2022a).

Wirkungsmächtige Blockaden für Verständnis, Kooperationsbereitschaft und friedliche Koexistenz sind Ideologien und Verschwörungstheorien, deren Propaganda mit Fake News u.a. mit Social Bots in den sozialen Medien verbreitet wird. Sie simplifizieren die Komplexität der diversen Lebensverhältnisse der vernetzten Welt, spiegeln Illusionen von Überschaubarkeit und Beherrschbarkeit vor und fördern Fanatismus, indem sie für Gleichgesinnte einen Gruppenzusammenhalt als Ersatz für Familienbande zu bieten vorgeben. Ihnen gegenüber erweisen sich Versuche wissenschaftsbasierter Aufklärung oft als wirkungslos.

Yuval Noah Harari (2019) fragte in *21 Lektionen für das 21. Jahrhundert*, welche Kulturen besser sind als andere, und welche Bewertungen der Kulturen sich durch Zuwanderungen ergeben – warum wollen Syrer lieber nach Deutschland als nach Saudi Arabien? Welche Bedeutung kommt der Herkunftsidetität zu, und was geschieht damit in der Konfrontation mit dem Fremdkulturellen? Wenn Glück neben dem Selbsterhaltungstrieb das wesentlichste Lebensziel ist, welche Lebensqualitäten der Kulturen gelten als erstrebenswert?

Für die Ausprägung von Identitäten, die Vermittlung des kulturellen Erbes und von Konventionen, kommt den performativen Medien eine Bedeutung zu, denn in der kulturellen Schutzzone von Theater, Film, Fernsehen und neuen Medien kann das Fremde betrachtet werden, ohne existenziell gefährlich zu werden (sieht man mal ab vom Suchtfaktor).

Die Begegnung mit Fremdkulturellem gehört sei je zu den Reizwerten öffentlicher Präsentationen. Multikulturelle Darstellungen trennen die Identitäten der beteiligten Kulturen, interkulturelle Darstellungen markieren Überschneidungen, wahren aber die fremden Identitäten, während transkulturelle die heterogenen Merkmale mit denen der eigenen Kultur vermischen und klare Konturen verwischen – so etwa in kulturellen Aneignungen.

In historischen Epochen und Regionen erscheinen Repräsentationen unterschiedlicher Kulturen abhängig von ihrer Integration in der Trägergesellschaft, und häufig wurden sie auch als Feindbilder zur Abgrenzung genutzt.

### **Fremdkulturelles in Theater und Performance**

Im antiken Griechenland wurden die feindlichen Perser (in Aischylos' Tragödie *Die Perser*) und die Zauberin Medea aus Kolchis (in Euripides' Tragödie *Medea*) als Wesen fremder Kulturen vorgestellt.

Die europäischen Imperialisten stellten in ihren Triumphzügen gefangen genommene Exoten aus, um ihre Macht zu demonstrieren. Die Römer präsentierten ihre Eroberungen in Triumphzügen und fremde Sklaven u.a. als Gladiatoren im Kolosseum. Der Titusbogen in Rom zeigt im Relief des Triumphzugs von 71 n. Chr. die Menora als Beute aus Jerusalem.

Das Theater ist ein Selbsterkennungsinstrument der Gesellschaft und ein Ort der Konstituierung und Selbstvergewisserung kultureller Identitäten. Seit dem 15. Jahrhundert betraten vermehrt Darsteller von Türken, Ägyptern, Mauren, Afrikanern, Indern, Chinesen, Indianern u.a. die europäischen Bühnen. Im Ballet du Cour des Sonnenkönigs und Ballettopern wie *Le Grand Bal de la Douairière de Billebahaut* (1626 im Louvre) oder Rameaus *Les Indes Galantes* wurden Angehörige fremder Kulturen vorgeführt. Der Exotismus wurde zu einer Mode, die bis heute interkulturelle Szenarien anbietet.

Eine Provokation inszenierten Coco Fusco und Guillermo Gómez-Peña:

Figur Nr. 1: *Two Undiscovered Amerindians Visit Madrid*, 1992. Performance.



Foto: Nancy Lytle © 2023 Coco Fusco / Artists Rights Society (ARS), New York, Courtesy Alexander Gray Associates, New York

Die Installation animierte 1992-1994 an zahlreichen Orten die Zuschauer, die „Exoten“ zu fotografieren und ihnen Bananen anzubieten. Die Trennung von Exponaten im Käfig und Betrachtern davor signalisierte, die Eingeschlossenen als gefährliche, „wilde“ Fremde anzusehen, doch ihre Ausstattung wies sie als Produkte teils kommerzialisierter, transkultureller Synthesen aus, was ihre Vorführung kritisch unterwanderte.

Die performativen Medien zeigen als Fremde nicht nur Indigene oder ihren Herkunftskulturen Entfremdete.

Viele Theaterformen wurzeln in religiösen Kulturen und zeigen auf den Bühnen auch Wesen aus anderen Dimensionen: Götter, Engel, Feen, Gestalten aus Sagen, Mythen, Märchen, Fantasy, Phantasmagorien und Geister, so etwa den Erdgeist in Goethes *Faust* und den Geist des ermordeten Königs Hamlet bei Shakespeare.

Nach Michail A. Čechov (1979) ist auch die Verkörperung einer Theaterfigur durch einen Schauspieler ein Spiel mit deren Geist.

Fotografien und Filme verbreiten auch Bilder, die die Horizonte in transzendente Bereiche öffnen. Die Kirlian- und Aura-Fotografie macht Unsichtbares sichtbar. Max Langridge veröffentlichte in *Die berühmtesten Geisterfotos, die je aufgenommen wurden* Erscheinungen von Geistwesen, wie ein bei einem Grab erschienenes Kind in *Frau Andrews Baby – 1947*. Der Geist wurde erst nach dem Entwickeln des Films sichtbar (Langridge, 2023).

Visualisierungen von Geistwesen, wie die Elfen in Max Reinhardts Verfilmung von Shakespeares *Sommernachtstraum*, sind als Visual Effects Garanten des Erfolgs der Fantasy.

Das Theater präsentiert den Zuschauern alternative Lebensformen in fremden Kulturen. Von den ungezählten Beispielen der Theatergeschichte können hier nur wenige angesprochen werden.

Lodovico Burnacinis *Maschere* (Entwürfe für eine Theateraufführung oder einen Hofball, um 1670) zeigen Fremde in nobilitierten, der zeitgenössischen lokalen Mode angepassten, ethnologisch aber realitätsfremden Dekorationen. Die Serie enthält Bilder von *Amerikanern, Türken, Mohren, Chinesen* und *Indianern*.

Fantastischer Orientalismus, der um 1900 von der Bühne auf die Mode übergriff und das Publikum in einen Exotismusrausch versetzte, kennzeichnet Leon Baksts Figurinen für die *Ballets Russes*, wie etwa Potiphar und sein Weib für Richard Strauss' *Josephsle-gende*.

William Shakespeare machte 1603 mit *Othello* einen Mauren zum Protagonisten einer Tragödie. Inspiriert hat ihn vermutlich Abd el-Ouahed ben Messaoud ben Mohammed Anoun, der Maurische Botschafter am Hofe Elizabeth I. Das Sujet des Mordes aus Eifersucht erfand ursprünglich Giraldi Cinthio für seine *Hecatommithi* zur Abschreckung vor falscher Partnerwahl. Bei Shakespeare jedoch wird mit Othello in plastischer Theatralität ein Farbiger zum Mörder einer Weißen.

Die südafrikanische Regisseurin Lara Foot hat Shakespeares *Othello* „dekolonialisiert“, verlagert in die Zeit der deutschen Kolonialisierung Afrikas und den Kampf gegen die Hereros. Während Shakespeares Othello sein früheres Leben nur erzählt, lässt Foot ihn seine eigene Geschichte in das Drama einbringen: Er hadert mit sich und seiner Anpassung an die westliche Gesellschaft. Den Protagonisten besetzte Foot mit dem Südafrikaner Bongile Mantsai und ließ das Stück in mehreren Sprachen spielen, auch übersetzen in die Bantusprache "isiXhosa".

## **Erkundung von Quellen**

Im 20. Jahrhundert erforschten Ethnologen und Theateranthropologen systematisch andere Kulturen und ihr Theater. Die Faszination für Indien motivierte Peter Brook, mit Jean-Claude Carrière, Marie-Hélène Estienne und Sanjukta Sharma das indische Epos *Mahabharata* aus dem Sanskrit zu übersetzen und zu dramatisieren. Die dreiteilige Theaterproduktion umfasste 1985 neun Stunden und wurde 1989 gekürzt verfilmt. Brooks multikulturelle Truppe spielte die Geschichte der Götterkinder der Pandavas und Kauravas, die infolge ihrer Spielerwette mit ihren, von Göttern verliehenen und gelenkten Waffen in einen totalen Vernichtungskrieg geraten.

In den Veden werden alles vernichtende Waffen und Vimanas als Flugmaschinen beschrieben, in denen in der Vorzeit „Götter“ vom Himmel kamen und in das Leben der Inder eingriffen. Da die Inder der Vorzeit keine Technologie von Fluggeräten kannten, beschrieben sie die Flugzeuge dieser „Götter“ als Vögel. Bilder zeigen Krishna und Satyabhama auf Garuda fliegen.

Auf einen Vernichtungskrieg vor über 4000 Jahren deutet ein nuklear verseuchtes Gebiet um Mohenjo-daro in Pakistan und eine erhöhte Strahlenbelastung in Indien hin<sup>1</sup>. Die Quellen wurden dokumentiert in der TV-Serie *Ancient Aliens* (USA 2009-2023, 220 Episoden, ca. 200 Stunden), die Zeugnisse prähistorischer Epochen vieler Kulturen präsentiert, die Fragen nach ihrer Herstellung aufwerfen. Mythen vieler Völker berichten von Göttern, die vom Himmel kamen und die Menschen lehrten. Die DNA des Homo Sapiens weist Spuren auf, die humangenetisch nicht erklärbar sind. Tausende Beobachter berichten von UFOs und Begegnungen mit extraterrestrischen Wesen. Die Serie zeigt Pyramiden, Monolithen, Geoglyphen, Skulpturen, archäologische Funde und Schriften der Sumerer, Ägypter, Inder, Mayas, Inkas, Chinesen, Japaner u.a. und lässt Wissenschaftler deren Provenienz erklären.

Eugenio Barba, Direktor des Odin Teatret, hat mit der International School of Theatre Anthropology (ISTA) und der Università del Teatro Eurasiano ein weltweites Forum interkulturellen Austauschs geschaffen, in dem Formen und Techniken der Darstellungskunst verschiedener Theaterkulturen erforscht werden. In der ISTA lernen die Darsteller und Musiker voneinander, erarbeiten interkulturelle Performances und laden auf ihren Weltreisen auch lokale Theatergruppen ein zum Tauschhandel, ihren *barters*, mit dem Motto: Wir zeigen euch, was wir haben, ihr zeigt uns, was ihr habt (Barba Varley Fondazione, n.d.). Einen vergleichenden Überblick über diverse Erscheinungsformen und Aktionstechniken verschiedener Theaterkulturen stellten Eugenio Barba und Nicola Savarese (2019) in *The Five Continents of Theatre: Facts and Legends about the Material Culture of the Actor* dar.

In vielen Kulturen sind Ekstasen wesentliche Ziele der Konzelebration. 1994 in Brasilien konfrontierte Eugenio Barba in *Orô de Otelo – A Ceremony for Othello* den brasilianischen Tänzer Augusto Omolú mit Giuseppe Verdis *Otello*. Er verkörperte den maurischen Feldherrn zum Opernduett *Otello – Desdemona*, das unterbrochen wurde von der *Dança dos Orixás*, die die brasilianische Combo begleitete. Die *Dança dos Orixás* repräsentiert männliche und weibliche Spirits der afrikanischen, in Brasilien enkulturierten Yoruba Religion. Der Tänzer wird in Trance zu einem Medium von Geistwesen. In der Aufführung bei der Session der ISTA *Tradition and Founders of Tradition* 1994 in Londrina, Brasilien, tanzte Omolú in seinen Trancen als Medium von Ogun und Oshun ohne Zeitlimit. Seine Musiker improvisierten ca. 20 Minuten lang, bis sein Wachbewusstsein zurückkam, und er wieder in die Choreografie zu Verdis Musik wechselte. – In Barbass *Ur-Hamlet* (Wroclaw 2009) verkörperte Omolú Hamlets Wahnsinn als Zeichen eines in der Globalisierung verlorenen, unbehausten Menschen.

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<sup>1</sup> Mohenjo-daro im History Channel: *Ancient Aliens: Atomic Explosion Wipes Out An Entire Civilization* (Season 3) (HISTORY, 2022), (00:09 Zugriff am 09.03.2023). In den Veden stehen Berichte von Kriegen mit nuklearen Waffen. P. C. Roy schrieb in seiner Übersetzung *The Mahabharata* (Calcutta 1891): „Die Sonne schien sich im Kreis zu drehen. Von der Glut der Waffe versengt, taumelte die Erde vor Hitze. Elefanten waren angebrannt und rannten wild hin und her... Das Toben des Feuers ließ die Bäume wie bei einem Waldbrand reihenweise stürzen... Pferde und Streitwagen verbrannten, es sah aus wie nach einem fürchterlichen Brand. Tausende von Wagen wurden vernichtet. [...] Die Leichen der Gefallenen waren von der fürchterlichen Hitze verstümmelt, sie sahen nicht mehr wie Menschen aus. [...] Die Waffe] ist wie ein strahlender Blitz, ein verheerender Todesbote, der alle Angehörigen der Vrischni und der Andhaka zu Asche zerfallen ließ. Die verglühten Körper waren unkenntlich. Den Davongekommenen fielen Haare und Nägel aus. Töpferwaren zerbrachen ohne Anlass, die überlebenden Vögel wurden weiß. In kurzer Zeit war die Nahrung giftig. Der Blitz senkte sich und wurde feiner Staub.“ (Däniken, 2001, p. 202.)

In Oper, Operette und Musical ist eine Entrückung der Akteure in Ekstasen und Trancen unmöglich, da die Sänger an die Orchesterbegleitung gebunden sind. Barrie Kosky (2021) beschreibt in *On Ecstasy* Ekstasen folglich eher als Rezeptionsphänomene, die sich im Theater am besten über Phantasmagorien transportieren. (p.55.)

### **Fremdes im Musiktheater**

Die Geschichte der Oper begann mit Interkulturalität, als die Camerata Fiorentina Motive der griechischen Mythologie aufgriff und anstelle der unbekanntenen Musik des antiken griechischen Theaters die zeitgenössische italienische Monodie einsetzte. In der Folge erwies sich, dass mit der Darstellung der Willkür fremder Herrscher sich die Willkür eigener Machthaber anprangern ließ.

Mozarts *Zauberflöte* imaginiert autoritäre Herrschaftsstrukturen mit Zeichen der ägyptischen Pharaonenkultur, des Männerbunds der Freimaurer, der Königin der Nacht als historisch orientierter Märchengestalt, einem gefiederten Vogelfänger und dem Schwarzen Monostatos.

Mozarts schwarzer Freund und Logenbruder Angelo Soliman war ein afrikanischer Freimaurer-Meister, der in den Initiations-Ritualen der Wiener Loge *Zur wahren Eintracht* als „Frère terrible“/ „Förchter“ mit plötzlichem Erscheinen den Initianten die Erfahrung der Todesnähe vermittelte. Diese Funktion war wohl auch Monostatos zugeordnet, der Pamina in Todesangst versetzen sollte (Southern Africa Documentation and Cooperation Centre, n.d.).

In der Oper allerdings wird Monostatos als Triebtäter rassistisch verunglimpft und vom angeblich so humanen Sarastro mit 77 Sohlenstreichen martialisch bestraft. Heutige Inszenierungen dieser weltweit beliebtesten und meist aufgeführten Oper haben folglich ein Problem mit der Political Correctness. Generell gilt in der Besetzungspraxis weitgehend noch, dass viele schwarze Sänger und Sängerinnen nicht für Partien von als Weiße konzipierten Figuren besetzt werden, während Weiße, auch mit Maske bzw. geschwärztem Gesicht, Figuren mit anderen Hautfarben verkörpern.

Eine teils interkulturelle, teils transkulturelle Inszenierung war Giacomo Puccinis *Turandot* in der Verbotenen Stadt in Beijing 1998<sup>2</sup>. Das gigantische Projekt des Maggio Musicale Fiorentino, Puccinis mit chinesischen Melodien durchsetzte Oper am Originalschauplatz aufzuführen, arbeitete mit einem chinesischen Regie- und Ausstattungsteam

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<sup>2</sup> 1998 gestattete die Regierung der Volksrepublik China eine Aufführung von Puccinis Oper *Turandot* vor dem Kaiserpalast der Verbotenen Stadt in Beijing durch das Teatro Comunale Fiorentino, in Kooperation mit einem chinesischen Regieteam: Der dreifache Oscarpreisträger Zhang Yimou führte Regie; die Gestaltung der Dekorationen in der Verbotenen Stadt und der chinesischen Kostüme übernahmen Gao Guangjian, Zeng Li, Huang Haiwei und Wang Yin, die Choreografie Chen Weiya. Die Partien der Gesangssolisten waren mit Italienern besetzt, Calaf alternierend und in der Filmaufzeichnung mit Sergej Larin. Die Regierung der Volksrepublik China übertrug die Musikalische Leitung dem indischen Dirigenten Zubin Mehta. Über 350 Chor- und Orchestermitglieder reisten aus Florenz an und wurden verstärkt durch chinesische Musiker, Tänzer und Statisten. Diese Inszenierung ist mit über 1000 Mitwirkenden und den prachtvollen Dekoration und Kostümen die aufwendigste und spektakulärste seit der Entstehung dieser Oper. Die Europatournee der Produktion mit den nachgebauten Kulissen der Verbotenen Stadt wurde zum Mega-Event: die Bühne, 170m breit und 43m tief, wog 700 Tonnen, Kostüme, Requisiten und 1200 Tonnen Technik, über 1000 Scheinwerfer kamen noch hinzu und bildeten das Volumen der größten Opernproduktion der Welt; eine 100.000 Watt Musikanlage ermöglichte die Beschallung der Sportarenen, in denen der Event gastierte (Vill, 2014).

unter dem Oscarpreisträger Zhang Yimou. Als Dirigenten wählte die Regierung der Volksrepublik China den Inder Zubin Mehta. Die Protagonisten, Chor und Orchester waren überwiegend Italiener, ergänzt wurden chinesische Musiker, Tänzer und Statisten.

Eine postdramatische Operninszenierung stellte Milo Rau mit *La clemenza di Tito* 2021 am Grand Théâtre de Genève vor. Mozart komponierte die Oper 1791 zur Krönung Kaiser Leopolds II. zum König von Böhmen. Milo Rau deutete sie als ein Werk, das im Volk Neigungen zu Aufständen besänftigen und in der Habsburger Monarchie eine Revolution wie die Französische verhindern helfen sollte. Rau brachte im Stil des dokumentarischen Theaters die heutige, sozial und politisch motivierte Migration mit echten Flüchtlingen auf die Bühne und ließ das, in der Oper aus privaten Machtkämpfen verübte, Attentat auf Titus Vespasianus gipfeln in einer Rebellion der Flüchtlinge und Ermordung des Imperators.

Figur Nr. 2: Wolfgang Amadeus Mozart: *La clemenza di Tito*, Inszenierung Milo Rau, Grand Théâtre de Genève, 2021  
Im Flüchtlingslager kniet Sextus (Anna Gorjatschowa) vor dem erstochenen Titus (Bernard Richter)



Foto: © Carole Parodi / Grand Théâtre de Genève

Da der Schluss der Oper aber einen lebenden Titus erfordert, ließ Rau den Erstochenen von einer, bei den Flüchtlingen weilenden Voodoo-Priesterin wieder beleben. Neben politischem Assoziationsmaterial auf Leinwänden wertete er auch die Identität der Bühnenakteure auf durch Live-Kamera-Videos und Projektionen ihrer Lebensläufe.

Aktualisierungen codieren die historische Verortung der Handlung um und transportieren neue politische Botschaften. Frank Castorf ließ in seinen Inszenierungen 2016 in Stuttgart und 2021 in Wien Charles Gounods *Faust* in Paris während des Algerienkriegs spielen. Valentin zieht folglich als Soldat in diesen Krieg. Seine Schwester Marguerite ist hier eine Prostituierte. Mephisto betreibt einen Voodoo-Laden. Die Collage der visuellen Referenzen enthält auch eine U-Bahnstation „Stalingrad“.

Gegen die Asylantenabschiebungen kreierte Christoph Schlingensiefel 2000 die neben der Wiener Staatsoper platzierte Skandalperformance *Ausländer raus! – Bitte liebt Österreich*.

Die Oper öffnete er als hypermediales Ereignis für seine interkulturellen Visionen: Seine Inszenierung von Richard Wagners *Parsifal* als multikulturelle Installation stand 2004 bis 2007 bei den Bayreuther Festspielen auf dem Spielplan.

Figur Nr. 3: Richard Wagner: *Parsifal*, Inszenierung: Christoph Schlingensiefel, Bayreuther Festspiele, 2006

„Nur eine Waffe taugt“ (Parsifal: Alfons Eberz, Ensemble)



Foto: Jörg Schulze © Bayreuther Festspiele

In Manaus verband er die weltweit verbreitete Sage vom untoten Seefahrer in Wagners *Der fliegende Holländer* mit Elementen der brasilianischen Kultur, dem Día de los Muertos der Santeria-Religion und der Salsa im Karneval von Rio. Die Aufführung von Wagners *Holländer* im Opernhaus war flankiert von Musik- und Filmaufnahmen im Urwald und einem massenhaften Volksfest der Indigenen.

### **Fremde Kulturen in Musicals**

Musicals zielen mit ihrem politischen Engagement häufig auf neuralgische Themen der Interkulturalität. 1927 haben Jerome Kern und Oscar Hammerstein in *Show Boat* erstmals African Americans auf die Bühne gebracht. Das Mississippi Show Boat *Cotton Blossom* bot den Rahmen, die Rassentrennung sowie die Diskriminierung von Mischehen und Mulatten zu thematisieren. Nach der „Eintropfenregel“ galt jede Person mit einem schwarzen Vorfahren als Schwarze/r. Die Starsängerin der Show wird entlassen, weil ein Elternteil Schwarz war, sie aber einen Weißen geheiratet hat, und sie endet als verzweifelte Alkoholikerin. Auf dem Show Boat verrichten African Americans die Schwerarbeit, Joe besingt sein elendes Leben in „Ol’ man river“.

Alain Boublil und Claude-Michel Schönberg verlegten Giacomo Puccinis *Madama Butterfly* (1904) für ihr Musical *Miss Saigon* (1989) in den Vietnamkrieg, der alle Beteiligten traumatisierte: Chris vom Töten, Kim vom Napalmtod ihrer Eltern, der Zuhälter vom Verlust seiner Existenz, Kims Verlobter, der Vietcong-Offizier Thuy durch ihre Zurückweisung, Chris’ Ehefrau durch die Liebe ihres Mannes zu Kim und Kims Sohn Tam durch den Selbstmord seiner Mutter.



Kim kam als neue Prostituierte ins Bordell *Dreamland*, wo ihre Kolleginnen alle hoffen, mit den amerikanischen GIs in die USA zu kommen. Der GI Chris verliebt sich in die Kriegswaise Kim, muss Saigon aber beim Einmarsch des Vietcong ohne sie verlassen. Kims Zuhälter will Chris' Sohn als Eintrittskarte in die USA benutzen, doch die „Boat People“ kommen nur bis Bangkok. Kinder von Amerikanern und Vietnamesinnen werden als „Bui Doi“/„Staub der Erde“ verachtet. Als Chris seinen Sohn zu sich nehmen will, erschießt Kim sich, um ihrem Kind eine bessere Zukunft zu ermöglichen.

Den Hochmut westlicher Missionare gegenüber Indigenen der dritten Welt prangern Trey Parker, Robert Lopez und Matt Stone in *The Book of Mormon* (2011) an. Der Missions-Trainingscenter in Utah schickt seine Absolventen in die Welt hinaus. Price und Cunningham kommen nach Uganda, werden ausgeraubt, mit Warlords, Armut, AIDS und Genitalverstümmelung von Frauen konfrontiert. Am Gegensatz ihrer Mission zur Lebensrealität der Dorfbewohner scheitert Price beim Versuch, den General Butt Fucking Naked zu bekehren. Cunningham kontaminiert die Geschichte vom „American Moses“ mit Science Fiction, gewinnt Zustimmung und die Zuneigung der AIDS-kranken Tochter des Ortsvorstehers. Als der Missionspräsident den Erfolg der Missionare in Uganda zu feiern kommt, führen die Dorfbewohner ein Schauspiel über ihr Verständnis von Cunninghams Lehre auf. Entsetzt entlässt der Missionspräsident die Missionare. Das Musical verspottet missionarische Weltverbesserungsaktionen und stellt interkulturelles Verstehen dar als möglich über Missverständnisse und Aneignungen.

### **Fremdkulturelles in Film und Fernsehen**

Aktuelle Inklusionseuphorie ironisiert die Culture Clash Satire. Philippe de Chauveron stellte in den Filmen *Monsieur Claude und seine Töchter* (*Qu'est-ce qu'on a fait au Bon Dieu?*, 2014) und *Monsieur Claude 2* (2019) eine französische Familie vor, deren vier Töchter vier Männer aus verschiedenen Kulturen heiraten: einen Juden, einen Algerier, einen Chinesen und einen Afrikaner. In *Hereinspaziert!* (*À bras ouverts*, 2017) propagiert ein akademischer Starautor in seinem Buch *Hereinspaziert!* die Aufnahme von obdachlosen Ausländern. Live im Fernsehen ließ er sich zur Zusage hinreißen, hilfsbedürftige Roma in seiner Villa aufzunehmen. Da erscheint eine neunköpfige Roma-Familie vor seiner Tür. Er lässt sie den Wohnwagen in seinen Garten stellen. Um sie für seine Werbung auszuschlachten, erträgt seine Familie die Übergriffe der Roma. Der Sohn des Autors verliebt sich in die Roma-Tochter, und das Happy End löst die Spannung des anfänglichen Entsetzens. Humor und Satire als Brücken zum Fremden?

Filme und Fernsehserien bringen Geschichten vom Kulturtransfer, von kosmopolitischen Städten und hybriden Identitäten ihrer Bewohner in die Wohnzimmer. Die Comedy-Serie *Türkisch für Anfänger* (ARD 2006-2008, 52 Episoden) wurde von rund 70 Ländern übernommen und teilweise im Sprachunterricht eingesetzt (FILMSTARTS, 2009; TYSKA Arbetsblad 2007/08, 2007).

*Alex Haley* hielt mit der TV-Serie *Roots* (Marquies & Wolper, 1977) der US-amerikanischen Gesellschaft einen Spiegel ihrer brutalen Sklavenhaltervergangenheit vor. Zwölf Jahre erforschte Haley die Geschichte seiner Familie und fand seine Wurzeln bei Kunta Kinte, der im 18. Jahrhundert aus Afrika verschleppt und als „Negersklave“ verkauft wurde.

Figur Nr. 4: LeVar Burton in *Roots: The Complete Miniseries* (1977)



Foto: © American Broadcasting Companies, Inc. All Rights Reserved

Das Filmepos erzählt von sieben Generationen der afroamerikanischen Familie in drastischen Szenen von Gefangennahme, Transport auf dem überfüllten Sklavenschiff, Verkauf, Zwangsarbeit und Auspeitschungen.

Der Erfolg des Romans und der Serien lässt vermuten, dass sie die Bewusstseinsbildung der US-Amerikaner und anderer Sklavenhalterationen beeinflussen konnten. Die *Washington Post* schrieb 1977: „After *Roots*, TV will never be the same“ (Vanocur, n.d.).

Die kanadische National Broadcasting Company CTV hat mit *Transplant*<sup>3</sup> erstmals in Nordamerika einen aus Syrien geflüchteten Moslem zur zentralen Figur einer Serie gemacht, um zur Humanisierung von Migranten beizutragen und die Einwanderungsgesetze und Vorurteile der Bevölkerung zu kritisieren (Elghawaby, 2020). Den Protagonisten Bashir Hamid spielt Hamza Haq, in Saudi Arabien geborener Sohn pakistanischer Eltern, der mit 9 Jahren nach Kanada kam. Er spielt einen Unfallchirurgen, der nach der Zerstörung des Krankenhauses seiner Eltern in Syrien, nach Inhaftierung und Folter, nach Toronto floh. Bei einer Explosion rettete er einem Verletzten das Leben, indem er mit einem Schlagbohrer dessen Schädel aufbohrte, um den erhöhten Hirndruck zu lösen. Gerechtet wurde so der Chefarzt einer Klinik, der Hamid trotz fehlender Originalzeugnisse als Assistenzarzt einstellte. Der geniale Diagnostiker beweist seine Qualifikation, obwohl ihn

<sup>3</sup> Joseph Kay, Jocelyn Deschênes, Bruno Dube, Randy Lennox, Virginia Rankin, Jeremy Spry, Tara Woodbury (Produzenten) *Transplant* [TV-Serie]. 2020-heute, 4 Staffeln mit 40 Episoden. Sphère Media Plus, Bell Media, NBC Universal International Studios. CTV (Canada), NBC (USA).

seine Traumatisierungen und die Unsicherheit seines Aufenthalts schwer belasten. Der syrische Migrant ist als Sympathieträger inszeniert, allerdings ohne Betonung seiner islamischen Religion. Er erweckt Mitleid, Hilfsbereitschaft, Bewunderung und stellt eine für die Mitbürger wertvolle Kompetenz von Migranten aus.

Die Fantasy und Science Fiction spielen mit erfundenen fremden Welten und ihren Bewohnern, so etwa die von Gene Roddenberry kreierte Serie *Star Trek*.<sup>4</sup> Darin erheben Fantasiegestalten aus fiktionalen fremden Galaxien den Anspruch, in der „intergalaktischen Konföderation“ als gleichwertige Partner zu gelten. Ihr Aussehen weckt Abneigung gegen das Nicht-Menschliche und Faszination für das vielleicht Mögliche – wird hier eine Emanzipation von nicht humanen Entitäten suggeriert wie im Umgang mit Robotern eine Gewöhnung an humanoide Helfer?

Interkulturelle Szenarien zeigen Aspekte der multikulturellen Gesellschaft, Entdeckungen, Visionen und Fantasien, die zum Verständnis des Fremdkulturellen und seiner sozialen Integration beitragen können. Das Fremde wird als beängstigend aber auch mit Faszination für andersartige Schönheit wahrgenommen in seiner Vielfalt und mit Spuren seiner Hybridität. Durch Imitation, Aneignung, Vermischung, aktive und passive Anpassung wird der Umgang mit dem Fremden geübt. Wechselseitiger Kulturtransfers kann zu kosmopolitischen Kulturen führen, mit Ablehnung die Globalisierung unterminieren oder sie durch Zustimmung fördern. Die kreativen Gestaltungen der performativen Medien kommentieren die Wandlungen der Kulturen und unterstützen eine interkulturelle Resilienz.

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<sup>4</sup> *Star Trek*, Die originale Serie: *The Motion Picture* (1979) – II: *The Wrath of Khan* (1982) – III: *The Search for Spock* (1984) – IV: *The Voyage Home* (1986) – V: *The Final Frontier* (1989) – VI: *The Undiscovered Country* (1991). The Next Generation: *Generations* (1994) – *First Contact* (1996) – *Insurrection* (1998) – *Nemesis* (2002). Reboot (Kelvin Timeline): *Star Trek* (2009) – *Into Darkness* (2013) – *Beyond* (2016). TV-Serien: Broadcast Television: *The Original Series* (1966-1969) – *The Next Generation* (1987-1994) – *Deep Space Nine* (1993-1999) – *Voyager* (1995-2001) – *Enterprise* (2001-2005), Streaming: *Discovery* (2017-heute) – *Picard* (2020-2023) – *Strange New Worlds* (2022-heute).

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*Renáta Anna Dezső*

*FROM COCOONS TO BUTTERFLIES: CROSS-CULTURAL RESILIENCE  
OF THE FIRST GRADUATES OF AN INTERNATIONAL  
UNDERGRADUATE PEDAGOGY PROGRAM AT THE UNIVERSITY OF  
PÉCS*

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Abstract

The University of Pécs, UP has a long tradition of training international students, and educational sciences related programs have a crucial role within this repertoire. Amongst these programs an undergraduate one, i.e. Pedagogy BA – Intercultural Educational Assistant Specialization was developed, authorized and issued in the middle of the Covid 2019 Pandemic.

Due to the international nature of the program both its content and command must meet criteria of current standards, therefore it aims at fulfilling the ethos of the 2030 OECD Learning Compass. The first graduates received their degrees in July 2023, and are heading towards their future careers as educators – but are they armed with competences suggested by the OECD 2030 Learning Compass?

Besides outlining the peculiarities of the program, and the ways its designers coped with the struggles of the circumstances of the pandemic years via the author's (i.e. program manager's) participative-observational narrative description, a brief interpretation of students' cross cultural resilience is being introduced based on a survey carried out amongst the first graduates. Their feedback is overall positive regarding the development of their own self-perceived cross cultural resilience. Also, it may be concluded that the newly introduced major could cope with the challenges that occurred during the years of the Pandemic.

The practical significance of this report is obvious, as it reflects on relevant lessons that may be learnt by the management of the program and initiators of future programs alike. It also calls attention to the significance of the learner's role shift that may be attached to the OECD 2030 Learning Compass framework.

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*Keywords: knowledge transfer; university students; strategy*

**Agency within the Internationalization competition of the academic arena**

One of the most significant and progressive features of tertiary education in the twenty-first century is international student mobility, including the notion of founding and maintaining international study programs. As well as numerous different non-Anglo-phone countries, the University of Pécs (UP) has entered the internationalization competition decades ago – in other words it has been fulfilling an agency role of this respect for years, using English as a Medium of Instruction, EMI (Dearden, 2016, 2018; Macaro et al, 2017; Galloway et al, 2018; Galloway & Rose, 2021).

Although EMI serves as lingua franca within the international academic arena, the way we learn in the 21st century worldwide still remains very diverse from several perspectives. In order to unite basic ideas concerning the essence and the virtues of education globally the OECD has been making efforts for decades to make educators speak a common professional language, defining and selecting values, attitudes, knowledge and skills for a livable future (Rychen & Salganik, 2003). Concerning such a general goal set for our decade, OECD gathered educational professionals from a wide disciplinary pool who expressed and shared their related experience and beliefs regarding the components of the true and necessary ethos(es) of learning for our common future. The OECD Future of Education and Skills 2030 project implies a framework for learners and educators defined as the OECD 2030 Learning Compass (Compass hereafter) for societal well-being of individuals (citizens) in today's and tomorrow's societies (OECD, n.d.-b).

The main goal of the Compass is to suggest a framework which enables the individual to become their own agent and also a co-agent of peers, and communities (OECD, n.d.-b). Along the previously defined values, attitudes, knowledge and skills (Rychen & Salganik, 2003) the learner may act for the sake of well-being both on individual and community levels. It suggests a fundamental interpretational shift of learners: instead of – or at least besides – passively receiving instructions and following orders, they need to navigate within and towards unknown and uncertain circumstances.

The symbol of a compass evokes the notion of great explorers, who were armed with the most prevailing competences of their ages and served as conscious and autonomous agents of themselves as well as their that time and future communities. Similarly, international students are by all means explorers of cultures that are foreign to them, and in this way we may predict that the degree of their resilience is generally above of those of their peers who remain within their own cultural and societal settings.

On one hand, as the Compass was developed in 2019, its notoriety may be narrower than it deserves due to the priority of issues focused as consequences of the Covid19 Pandemic. On the other hand, it was the Pandemic itself that set an unknown and uncertain world globally for each of us as agents, including the world of academia and tertiary education.

### **A novel program on the UP internationalization horizon**

By today (2023) UP advertises Post-graduate Specialist Trainings (non-degree programs) (4) as well as various programs from Bachelor (43) to Master (47) or One-tier Master (4) degrees, from Preparatory (2) to Doctoral (14) levels. The numbers in brackets indicate the numbers of accredited and advertised programs that may be found online at the Study in Pécs, Hungary! website (University of Pécs, n.d.). Note, that not each of these programs are necessarily active, however, according to the relevant study.eu 2023 data, 23% of UP students are international ones (Study.eu, n.d.).

Education sciences related programs have a crucial role within this repertoire: a doctoral school, teacher programs on eight different fields, master (graduate)-, and bachelor (undergraduate) courses such as adult education or a pre-school teaching program is offered. Amongst these programs our undergraduate one, i. e. Pedagogy BA – Intercultural

Educational Assistant Specialization is the freshest issued major. For admission to this BA degree program a complex foreign intermediate language certificate, level B2 on CEFR 2020 scales (Council of Europe, 2020) or an advanced level GCSE language exam or certificate is needed.

During the 2019 spring semester, the academic staff of the Institute of Educational Sciences (IES) at the Faculty of Humanities and Social Sciences (FHSS) at the University of Pécs (UP) developed a new international bachelor program – the author, being the program manager –, that had existed before exclusively in Hungarian. The license of the Pedagogy BA program with Intercultural Educational Assistant Specialization was issued in the summer of 2019 (OH, 2019), so spring 2020 was the head start for admission interviews. Out of 12 accepted applicants 11 students from China, Mongolia, Vietnam, Turkey, Slovakia, and the Netherlands started their studies in September 2020 followed by others in September 2021, September 2022, and September 2023 from further countries, such as Qatar, Laos, Mauritius, Colombia, Costa Rica, Russia, and Kosovo (Bergan & Restoueix, 2009). At the end of the 2022/2023 Academic year 10 students graduated from the program, and at the beginning of September 2023 8 first graders, 8 second graders and 5 third graders were studying for their bachelor degree in Pedagogy.

Concerning the international and practice-based nature of this educational innovation several challenges had to be answered within the first three years of the program, overcoming the limitations caused by the Covid19 Pandemic. In the following descriptive study, we aim at summarizing the scope of the major, the lessons of the challenges learnt during the lock-down period, and introduce ways of solutions implied mostly adapting online forms of education.

The level of our program on educational degree is 6 on the ISCED 2011 scale (UNESCO-UIS, 2012), and the qualification stated in the certificate we offer according to the OH 2019 decision is BA in Pedagogy (the English equivalent of qualification: Philologist in Pedagogy) – the area of study field according to the standardized classification system for qualifications (UNESCO-UIS, 2014) in training areas, ISCED-F 2013, is 142/0111. As for field classification this training belongs to humanities, the duration of training is 6 semesters. Students need to obtain 180 credits with practical orientation.

We aim at training educational professionals who are familiar with the world of society, culture, learning and teaching, and are able to contribute to the processes of learning as well as to the development of individuals and groups in educational institutions, professional, governmental, and non-governmental organizations. Our graduates may become professionals suitable for providing educational tasks both inside and outside the school system, work in organizations dealing with educational issues, and within institutions performing tasks which require the basic pedagogical skills. They are committed to lifelong learning and can fulfil the requirements with sufficient autonomy. Armed with a sufficient quality of relevant academic knowledge, our graduates are ready to continue their studies in master studies.

Concerning professional characteristics and the structure of the 180-credit worth program the following disciplines and special fields leading to qualification are involved:

- social scientific knowledge contributing to general competences: history of philosophy, social sciences, pedagogy, psychology, the world of arts and sciences (10-12 credit points),
- theoretical principles of teaching and education: socialization, the fundamentals of teaching and education and its social dimensions, major pedagogical and psychological theories (15-25 credit points),
- institutional frames of pedagogical activities, their main areas and the pedagogical aspects of their operation: educational and teaching systems, networks, institutions, and the pedagogical activities connecting to their operation, development, and innovation. Social, cultural, and historical context, individual professional knowledge, competence contents (30-45 credit points),
- methods, forms and tools of practicing and supporting praxis in pedagogy: reflective practice, the world of work and learning, study groups; the aim, frames and process of systems, organizations, and individual support; projects and competitions; empirical and theoretical research methodology (50 credit points),
- electives, that contain profession-specific knowledge (maximum 50 credit points).

We had carefully selected our training institutions so that they would be appropriate for carrying out special fieldwork, suitable to develop personal abilities and give theoretical and practical knowledge that enhance special competences thus enriching individual interests. These internships include professional practicals carried out in educating and teaching institutions of the Hungarian public education system, and also venues in public educational institutions that provide special educational services. Professional practical rotation is also concerned to take place in pedagogical services related institutions, and international organizations, such as the American Corner, or the Confucius Institute. During professional practicals our candidates are expected to use their obtained knowledge in real-life situations and develop their own experiences with problem-shooting approaches. There are shorter and longer practical-related courses within the program from the second semester to the sixth one. Concerning the main internships, their total duration is two times 12 weeks, i. e. 240 hours during the fourth and fifth semesters of the program – which is a rather special characteristics of such a major. We may even state that this is the phenomenon that makes our program attractive for international applicants.

### **Clouds of the Covid-19 pandemic on a pale blue sky of a new beginning**

After the license we received during the summer of 2019 enabling us to advertise the newly developed program for the first time whilst the fall 2019, we made it available at the international portal of UP via the Dream Apply platform and also through the central Hungarian nationwide admission portal, Felvi.hu. We had the idea in mind that the more heterogeneous our groups of students themselves would be the more we set a basement for intercultural interaction (Nieto, 2017) – a leading peculiarity of the program. When the first international news regarding a challenging epidemic caused by a new virus



started to infiltrate our everyday realities between December 2019 and March 2020, there we were full of perplexity regarding the future of a notion that has not even begun.

Not little were we conscious or sober minded in spring 2020 that a program to be started during the fall of the same year, being international in nature and unique regarding its practical orientation would raise scepticism amongst those who were questioning the possible reasons for existence of an innovation already. Applicants started to occur, and we began to carry out admission interviews on Skype. As previously we had made the program available for Stipendium Hungaricum grantees, we gained inquiries from Asian countries, such as Mongolia and Vietnam. Concerning the Chinese contingent of candidates most of our that-time-would-be students had already been staying in Hungary at the time of their interviews, either studying in preparatory language courses or being involved in majors they were not satisfied with or succeeded in. These characteristics were owned by our Turkish applicant as well. Interestingly, two of our accepted applicants were ethnic Hungarians – one of them a Slovakian citizen, and another one born in Hungary but raised in the Netherlands. Their presence in the program later on proved to add a bridging value during the upcoming three years of studies.

Once we became conscious of the challenges due to the natures of the program, we had ahead of us, we could group those into two basic categories. The first group of challenges occurred because of the international nature of the program. Although we had experience with international mobility students, and with full time students from programs of units other than our own ones of UP (such as Trainer BSc, Recreation MSc etc.), we foresaw possible problems of arrival and safe stay of the accepted students, concerning the timing of the forthcoming semester(s), channels of professional communication, and probably modified expectations of both students and colleagues – due to the changes of general circumstances. The other group of challenges we had been aware of originated from the seminar focused and practical based natures of the major.

### **Overcoming challenges**

By September 2020 we had twelve accepted students in the program, and with the exception of one Egyptian student, ten brave ladies and a male counterpart arrived at Campus. It was a rather positive but surprising ratio, as relevant legal regulations at the time were quite uncertain and we had still accepted most of the enrolled students not being willing to risk a determining journey (or prolonged stay) to Europe. Similarly to international legislation, UP regulations being rather uncertain at the time we started our classes live. Nonetheless from as early as the second occasion of courses – international students start their fall semester one week behind their national counterparts due to their annual orientation week – we had to modify this mood.

As Microsoft 365 has been used as the official digital service framework of our university, its Teams application turned out to be the platform for learning and teaching in the coming semesters. Due to previous tertiary education related experience peculiarities of our students we did not need to handle startled, fearsome acts of foreign teenagers but we had a mostly mature audience who could easily adopt to digital ways of learning in a short time.

Accommodating to online learning may have not proved to be as big of a challenge as getting used to teaching online. Due to the small size of our study group (note, that for two semesters we only had one grade on the program) we did not face issues of getting loss of connection. Students' and our own cameras were on most of the time maskless, so we could even better personalize this way than live of those times (wearing masks, see below).

Lecturing was never an option throughout the design of the program, so group work and discussion-based activities made us explore MS Teams tools in a relatively short time. By the end of the first semester most of us became convenient with skipping in and out of chat rooms, making shared class notes, downloading, and uploading required documents, sharing screens and sounds, and sending individualized versus group messages. The digital nature of the platform eased to prove the origin and formation data of requirements as it helped transparency to a great extent. On the other hand, we struggled with requests concerning recordability. Most of my colleagues found recording counterproductive as it effected against intimacy – a media necessary for sharing experience and opinion of focused topics.

The 2021 spring semester was the most challenging of all terms within the Covid19 era. Students and their professor could not meet personally for a single moment as overall online education expectation was announced worldwide. It was not exclusively implied in tertiary education but in each venue of the public education system – making practical visits impossible to carry out for freshmen. This way the essence of the program could have been ignored. Fortunately, everyone understood that lessons we were learning were great examples of adaptation and flexibility, skills that are indeed needed for future professionals (see competencies gained below).

Previously recorded classroom activities of the UP-partner schools and based-on-a-true-story type of movies and their related literature (Clark, 2003; Gruwell, 2007; Dalton & Linder, 2017) served as artificial venues of practicals, because we found ourselves in need for valid, not artificial examples. Along pre-watch, watch-along and follow-up discussion activities students learnt to analyze educational scenarios, conflicts, characters. Needs of learner differentiation occurred as well as social inequity issues mirroring not only challenges of those represented but of those analyzing these cases. UNESCO documentaries reflecting on journeys to schools called attention on basic economic differences, and shaded Anglo-Saxon pictures driven ethos of schooling – even better than plant originally, focusing on rural Hungarian examples.

Withdrawal of partner schools did not last just one semester. General xenophobia, especially against Asians having been seen as scapegoats of the Pandemic did not avoid these educational arenas, our long time - partners, either. Short visits were first allowed during the 2022 spring semester, whereas 120 hours long internships needed to be postponed – they could only start in the 2022 fall semester.

As time passed by, we had more and more students to be served in a continuously changing learning-teaching university-, and educational practical based environment. During the fall 2021 we were happy to start with new freshmen live – but we needed to

wear masks in classrooms and common activities had to be avoided due to local regulations. Although we aimed at encouraging students' class presentations and the focused usage of online sources (such as TedTalk presentations) as substituting approaches, satisfaction of both colleagues and students was least detectable, according to relevant oral feedback.

After a short shocking series of live conference cancelling, international online conferences occurred in the field of educational sciences as well. Whenever colleagues had the possibility to contribute to such events, an occasion opened for student in observing roles at these scenarios. This feature definitely turned out to be a positive result of the lockdown area, as previously students on bachelor majors did not typically attend academic events of their fields alike.

Meeting colleagues from the international academic arena did not stop at venues of conferences. These occasions also reinforced and encouraged gratis online guest teaching staff lecturing – due to temporarily restricted accessibility of such mobility programs.

### **Resilient agents armed with competences**

Despite of the challenges due to consequences of the Pandemic in tertiary education, both global (OECD, n.d.-a) and profession-related competences could have been acquired during the program. These competencies also reflect on the framework of the Compass – as in times of challenges, we are forced to be more initiative, creative, innovative, in a shorter period, as usual. Resiliency and agency both may be traced via the following competence components, as well as the shift in the learners' role.

Undoubtedly equipped with concentrated digital competence components in general, besides the added digital nature of these times, value-based attitudes lead to gaining knowledge components that could have been practiced autonomously with responsibility resulting educationalists' skills and abilities. Completed professional practicals and thesis work of the first cocoons of the major suggest the results detailed below.

By their final semester students have proclaimed that they accept the correlation between theory and practice of educational sciences, and their co-disciplines. They have proved that they are open to the changing world of pedagogy proceeding hand in hand with social alterations and accept aspects of inclusion and adaptability. Following international trends in educational sciences and self-reflective development became their daily routine. Standing for the importance of cooperation and the common weal is as much as their approach by now as continuous re-evaluation of their own attitudes towards social and cultural differences; especially characterized by sensitivity to the situation of minority groups: they embrace equity and perform tasks with respect to children's and human rights. They are interested in various research, development and innovative findings, new trends, methods, and tools. Accepting that making mistakes can be a steppingstone of learning and development is also an achievement of theirs, as they stand for the necessity of lifelong learning and the sharing of knowledge.

During those past three years our students have gained a basic knowledge of pedagogy and an understanding of how psychology can be applied in education and interpersonal

relationships: they have become familiar with fundamental facts of personality development, the psychology of learning as well as social psychology. Our intercultural educational assistant graduates have also acquainted with the basic concepts of sociology and anthropology and gained a thorough understanding of the relationship of contemporary societies, culture and their institutions, the role of diversity and versatility. They got to know the major international tendencies of teaching, educational development, and innovations: the strategies and methods of learning, as well as the various procedures of supporting learning, teaching, and educational processes in the case of learners of different age groups and diverse cultural backgrounds. Their professional experiences armed them with knowledge of specific features of heterogeneity in various study groups and they became aware of methods for planning and implementing different teaching and educational processes and the supporting projects and research as well.

All in all, they became able to recognize problems of pedagogical or psychological nature, encountered in relation with education, teaching, research, development, or professional cooperation. They know how to collect and follow information in their field and choose according to relevant viewpoints, using the specific terminology and basic principles of educational sciences in both written and oral ways. Argumentation within specific settings and understanding the relevancy of other contributors has been a must for their thesis writing, too. Even observing them getting ready for their final exam one could see that they cooperated, constituted, and communicated, evaluated their own and their peers' work and activities that had been carried out – so they possessed well-developed reflectivity. During their practicals they contributed to public educational institutions' legal operation and have taken active part in achieving their goals, by carrying out effective acts in administering, planning, and organizing pedagogical assisting tasks and projects.

Their autonomy and responsibility could have been traced along the activities mentioned above. By the final semester of their studies these deeds were carried out with responsible consideration of the participants' interest and aims involved. Individual work under the guidance of a professional leader, teacher, with the commitment of reporting about performed activities occurred in each of their cases, especially whilst helping minors – as in these cases liability is restricted and helping support is needed. Effective usage of time and energy were also markers of our first graduates' autonomous and responsible decision making, based on the realistic understanding of their own competences.

### **Personal testimonies on cross-cultural resilience**

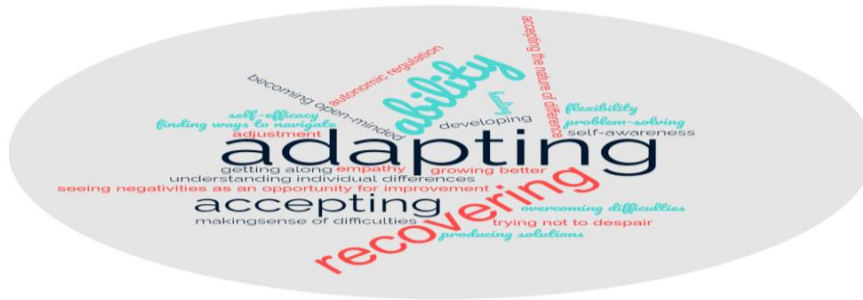
Besides the above detailed experience of the author's (i.e. program manager's) participative-observational narrative description, we investigated students' cross cultural resilience (CCR) via a survey (see Appendix 1) carried out amongst the first graduates. Each graduating student (N=10) filled in the questionnaire during April 2023 anonymously, although the sample having been known for the researcher made it possible to identify the answers to students. Although the respondents had been aware of this peculiarity of the survey, they contributed along the ethos of the sharing is caring principal. Their answers were analyzed, data transformed into insights, i. e. word clouds.

The replies reinforced information on the nationalities and gender of the participants, and clarified their exact age in general (i.e. 25 years) – supporting the view, that they are older than their Hungarian counterparts (a similar program is available in Hungarian for non-international full time students with different specializations at the same unit of UP). Also reinforcing information could have been gained concerning students' pre-program and during the program intercultural experience out of Campus and Hungary.

As for such previous experience three students claimed no relevant involvement, and one referred to such involvement within her home environment for a short period of time. Four student recalled peer-cultural memories, two of them within Europe and another two within Asia. An additional two students had non-peer cultural experiences prior to the program. During the program two students could afford several journeys, another two home visits, and an additional two persons had profession related longer summer programs outside Hungary. One of the students could once travel to a neighboring country for a short period of time and three of them stayed within our country for the entire length of the six semesters. These background markers show that although our first graduates had already been agents of change in a cross-cultural sense, their decision making regarding aiming at accommodating to a new, intercultural setting was a huge step towards this kind of resilience. Concerning the data showing that not too many of them had plenty of possibilities to gain cross-cultural experience outside the program during their stay in Hungary due to the program, we may pre-proclaim, that our further findings regarding CCR correlate with the nature of the major they were part of between the semesters of fall 2020 and of spring 2023. However concerning nationalities, in two cases the nuclear families of the students themselves have a cross-cultural nature, and in these situations this circumstance has to be considered as well as a possible correlation factor of students' CCR.

As for self-defined CCR eight out of ten students proclaimed themselves having this capability, one stated a definite denial, and another person claimed herself being "half-half" (8.5/10). The key features mentioned as components of self-defined CCR may be traced investigating Figure 1. This word cloud summarizes the most widely used morphemes, where verbs such as 'adapt', 'recover', and 'accept' and the noun 'ability' catch the eye.

Figure 1: Key features of self-defined cross-cultural resilience according to students, 2023 (N=10)



Source: own source

Even if not every single student claimed to have CCR on a personal level, every one of them declared it being important in their own lives as it may be captured by looking at the word cloud of Figure 2. ‘Getting out of one’s comfort zone’ and ‘bridging’ are the reasons behind.

Figure 2: Self-declared significance of cross-cultural resilience, 2023 (N=10)



Source: own source

Figure 3: Program contribution to cross-cultural resilience, 2023 (N=10)



Source: own source

It is rather notable, that the fourth word cloud (Figure 4) shows the least variety of answers, which limited ratio of feedback may be due to relevant overall satisfaction. However, a clear request of avoiding forcing CCR may be traced, possibly due to continuous teachers’ requests towards interpreting this (or similar) notion(s) – as a declared peculiarity of the program, i.e. being intercultural.

Figure 4: Program proposals of students regarding cross-cultural resilience, 2023 (N=10)



Source: own source

An additional lesson that may be learnt from Figure 4 data is the demand for out of campus activities. Although this need may be due to the Covid19 period students have been through for the first half of their studies, it also supports the agency idea of the Compass and the internalized need for real life challenges, which is a shifting phenomenon within the changing roles of universities (Németh, 2022).

### Lessons learnt – Years ahead

Both teachers and students travelled a long journey together in the past four-five years in the Pedagogy BA program. Students' journeys started with their admission interviews during spring 2020, at the beginning of the first Covid19 lockdowns, whereas course designers' (including the author of this publication) ones a year before. Both our first graduates and our program – including our further students – have years for continuous professional development ahead. After their graduation in June 2023, according to their own written reports our first cocoons turned into butterflies. Their fortunes represent the original expectations of the program designers and justify the reason for existence of this major. Some graduates continue their studies on master level in the fields of human relations, adult education, psychology, educational psychology, or special education – either staying at UP or elsewhere in Europe as well as outside Europe. Some of our first graduates started work either in their home countries or elsewhere – and some are still concerning possibilities.

The experiences of the first three years of the program reflect on its success once its markers may be summarized as follows: 1. Despite of the Covid19 Pandemic ten out of eleven students graduated within the proper timeframe of the major for the first time in the history of the program introduction. 2. The gained outcome training competences of our students go hand in hand with those set by the OECD Learning Compass 2030 framework goals. 3. Qualified as intercultural educational assistants, according to our survey results, our graduates have gained cross-cultural resilience – a basic skill of individual and social well-being. 4. Students have not reported on having been self-perceived as subordinated or excluded opposed to those of their peers who internationalize in Anglophone

environments (for the results of other researches related to the phenomenon, see e.g. Hayes, 2019).

On further grades we have less students. A year ahead we accept half as many graduations as in 2023, whereas in the forthcoming years the accepted student attendance number is in between the two. Our plans regarding enabling (Scrivener, 1994) students rather than teach for the sake of repetition proved to become a demand from the students' perspectives, too. And this demand needs to be respected and be taken seriously, in order to avoid counter-productive program outcome results even though the scope of the traditional repetition echos meaningful slogans, such as the significance of resilience in an educator's life. Hopefully, we learn their message: not to force, but enable our students to become and remain resilient interculturally – as they may become our own colleagues someday.

### Acknowledgement

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Appreciating colleagues' work, who taught within the program between September 2020 and April 2023 is also a must – their contribution to the achievements of our first and the forthcoming graduates is undoubtable: Ferenc Arató, Ágnes Bálint, Zoltán Beck, Tibor Cserti Csapó, Erika Csovcsics, Dóra Fedeles-Czeferner, Bálint Fodor, László Kocsis, Éva Markó, Julianna Mrázik, Fanni Székely- Trendl, Zsófia Tószegi, Judit Tóth, Aranka Varga, Kitti Vitéz, Ildikó Zank.

Last, but not least I dedicate this publication to our first butterflies to remind them of their journey that have started in Covid cocoons, but has taken them towards becoming resilient agents, pedagogues, and intercultural educational assistants at UP, Hungary between September 2020 and June 2023: Siilen Bayaraa, Liwen Chen, Gizem Eroglu, Beatrix Farkas, Yi He, Saikhanjargal Lkhagvasuren, Minh Ngoc Nguyen, Fanni Sztahura, Ruixia Tang, JingDan Zhang.

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## Appendices

### Appendix 1: Cross Cultural Resilience Feedback - Pedagogy Ba Program Pécs Univ, Spring 2023

Source: own source

#### **Please note, that your feedback is anonymus and may be used for research and development**

Nationality (if multiple, pls detail):

Age:

Gender:

Previous experience (before current program) abroad and / or within settings of different in nature than your initial one(s):

Paralel experience (via current program) outside Hungary:

Your own understanding of resilience (you may make up your own definition or choose one from the already existing ones):

Do you consider yourself cross-culturally resilient? (pls indicate) YES / NO

If yes, in what ways?

If no, why?

Is cross-cultural resilience important in your life? (pls indicate) YES / NO

Why?

In what way has your program contributed to your cross-cultural resilience (if any)?

In what ways do you think your program should / could contribute to the cross-cultural resilience of its students?

*Diana Borisova*

*THE ROLE OF THE NETWORK FACTOR FOR IMMIGRANTS IN  
INTERCULTURAL RESILIENCE BUILDING ON THE EXAMPLE OF THE  
INTERCULTURAL CITIES PROGRAMME*

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**Abstract**

Migration is a process, which is associated with realizing cultural differences in understanding the self, relationships and the world and learning new ways of existence. Promoting multiple forms of the positive interaction creates a sense of belonging and cohesion for immigrants. In this context, "interaction" refers to the everyday processes or networking on the grounds of which migrants maintain contact with each other and with receiving societies. Therefore, a lot of cities realise policies and projects that ensure the application of equal rights for all, fight against discrimination and racism, and support constructive interaction between individuals and groups of different backgrounds, different cultures and different generations. The purpose of this research is to consider how one of these programs, namely the Intercultural Cities Programme, takes into account the network factor in its implementation and to prove how important this factor is for integrating immigrants into the host community. The hypothesis of this work is based on the idea that the using of the network factor develops intercultural resilience building. The primary method for this study is literature review. The examination of appropriate literature gives rigorous description of current situation with immigrants and cross-cultural resilience in general and within the framework of the Intercultural Cities project. Research results reflect the idea of integrating immigrants into communities with the help of network factor. The significance of this study is conditioned by providing learning cities with information about cross-cultural resilience building and making cities all over the world rethink their policies for using diversity as a stimulus to progress.

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*Keywords: intercultural; immigrants; network*

**Introduction**

Nowadays chains of occasions in the world gradually lead to high migration flows. People in new country easily incur multiple stresses that can affect their mental wellbeing, including the loss of cultural norms, religious customs, social support systems and adjustment to the new culture (Bhugra & Becker, 2005). According to it, immigrants are in search of interethnic contacts with natives of the host country. The process of establishing relationships between these groups of people is the direct responsibility of governments. Governments in cities throughout the world create platforms that are based on developing comprehensive intercultural strategies to manage diversity as an advantage for the whole society because intercultural interaction and inclusion also can bring advantages to the city development of economic, social and political ways. The Intercultural Cities Programme is a concept of the migration integration and positive diversity management,

which provides various tools to help authorities to implement the adjustment of communities from different backgrounds using policies that transform the urban environment in a way that it multiplies occasions for meetings, exchange and dialogue.

### **Problem statement**

Despite the fact that migration processes occur all over the world, the problem of prejudices still exist in different communities. This issue is a reason to create different programs that ensure the practice of equal rights for all, struggle against discrimination and actively promote constructive interaction between individuals and groups of different backgrounds, cultures and generations. The intercultural integration is a way to show that migration is able to contribute to the richness in diversity of cultures, ethnicities and races and to build intercultural resilience.

### **Aims and objectives**

1. Determine how people face the problem of intercultural resilience during the immigration.
2. Find out how the network factor appears during the process of the intercultural resilience building.
3. Know main components of the Intercultural Cities Programme.
4. Assess the importance of the network factor in the framework of Intercultural cities project.

### **Research questions**

The study seeks to provide answers to the following questions:

1. How can immigrants and intercultural resilience be connected?
2. What forms of the network factor appear during the process of the adjustment in a host country?
3. What does the Intercultural Cities Programme propose?
4. What spheres does the network factor influence in the Intercultural Cities Programme?

### **Interconnection between intercultural resilience and immigrants**

Migration process from some countries to others is a common phenomenon, which directly rises cultural and psychosocial issues as well as political and economic challenges. Social and culture areas concern basic markers for the adaption into the community: cultural habits, values, benefits, language and religion. Then, economic integration is connected with capitalist relationships: labour market, education and training, skills and qualifications that are important for the professional development in accordance with economic needs. Political integration is a sphere that shows how immigrants take part in public and political life of the hosting country: connections with local authorities, voting and participation in some organizations (Algan et al., 2012). The importance of cultural and social integration and adoption as basic one is not directly associated with economic

and political issues. However, these aspects both can influence the involvement of immigrants in ensuring economic welfare and active political life of the receiving country. Moreover, a mutual process touching all mentioned areas includes the strategy of the interaction of non-dominant groups with the dominant culture. This strategy requires immigrants to adopt the basic values of the larger society, while the host society has to be prepared to adapt national institutions to meet the needs of all groups that live in the plural society: no matter if they are long-term migrants (people, who stay in the host society at least a year) or short-term migrants (those persons, who move to the other country for a period of at least three months but less than twelve months) (Berry, 2011; UNECE, 2011).

There are four types of how immigrants interact with the culture of the hosting country:

1. Assimilation: a person has a weak relationship with the motherland but wants to develop stronger ties with the receiving country;
2. Separation: an immigrant continues to keep strong relationship with the homeland and avoids any contacts with the culture of the hosting country;
3. Integration: it is the situation when a person is actively engaged within both countries; therefore, he or she has a strong sense of identification to the original and the majority culture. The integration is possible when people, who are open and inclusive in its orientation towards cultural diversity, accept the right of all groups to live as culturally different people (Berry, 2011);
4. Marginalization: it means a weak link with both the majority and the original culture (Algan et al., 2012; Recupero et al., 2018).

However, in general, migration and process of the cultural integration cause the cultural bereavement (feeling of the loss personal ties and language, attitudes, values, social structures and support networks). Grieving for this loss can be considered as a healthy reaction and a natural result of migration (Bhugra & Becker, 2005). There are some psychosocial issues associated with immigrant's well-being during coping with the cultural bereavement. Firstly, immigrants tend to feel isolation because of the difficulty to create strong social ties in a new country. Secondly, homesickness is the most common problem among people, who leave their home countries. Stroebe et al. (2015) write that homesickness increases risks for psychological and physical health problems (for instance, anxiety and unhappiness) and lowered well-being. Hack-Polay (2012) conducted the research on homesickness among migrant workers and expatriates. During this research, Hack-Polay (2012) interviewed people from different backgrounds to describe what they feel during the migration process. The fear of the human beings in the new social context was paramount for a large majority of participants. This fear can come out in different situations: the fear of doing wrong things in the society, the fear for the safety factor, the fear of using familiar things in a new place (for example, bank services, public transport and even heating systems). The lack of language skills is an issue for a lot of immigrants because it impairs to large extent access to advice, information and guidance and social activities. There are four main paradigms to deal with these challenges: social paradigm, the educational paradigm, the personal paradigm and the medical paradigm.

Social paradigm is directly connected with the utilization of social networks. Hack-Polay's research (2012) proved that people find that contacts with different people, including locals and expatriates from own and other countries, are extremely productive in maintaining a certain psychological balance. The discovery of the community, the integration with it and contribution to it seem to be the most successful factors to cope with the disruption feeling because it is a vivid way to be up to date with all cultural trends in the hosting country.

Educational paradigm allows immigrants to provide an overview of the host country. For example, migrant workers consider cross-cultural management as a key aspect of this training. The pre-training benefits a lot in terms of language acquisition, cultural awareness and socialization.

Personal paradigm is a complex of personal willingness and self-directed cultural learning, when an immigrant constantly develops keen interest and desire to learn about cultures and practices in the host country. While using social paradigm an immigrant consciously or unconsciously, constructs a programme of learning that has a goal to decrease the effect of homesickness and isolation.

Medical paradigm means taking medicine, which are able to eliminate signals of body (for example, headache or tiredness), to get over negative inner feelings that accompany migration process. Although it can make a strong effect, it also shows significant drawbacks because it is not a practical way to adopt in a new place.

As it can be seen from the ideas of these paradigms, the cultural aspect is a central one. However, penetrating different cultures is not effortless, especially for people from those backgrounds that have a lot of cultural dissimilarities (Hack-Polay, 2012). This process is also hard because immigrants have to change or to adopt their already formed cultural identities into the new reality (Bhugra & Becker, 2005). Cultural identity is a mix of personality characteristics that are being formed in different social institutes and in different environments (for instance, family, work, leisure activities). The process of acculturation is inevitable during the cultural integration into the new society. It requires contacts between culturally distinguished groups of people and results in the assimilation of cultural values, customs, beliefs and language by a minority group within a majority community. Migrants, who experience the loss of their native culture, start feeling that the majority culture is less threatening and more inviting during the incorporation of its aspects. The interaction of the migrant's culture with the majority culture of the new homeland is a dynamic process "that can result in changes in the broader cultural group, enhancing the ability of people of the dominant culture to better appreciate and understand aspects of the immigrant's culture and recognize some of the needs of those who have migrated" (Bhugra & Becker, 2005, p. 22). Moreover, this process can be described as an intercultural dialogue based on the idea of interculturalism that became the new model in contrast to multiculturalism – "the label to describe the fact of pluralism or diversity in any given society, and a moral stance that cultural diversity is a desirable feature of a given society" (Nasar & Tariq, 2012, p. 179). Interculturalism, in its term, can be viewed from the perspective of something less "groupist", more open to the synthesis, more committed to a stronger sense of the whole (for example, in terms of social cohesion and national

citizenship) (Nasar & Tariq, 2012). Overall, this intercultural dialogue, fostering personal growth (the respect for others, the sense of human dignity, the ability to listen to people, etc.) as well as cooperation and participation on the base of common purpose, is a reflection of political, social, cultural, economic integration and the cohesion of culturally diverse societies (Council of Europe, 2008).

Therefore, immigrant and host cultures may change and it sequentially leads to the intercultural resilience building. The term “resilience’ in the framework of social sciences can be considered as an individual’s ability to overcome various challenges and to display positive adjustment. Resilience expresses personal ability to cope with adverse circumstances. This ability directly depends on social features (OECD, 2018). It means how successfully and effectively people can interact and manage themselves, their relationships and their business demands in international cultural environments (Liao et al., 2021).

In terms of immigrants, cross-cultural adjustment is the crucial factor because high intercultural resilience allows paying more attention to adjusting to the new lifestyle, activities and various assignments. Intercultural resilience has three major dimensions: general, work and interaction adjustments that can be achieved in interacting in formal and informal situations (Liao et al., 2021).

Culture presents visible (artefacts and products) and invisible (values and beliefs) layers and it is “both an individual as well as a social construct social” (Simonsen, 2008, p. 26). Simonsen (2008) distinguishes following competences for people to be able to understand and accept these layers and, therefore, to develop intercultural resilience:

- To have adaptation skills means to be able to get over culture shock and to enrich experience;
- Being respectful towards cultural features and being interested to make conclusions after communication with members of the host society;
- To have an understanding of the concept of culture and how it influences life;
- To possess knowledge on historical and social-economic conditions in the host country;
- To create social and professional relationships;
- To be self-aware;
- To balance between adapting to the host culture and maintaining own cultural identity;
- To have desire to contribute to the welfare of all citizens.
- To be an active participant of the host culture.

### **Network factor as an important aspect for intercultural resilience building for immigrants**

Communication and culture are closely interconnected because culture is reflected in every interaction between people. Quang (2006) offers to use three types of communication in one culture and across cultures:

1. Intra-cultural communication happens between people, who live in the same country and come from the same cultural background;
2. Intercultural communication is a communication between people within one country but between those, who have different backgrounds;
3. Cross-cultural communication is realized between people, who reside in different countries and, consequently, have not the same backgrounds.

According to Orton (2012), there are several components for positive interactions between the receiving society and immigrants: Policy environment that promotes different dimensions of integration; The spaces and times for communication; Skills that people possess to interact; The processes for supporting positive interaction; People and organizations that encourage communication between immigrants and people within the receiving area and tend to overcome any challenges.

Adaptation and integration processes are influenced by kin and friendship ties, neighbourhood based networks and membership in different associations sharing customs. Therefore, intercultural communication is promoted by social networks based on family or household, friendship and community ties and relationships (Boyd, 1989).

Intermarriage is an example to show that relations between members of different groups are socially acceptable and to reduce frontiers between these groups (Gsir, 2014). Domestic units constantly create kinship networks that exist across space and provide information and assistance.

The other type of social interaction between immigrants and members of the host country is friendship. Social contacts between different groups have positive effect on perceptions and reduce negative attitudes (for example, prejudices) with the help of exchanging of socio-cultural codes, practices and languages. Then, friendship can influence employment and searching for job thereby helps immigrants to integrate into other cultures, for instance, work culture (Gsir, 2014).

Gsir (2014) defines workplace as a “space in-between the private and the public spaces”, where the issues of cultural diversity management and social interactions between colleagues from different ethnic backgrounds appear due to the diversity. Three factors affecting relations in work environments - the sense of achievement, the sense of belonging, the sense of equality – benefit to create strong bonds because people less pay attention to ethnic differences but they are all united by common goals that have to be reached at work.

The great majority of communication between migrants and host society happens in the context of daily life in the neighbourhood (Gsir, 2014). In comparison with workplace relationships, these ones are not compulsory and they are fortuitously because sometimes individual choice is not critical. The variety of opportunities, where people can develop this kind of interactions, is vast: from meetings in the street, in parks or public transport to neighbourhood events, involvement in local associations or festivals. Neighbourhoods provide culture diversity through the infrastructure (for example, schools, hospitals or green areas), which is a part of every urban space. All these aspects incite people to the coexistence of residents and frame social interactions despite ethnic differences and stereotypes.



In addition to it, the study of Bratsberg et al. (2021) has proved that the initial neighbourhoods, in which refugees live, and their characteristics are highly predictive of future electoral participation. In this case, it can be said that communication with politically engaged networks plays a key role in shaping political integration and participation over the long run. This research also emphasizes that “the first 3 years after arrival may constitute a critical “integration window”, in which context plays a key role in habituating modes of interaction with the host society” (Bratsberg et al., 2021, p. 562). Governments should focus on improving levels of support and engagement with host communities in terms of politics during the period after arriving to these new communities because in order to be politically integrated immigrants have to feel the adherence to democratic values and trust in the political institutions. The important aspect of the dimension of political integration is the identification with the host society and it can be reached with the help of friends and acquaintances among non-migrant population.

There is a wide range of spaces, places, services and occasions (community festivals, walking in parks, going to the work, sport events, etc.) that can provide opportunities to interact. These different social and cultural practices are capable of being important instruments in social policy that reduces anti-social behavior, improves community cohesion and safety. Setoodegan and Pettersson (2021) refer to the study that indicates that the involvement in group activities, even short term or one-off events strengthens bonding and linking connections because they touch many fundamental personal, social, cultural, and economic needs. Results of Setoodegan and Pettersson (2021)`s work have proved that outdoor cultural activities can be conducive in establishing and re-establishing networks with other foreign-born people and local community and provide cross-cultural interactions.

Nevertheless, some of these occasions are tend to be segregated between people from different backgrounds even in terms of a lack of information about the possible opportunities and availabilities (Setoodegan & Pettersson, 2021). Orton (2012) has developed the chain of recommendations, which are basic for various programs supporting communication between immigrants and the receiving country:

- Create diverse opportunities for public interaction (local festivals with themes connected with cultural diversity; shared activities between members of different groups in community centres; charities to cope with poverty both for immigrants and residents);
- Develop improved skills for interaction among immigrants and members of a local community to overcome barriers;
- Develop the process to support and promote effective interactions through active involvement and training (for instance, in civil society organizations);
- Promote recognition of immigrants` positive contribution in a wide range of ways (for example, socially or economically);
- Empower immigrants` participation involving actions that give them opportunities to display their skills and to contribute actively as agents for integration, development and social cohesion;

- Analyse the work of policymakers in the context of promoting or inhibiting interaction and lead the to develop policies which make the most of the potential arising from the multiple aspects of everyone`s identity;
- Recognize and respect the complexity of diversity through creating the environment where the needs of everyone involved in the process;
- Build stronger networks across diverse groups based on multiple connections and afflictions.

Overall, positive interactions directly influence how individuals feel that they belong to particular communities, places and countries. Moreover, positive interactions is a way to learn and change by understanding others and their culture better.

### **The Intercultural Cities Programme: conception and realization**

Landry and Bianchini (1995) proposed the idea of the cultural transformation when they highlighted and justified the need for creative thinking in order to overcome new urban issues and the 'synthetic' and 'cross-disciplinary' nature of creativity. Moreover, they set some factors that can help a city to become creative. It is worth to say that contribution of immigrants in terms of their various ways of looking at problems and different priorities as well as interculturalism that leads to new ideas generated through cultural crossovers are mentioned in the list of these factors. The authors also emphasized the importance of a balance between maintaining a separate identity and integrating into the majority community.

Nowadays a lot of countries throughout the world create different programs, which meet recommendations mentioned above, to assist intercultural dialogue.

Wood (2009) writes that the Intercultural Cities Programme (ICC) began in 2008 on the initiative of the Council of Europe and the European Commission to watch how people live together in real life and, thereby, identify useful strategies and policies that help cities work with diversity as a factor of development. The ICC was born out of the combination of three other initiatives: Council of Europe White paper on Intercultural dialogue that was focused on the development of "people diplomacy" idea and building of united space through youth work and non-formal education; European Year of Intercultural dialogue, in the context of which the ICC programme appeared; research project "Comedia" that offered the original conception of the Intercultural Cities Programme. Demographic challenges, people, who constantly move around the globe, and different urban policy approaches to the diversity have impelled to regulate and control inter-relationships at the state level. The programme spreads throughout the world and involves politicians at several levels, non-governmental organizations, migrant associations, public service, business and media, education and cultural workers. The main idea of the project is to create the model of an intercultural city, which can be characterized in the following way: the intercultural city is a city where people with different nationalities, origins, languages and religions regard this diversity as a resource not as a problem; moreover, this idea is strongly supported by the authorities that ensure equal opportunities for all by adapting its structures, institutions and services to the needs of a diverse population. To realize this

goal 11 pilot cities - Berlin-Neukölln (Germany), Oslo (Norway), Izhevsk (Russian Federation), Patras (Greece), Lublin (Poland), Reggio Emilia (Italy), Lyon (France), Subotica (Serbia), Melitopol (Ukraine), Tilburg (the Netherlands), Neuchâtel (Switzerland) – were chosen to develop pervasive intercultural strategies for the management of urban diversity, to review policy on the basis of an intercultural approach to migration, integration and social cohesion and to create a model of an intercultural space, which will encourage other cities all over the world (Wood, 2009). In 2021, the number of cities participating in the ICC project has raised up to 153 (Council of Europe, 2021). The survey results given by Council of Europe (2015) in its final report shows that people, who live in the cities of this programme, agree with the fact that its services correlate with their city's needs (strongly agree: 27,8%; Agree: 37%; Partially agree: 29,6%; Do not agree: 1,9%).

The ICC helps cities to build an intercultural city reviewing activities through intercultural lens. It means that the concept of it does not require adding new policy, structure or initiative to existing ones (D'Alessandro, 2021). D'Alessandro (2021) says that it is very important to consider some essential elements before the formation of the image of an intercultural city because they persuade people of the variety of advantages that the idea of the intercultural society brings public commitment to diversity and increasing public awareness of the diversity advantage with the help of social media stakeholders and debates.

These elements also allow reflecting the values base, which is rooted in intercultural strategies – trust, commitment, transparency and responsibility for actions.

According to the ICC experience, which is described by D'Alessandro (2021), a city strategy can be structured in many ways but there are 16 important elements, which should be taken together and implemented to impact on public perceptions and public policies alike and to develop collective dynamics towards using diversity for the benefit of the city and its people. These elements include interaction, participation, anti-discrimination, welcoming newcomers, education, neighbourhood, public services, business and labour, cultural and social life, public space, mediation and conflict resolution, language, media and communication international outlook, intercultural intelligence and competence, leadership and citizenship.

### **Influence of the network factor in the Intercultural Cities Programme**

The network factor is traced in all key elements that are necessary to create an intercultural city with a strategy proposed by D'Alessandro (2021). The examination of these ideas with the examples from cities that are members of this project will clarify it.

Social interaction between people from different backgrounds should be based on the equality and recognition of each identity. The government of the intercultural city implements this idea in its policy and actions for the intercultural mixing. Providing various public spaces and informing about visiting such places like intercultural centres or museums or other facilities (for example, benches, tables, giant chessboards, playgrounds) unites people of all origins, ages and genders to meet, interact and to develop sense of belonging to the current place of living. The XEIX project in Barcelona (Spain) fosters intercultural relations in multi-ethnic districts through raising the level of interaction of

businesses with each other and their communities. A Retail Association has become an initiator of local economic and social activities (fairs, shopping campaigns, exhibitions), where shopkeepers and private enterprises can join for the local development with the help of invited intercultural mediators, interpreters and experts (D'Alessandro, 2021).

Participation can happen in different ways (formal or informal) and in different spheres (civic, political or cultural) but, in general, it means involvement of all residents in the various decision-making processes that affect life in the city. Networking runs like a golden thread in all participatory processes because they consist of the great number of open spaces and channels so that citizens, political leaders and practitioners can work together. My Neighbourhood project in Reykjavík (Iceland) is an annual budgeting event in collaboration with the City of Reykjavík. Citizens have opportunity to share their own ideas on how to improve each neighbourhood. (Reykjavík, n.d.). This project is unique because it can make all districts of the city a platform for vivid intercultural exchange and example of a multicultural space because its participants share experience from all over the world.

It is impossible to cope with discrimination without direct influence of the network factor. People can be discriminated on various grounds (religion, gender, race, language, culture, etc.) and this oppression is a result of prejudices people hold. Consequently, governments of intercultural cities have a responsibility to create opportunities and conditions for citizens to experience the advantage brought by diversity in everyday life. Milan, Palermo and Turin (Italy) launched the project called “#IORISPETTO” in 2018. Its realisation consists of trainings for intercultural mediators, teachers, and volunteers as well as workshops and labs at school to raise awareness of an understanding of the ways of interpersonal and media communication (CIFA, n.d.).

There is a great number of people, who feel disoriented after arriving in a new country. Therefore, cities have to show that they are open for intercultural relations between newcomers and native residents. An Inclusion 2018-2021 Action Plan in Montreal (Canada) covered different areas of the urban life in the city and took various measures to integrate newcomers, for instance, the website of the project says about working with diversity and helping newly arrived get oriented by the promotion of closer ties with Indigenous communities (Montréal, n.d.).

School can act as a place with an inclusive society, where the attitude to cultural differences can be formed at an early age. School is a space where it is possible to struggle with prejudices through the physical, pedagogical and social environment that it creates. The intercultural dialogue and partnership between teachers, parents and children, which happens due to ethnic diversity of a school staff and mixing of pupils, interaction with local communities, performance of diversity in the school's design, can lead to the feeling of being accepted in a host country as it happened in The Campus Rütli school in Berlin (Germany). The school invites parents, children and young people to participate in the educational decisions and school life in general. Moreover, it supports the desire of immigrants to be taught in their native language (D'Alessandro, 2021). These actions not only help to accept newcomers but also they allow forming positive attitude from the side of

migrants in relation to the host side. All in all, education and the ICC project are interconnected in terms of the ability of newcomers and the host society to be more culturally sensitive.

The importance of the level of neighbourhood cohesion has already been discussed in this work. This is the reason why the intercultural integration approach in the cities of the ICC programme is worth authorities' attention. The methodology of participatory mapping of the diverse intangible heritage features, which is used in Lisbon (Portugal) and Rijeka (Croatia), emphasizes the pluralist identity of the community (D'Alessandro, 2021).

Public employees reflecting the ethnic and cultural background of the population should present the intercultural city or it will be hard to integrate policy based on safety and care. Interactions at workshops, discussions and other informal meetings encourage civil servants creatively confident and open to citizens in means of any projects. The police in Fuenlabrada (Spain) has created the special unit called Team for the Police Management of Diversity to serve its local diverse society and to engage it in making the city safer (Council of Europe, n.d.-a). Moreover, the ICC program promotes the expansion of knowledge about managing cultural diversity among cities administration staffs.

Therefore, this knowledge lead to the fact that the city can offer the bigger amount of social, economic, political and cultural opportunities for immigrants' integration.

Recognition and optimal use of immigrants' skills are drivers of the sphere of the entrepreneurship's growth. The most comfortable environment for immigrants to reveal their experience is a situation when they are treated as native workforce. The Siemens Company regularly invites skilled asylum seekers (D'Alessandro, 2021). This practice is useful for all sides of the project: immigrants have chance to try their professional skills, employees cope with bias against refugees and the company itself can get some advantages from the potential of highly qualified asylum seekers.

The organization of leisure activities, where cultures are shown as changing phenomena flourishing because of the cultural interaction, is the best way to unite people from different backgrounds in unrestrained atmosphere. The project "You Are part of History" of the Centre of History of Montreal (Canada) unites cultural communities from Quebec and local schools to make children, who have just arrived in a new country, feel as they are at their homeland: on the one hand, they know more about the history of the host society, on the other hand, they also share their history through making videos about important things they took to Canada (The International Observatory of Mayors on Living Together, n.d.). People taking part in different types of cultural activities demonstrate their intention to exchange with representatives of other backgrounds.

The role of intercultural public spaces is to decrease the fear of immigrants and to make it easier for native citizens as well as immigrants to meet others. The creators of these places, at first, have to pay attention to people and their stories about how they use one or the other place and, then, to work with these people to translate it into real life. Besides the fact that place-making specialists in Barcelona (Spain) have to be aware of the diversity and its management, the city erects places that potentially can be the environment for spontaneous interaction between their users (for instance, playgrounds, bicycle or walking paths) (D'Alessandro, 2021).

The process of intercultural integration consists of conflicts between people, who are on their way to understand other cultures. Social arguments mean that people get to know each other but they are in need to be directed in the friendly way of acquaintance. Therefore, an intercultural city rigorously chooses opportunities for the growth emerging from the conflict resolution. D`Alessandro (2021) writes that the city of Bergen (Norway) has set up a municipal mediation service that is available in neighbourhoods or even on streets to meet residents and discuss their contradictions.

Language is a key tool to better understanding between people, to contribute to the wellbeing and to develop the new identity of immigrants in the host country. An intercultural city has responsibility to respect multilingualism those influence expresses in the situations, when immigrants can reach information in their native language and not be distracted by the language barrier factor and when they are able to learn the language of the host country and not be isolated from the current agenda and native speakers in this country. Izhevsk (Russia) offers a wide range of opportunities for language development: free Saturday and Sunday school classes to learn mother tongue language; bilingual schools; film festivals or other events celebrating the intercultural exchange, newspapers that are held and published in different languages (mostly Finno-Ugric) (Council of Europe, 2019).

Nowadays the power of social media is beyond people`s comprehension. The factor of social interaction or network factor exists in the sphere of social media. People should have access to the resources that reflects ideas of the coexistence and positive approach to diversity management and, more importantly, they have to be able to discuss it in the Internet. People in Tenerife (Spain) have chance to get advantages from these both actions: they not only watch how the communication working group popularizes activities promoting social integration and diversity but they also can upload their own materials and news, which are connected with this topic, and discuss them (D`Alessandro, 2021).

The positive perception of immigrants can be built through trading and tourism. Native people feel benefits from prosperous economic and strangers find it friendly and accessible to enter into the business, professional and social networks. Economic Alliances as Auckland`s Tripartite Economic Alliance (Auckland (New Zealand), Guangzhou (China) and Los Angeles (USA) gives larger investment and trade opportunities for the local business and fosters intercultural relations during annual summits.

Leadership and citizenship persuade people to feel political and social belonging because the city, where residents of different origins can be involved in the democratic processes of their residence, is a point from which people can build their lives collectively using ideas, competences and capacities of all people inhabiting the territory. The example of trustful relationships between authorities and the society takes place in New York (USA), where people can directly decide how to spend the certain part of their budget. Native citizens and foreign-born residents are able to generate ideas of improving community spaces (schools, parks, libraries) and vote for various proposals.

## Conclusions

Intercultural intelligence, resilience and competence are basic requirements of each city that is declared as an intercultural one. The sensitivity to other cultures is a way to improve social cohesion and a better quality of life in diverse cities. The network factor is a key element to reach an agreement between people from different backgrounds and concomitant strategies, which acquire forms of authorities' actions, create a friendly environment in their places of residence. Council of Europe (n.d.-b) provides demonstrative examples of how people feel positive influence in the area of social interactions: the great majority of respondents agrees that they less experience conflicts (more than 60%); in contrast they feel trust between representatives of different cultures (more than 70%), better neighbourhood relationships (more than 75%). More and more people can say that the urban environment is safe (more than 65%) and it can be one of the reasons that they express openness and tolerance (more than 65%). It directly influences the feeling of belonging to the society with equal rights and duties among the whole society (around 70%). Overall, these ideas set up an image of diversity in the eyes of public (more than 65%).

To sum up, it is worth noticing that the network factor is also important for proper development of the ICC Programme because joint intercultural projects resulted from the partnerships between diverse cities are able to expand this project on a larger scale all over the world.

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*Gabriella Gaál*

*THE CITY AS MEMORY IN CONTEMPORARY POLISH WOMEN'S  
LITERATURE*

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Abstract

The research is based on the hypothesis that geographical spaces reflect the imprint of social, political, historical and cultural life. Spatial representations of settlements are the projections of social crisis and historical periods. The city has its own vocabulary and language, reflected in its buildings and spaces. These 'speaking' cities are open in space and time, and become theatres of self-writing, as the spaces of the city try to find forms of expression to see unspoken traumas, that is, theories of the city are also theories of the subject.

The main question of the investigation is: what are the specific possibilities and challenges for Polish contemporary women's literature to mobilise social memory and to create possibilities for confronting the traumatic past? Using examples from Olga Tokarczuk's novels *Dom dzienny, dom nocny* (Day House, Night House) and Joanna Bator's *Piaskowa Góra* (Sand Hill), I will present the relationship between memory and coming to terms with the past in the historical context of East-Central Europe in Poland. In particular, I will focus on the ways of reflecting on historical events of the Second World War and the regime change of 1989.

A further aim of the research is to explore how Polish women's literature after 1989 attempts to come to terms with the great social traumas of the twentieth century. In the following, I intend to examine the fictional representation of the culture of memory of the 1989/90 regime change in the body of contemporary Hungarian and Polish women's literature in order to find a common intersection of Central and Eastern European literatures.

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*Keywords: urban theory; spatial politics; Polish literature*

**Introduction**

This paper uses examples from Olga Tokarczuk's novel *Day House Night House* (2014) and Joanna Bator's novel *Sandy Hill* (2009) to illustrate the relationship between memory and the processing of the past, the ways of reflecting on different historical events and the different interpretations of the city. I start from the hypothesis that urban and geographic spaces are political, cultural and social reflections, and that, as a consequence, the cityscape is always an imprint of history. Settlements are spatial representations, while buildings are silent traces, projections of social crisis and historical epochs. The city has its own vocabulary and language, reflected in its buildings and spaces. These 'talking' cities provide a kaleidoscope of social and cultural change, as they constitute an interdisciplinary category that can be interpreted from sociological, psychological, geographical, political and historical perspectives (Szewczyk, 2015). The sites that are presented in my writing are not permanent, they travel in time with memories and migrating inhabitants,

functioning as a kind of non-places. For both Tokarczuk and Bator, the places live mainly in memory, in meaning, and unfold storylines of cities that have not yet begun to speak, but are now beginning to take shape as previously silenced experiences. The city is a space with a complex structure, whose changes affect the lives of the actors, and the altered space affects the identity of individuals.

## **Dimensions of memory**

### **Relationship with the past**

Focusing on memory helps to reveal the narratives of the past, to show how identity is constructed through language and discourse, while these constructions also build a larger group consciousness. In revealing memories, we reveal representations of reality, but to tell any story we need a selection of what is recalled. Some memories may be interconnected, while others are disconnected and dissonant. Sometimes individual memory is at odds with collective memory and remembers things differently, things that the official narrative condemns to silence and oblivion. The traumas of the unprocessed past can be dangerous and processing, remembering, is necessary to move on, i.e. it is an integral part of transition.

According to Jan Assmann, the question of identity is also a question of memory (relation to the past). The past is reconstructed by remembering, and the past is preserved by entering into a relationship with it. Shared knowledge, rules, values and memories of a shared past can bind separate individuals into a community. The capacity to remember is an individual skill, but a culture of remembering is also a social obligation, and seeks to prevent forgetting. In defining collective memory, Jan Assmann (Assmann, 2004). emphasises that the group, like the individual, uses the past as a building block of self-image. In summary individual memory is always socially determined, since collective memories are interconnected and individual memory becomes the site of these interconnections. Memory is thus the result of the experiences, sources and ideas of different groups, to which the individual is also linked (Assmann, 2004). Based on Jan Assmann's summarizing work, the external dimension of memory has four sub-areas: mimetic memory, memory of geography and objects, communicative memory, and cultural memory. For the purposes of the present study, it is useful to analyse memory as preserved by places and objects in more detail. For thousands of years, man has surrounded himself with objects, which reflect an image of his personality and identity and remind him of himself and his past. But the city, or the landscape itself, can also be a living organism for the individual (Assmann, 2004). This is why the spatial frames of memory, in the inhabited space, are of paramount importance. Emphasis is placed on the material world surrounding the self, the physical environment, as they have an identity-forming and identity-creating function, which can make them symbols and serve as a reference point for memory. Following Jan Assmann's line of thought, it can be stated that memory uses spaces and places as symbols, semiotising them and using them as spatial metaphors (Assmann, 2004). Urban and geographical spaces are also political, cultural and social reflexions. Just as memory does not preserve the past as such, neither does the cityscape or the landscape, but only

what society is willing to reconstruct or what it can confront. The reconstruction and transformation of the past is constantly taking place under the influence of the present.

The city and space define us, as they can become symbolic and create personal and collective identities, and thus write the subject. For Tokarczuk, the focus is on the countryside because the countryside has always had a kind of fundamental melancholy: the disappearing space and discourse. Theories of space are also theories of the subject, for example, the city as a vehicle of social factors and as a landscape of human relations and memories (Bókay, 2006). Space is also a constituent of the subject, the subject also embraces spatiality. Space is linked to instincts, desires, goals, power, emotions and actions, all of which affect the life of the individual. For example, the spaces, buildings, structures and textures of the city become part of the individual's sense of space. (Faragó, 2006) For Tokarczuk, the house symbolises isolation, retreat, protection and shelter. It gives the illusion of stability to the individual, for whom the house is interpreted as a representation of the centre of the world. The house is a spatial representation, a projection of social crisis and historical epochs. In other words, the city has its own vocabulary and language, reflected in its buildings and spaces (Szalewska, 2014). In addition, I would like to add that it is also possible to interpret the city, which has been damaged many times by historical events and the signs on its surface have different symbolic meanings, from the point of view introduced and used by the corporeal narratology. Through the traces left behind (crumbling houses, empty streets), the nation and the individual in it experience the destruction and relive the memories evoked by the object. For example, in the selected novel, the houses of Nowa Ruda (formerly inhabited by Germans), are open wounds on the surface, eternally reminding us of the past and cultural heritage of the German minority (e.g. their architectural habits, their work ethic). The Poles who moved in to replace the Germans (after 1945) could not cultivate the land in the same way and the environment was left to decay. The houses and the objects found in them, the traces of the Germans, evoke a bygone world, but are a constant reminder of the foreignness of the settlers and the broken cultural continuity. The settlers are Poles who left the old Polish lands after the war, left the eastern territories (Belarus and Lithuania, occupied by the Soviets) and then occupied the western parts of Poland, moving into the homes of Germans, who were deported from Poland to German territories.

The buildings, with their concrete weight, give access to hidden traumas and wounds, and speak through memories in literary representation. Kornélia Faragó's theory also supports the appropriateness of drawing parallels with corporeal narratology. The aforementioned literary historian explains that the characters' interpretations of their bodies are also subject to the modification rhythm of spatial reflections. Corporeal (corporeally real) reflection cannot avoid the spatiality of the body, the spatial-structural interpretation of the body. Space is the medium in which the body is realised as body. And the cultural medium is of paramount importance in interpreting the corporeal conditionality of space (Faragó, 2006). It is an interesting parallel that, according to Tokarczuk, people are structured internally like houses: rooms, atria correspond to the individual chambers and passages of the body. Furthermore, the furnishings of houses reflect people's personalities, and when you enter a house, it is as if you are entering the body and thoughts of

another. Marta's house is also like the old wig-wearing woman: it lacks the possibility of the future and turns the past into objects. There is only one moment in it, the "now", the infinite and omnidirectional present.

In Joanna Bator's novel *Sand Hill*, Wałbrzych and the Sand Hill panel monster take centre role. The whole town is dominated by the smell of coal dust and the communist period to which it owes its rise. This Lower Silesian town, once inhabited by Germans, was filled with foreigners after 1945, who moved into the houses of the now displaced Germans and came from distant parts of Poland as part of the population exchange programme (the same historical thread is also developed in *Tokarczuk*.) Many foreigners arrive, robbed of their roots by the Second World War, but willing to build a new Poland in the hope of a different life. At the same time, the inhabitants of Wałbrzych have no memories of the past, or dare not face up to it, and those who have lost their roots are unable to connect with the new space and are greeted only by hopelessness. In essence, we get a historical overview from the World War through communism to the turnaround of the regime. The city of Wałbrzych has two faces: on the one hand, an industrial centre on the surface, and on the other, a real mining town underground, with endless corridors of black water and no idea what lies beneath. Bator has a digging motif, as does *Tokarczuk*, as everyone is constantly digging, either for coal or to find objects hidden by the former German population, which they believe to be treasure. In Bator, the motif of the panel within the city is central, as the monster on the sandhill means different things to each of the three female figures: for Zofia, inaccessible; for Jadzia, paradise on earth; for Dominika, a stifling, repulsive environment. Each woman wants to live a life different from the one her mother has shown or handed down. For Jadzia, the dream under communism was when they were allocated an apartment in a new housing estate, which even had district heating. For Dominika, this environment was strangler and abrasive.

To illustrate the interpretation of the city's squares, it is worth staying with Bator's novel, where the park was still a central meeting place, a place for conversation and walking, where Jadzia and Stefan could be safe, but it became increasingly dangerous due to attacks and robberies. Dominika no longer likes walking there and is afraid that drunk men (including her father Stefan) will destroy the harmony of the place. It also shows that the city's spaces are not used equally by its inhabitants. For example, when Jadzia first arrived at the town's train station, she felt ashamed at the pub by the station because she had never been alone in such a place before, while the men confidently measured and dominated the space. But equally at the park, a dangerous area for children and women, while for the drunks who dominated it, it was a place to let off steam. Dominika was born in the city and takes for granted the way she participates in urban social life, while her mother and grandmother had to learn to do so. For Dominika, Wałbrzych represents anxiety and a desire for more, not the sight of mines and chimneys, or the desire to spy on her neighbours as the other residents do. He would rather be nomadic than live in a place he doesn't feel is his own.

## Wounded cities

It is interesting that Tokarczuk's novel bears in its title the duality that characterises the world of the text, the atmosphere of the elusive and transitory states between waking and dreaming, day and night, present and past. This duality also symbolises the two-faced nature of the world. On the one hand, the "day house" is a geographically delimited world of reality. The house is the building where people's daily lives take place and, together with its surroundings, it represents home. On the other hand, the "night house" has no specific title, it is a world of dreams, of the elusive. The dualism and simultaneous existence of the two define our reality. We live in both the day house and the night house, remembering night dreams during the day, which act as a bridge connecting the two worlds. As the title suggests, the central motif is the house, which is a specific location, since the narrator and his partner move to Nowa Ruda, a small Silesian town on the border between the Czech Republic and Poland, to spend the period from March to November. But the real setting exists in the text only to provide a basis for the mystery and the world of dreams. The phrase 'house at night' in the title refers to this. On the other hand, the house is a symbolic image that encapsulates the past and present of the whole region. In fact, it is the imaginary Lower Silesian town of Pietno and its surroundings that becomes the protagonist of the story. After 1945, the village in the depths of the picturesque Kłodzko Valley was almost completely deserted. Because of its particular location, the sun is invisible from October to March, as it is surrounded by the Dry Mountains to the east and south and the Włodzica hills to the west. The grey and lightless winter season gives the settlement a mystical atmosphere. The history of this small village, isolated from the world, is presented with a magical realism and a naturalistic touch, but this dual representation allows the problems to be explored: the grey reality of the Polish People's Republic is revealed, as are the subconscious human fears and desires. In the novel, it is impossible to break out of Nowa Ruda voluntarily, because every attempt results in failure and disappointment, as is evident in Krysia's search for love. The region keeps its victims and does not let them go, for example, Marek Marek could not leave the house of horrors or Ergo Sum returns after the vicissitudes of war or the German population, once displaced, returns as aging tourists. The former German inhabitants returning as tourists also find and are only captured by the empty plots of land.

Public places in the town or city make us feel a certain way and the sight of them triggers certain memories to surface. Referring to Jacques Derrida's interpretation of the city, Jolán Orbán points out that the city is a carrier of memory and promise, but not from the perspective of the present, but from a historical perspective, which is why it becomes open in space and time. They are talking cities that become repositories of memory through their 'traumatic architecture', their woundedness (Orbán, 2004). Both Tokarczuk and Bator maintain the perspective of perpetual motion in their novels, namely by creating the border subject. These characters want to experience the possibility of breaking out of boundaries. But in the novels it is impossible to break out of one's enclosing space voluntarily, because every attempt results in failure and disappointment, as is clearly visible in Delimitation is part of the means of control of power, and crossing borders is not possible,

even dead, because one is still trapped within borders, as we saw in the case of the German tourist Peter Dieter.

It is worth examining the phenomenon of post-industrialisation in the post-communist post-1989 region, which is also present in novels. The change of regime brought the much sought-after freedom, but it also brought to the surface a number of previously repressed grievances, losses and traumas, which led to a lack of identity, an identity crisis and the emergence of new inequalities. To explore these gaps, it is useful to approach them from the perspective of hanthology<sup>1</sup>. Every space is saturated with missing presences, non-functional buildings, and parts that have become playgrounds for deviant social factors. The ruins must be taken into account, as they are an imprint of social, political and historical phenomena. But they are neither dead, nor present, nor living, but intermediate non-places (Horváth & Lovász, 2017). Memory is fixed to a place, but the place is permeable and transparent to power, it can be controlled, but the deterioration renders power inoperable because heterogeneity is restored. Abandoned sites have been symbolically erased from the social field and have hidden meanings. The silence of the ruin confronts us with the impermanent presence of historical traumas and influences the individual with its disturbing remains, because it makes the possibility of shame permanent and makes us aware of the broken. The ruin is also the bearer of rescued stories, a place of memory that expresses the fragility of life tending towards destruction. It is a survivor with a story to tell, but no time or audience to hear it (Hirsch, 2011). At the same time, the ruin is also an uncontrolled space, it belongs to no one and its emptiness cannot be integrated or controlled.

In the wounded landscapes by traumas, ruins speak through their silence, through their unspoken traces of memory, their implied meanings and their unsettling atmosphere. In Tokarczuk's novel, the images of ruin are outlined through the presentation of the sights of Pietno and Nowa Ruda. Marta's friend Agnieszka lives on the hill above Pietno and she has a view of the whole settlement, from her perspective we see the present situation. „She saw the drunk men and the wandering children. She saw the women pulling trees down the hill on their wobbly legs. probably they were also drunk. (...) Shee looked at the stream full of duck droppings, the shadows cast over the whole village, the cats with their fur falling out, the broken machines, the old trails with their broken hair.” (Tokarczuk, 2014. 52.p.) With the disappearance of the communist regime's workplaces, thousands of people became unemployed and suddenly found themselves out of work as the change came, so for many, alcohol was a source of solace. The image of broken machinery may also be a reference to the once working economy. From the description, it is clear that the village is in a terrible state and that total hopelessness defines the lives of its inhabitants. Peter Dieter experiences a similar situation when he returns to his village. Peter did not recognise his village because there were no houses, no yards, no roads, no bridges, and the village was reduced to a skeleton and a few houses, almost deserted. He

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<sup>1</sup> Hanthology: A cultural and artistic movement that emerged in the early 2000s and consists of works that build on traces of the past. They function as a medium that allows the past to be experienced and the rememberers to express themselves. Hanthology refers to the crisis of both space and time.

had an image about the town in his memory and clearly, memories and feelings are connected. Remembering means to have been involved something, perhaps he had dreams about his childhood and when he confronted with reality, the idealised bubbles of memory burst, and suddenly he couldn't deal with the ruins left behind, the non-places that haunted. The childhood's memories and the places of memories made him who he was. But he could not find a grip on his own past, his roots and his inner personality. The town's landscape has changed, he could not deal with the transformation, because he felt that his old memories are fake and didn't have the real places where they were belonging. But Peter didn't recognize the transformation from old into new always involves negotiation, the old is never really gone, it is always present, yet he could not find it. People moved to nearby larger towns in the hope of better housing and living conditions and to enjoy the benefits of modernisation. The characters in the novel are purposeless, merely vegetating and unable to realise their dreams. They are trapped in a vortex of the past and their own histories, or in the endless present. The narrator is no different from them, we do not know her past and no real information about her present situation or goals is revealed, she is like an empty vessel filled with the stories of others.

Like photographs, the ruins also function as an umbilical cord, as they can link the memories of the first and second generations. They show what is no longer there, but they also represent what was, a life that no longer exists, but still goes on (Hirsch, 2011). They are pieces of different stories, pointing towards a larger narrative. Yet their story cannot be encapsulated in a linear narrative, because it is defined by the in-between, and therefore overtly untold, just as in Tokarczuk's case, the narrator does not reveal the history of the region in a linear way. (Horváth & Lovász, 2017) Marta stays on the edge, observing and editing the story threads as she puts together the wigs, mostly listening and observing as a soul-measurer, and her main activity is to see, perceive and preserve. She will symbolically delegate this task, this chosen position, to the narrator by making for her a wig that fits him completely. The wig-maker embodies Polish folk wisdom, and her figure is highly mystical, as is her disappearance at the end of the novel. It seems as if Marta is a fusion of ancient parks, a goddess of fate who washes and cuts the threads of people's lives, symbolised by the wigmaker. In Marta's idea, hair is the guardian and repository of thoughts, and therefore the wig-making process involves carefully weaving together the right thoughts and giving them to the right person. It's like handing over a repository of memories. Marta takes care of Pietno, acting in a kind of caretaker capacity, ensuring that the past is constantly revisited by bringing back memories, that it does not become irrelevant, and delegating this key task to the narrator.

### **Non-places functioning as a crypt**

In the case of the memorial trace, if it remains an uncharted place, even in the form of a ruin, similar mechanisms can be observed as those that Derrida draws attention to in his analysis of the crypt concept. The crypt is a place of absence, but at the same time it guards, watches, hides and recalls as an eternal memento. It creates a kind of false, artificial consciousness in the divided self, a non-natural space, which it creates by isolating it with partitions (Derrida, 2021). It creates an inward-facing, closed and secret space that

keeps out all intruders. This space is one foot in the past or one foot in the future, but always in the time of the dislocated. The dislocated suspension in time is stretched somewhere between yesterday, unable to end, and tomorrow, unable to begin. Somewhere in the Self it keeps itself safe, occupying some secret place. The crypt blurs neither the present nor the past, but precisely the boundary between the two. It is always repressed, but returns regularly and the cultural images of the past haunt the present. These repressions return because they cannot find their place in the fabric of tradition of the Self. What is haunted is not quite present, it does not exist in itself, it exists only in what no longer exists or in relation to what does not yet exist. This kind of haunting resists the constriction and homogenisation of time and space. They are remote forces that have a causal effect without being physically present, for example, through traumatic memories of the past acting in a psychoanalytic way. A fundamental experience is temporal claustrophobia, which is a locked in a future-less present dominated by forms of fear of the undead past (Zemlényi-Kovács, 2020).

The crypt was created by force, by some trauma, some loss, and is destined to remain silent, an indelible mark embedded within the Self. The Self, however, tries to identify with the object it has incorporated (incorporated) and awaits re-formation, but the process is not successful and something alien remains in the Self (Derrida, 2021). Incorporation is a kind of magical incorporation, healing, in which we imagine swallowing the loss, so we also refuse to process and own the lost for fear that it will transform us through processing. Incorporation is in fact a repression, a "refusal to introject loss." (Ábrahám & Török, 1998, p.17) But the longer it is kept in itself, the longer the process of exclusion takes place, so the crypt is also a place of silence, and what is remembered is not the object itself, but its exclusion from the introjection, like a monument. The Self has created the crypt within itself as an external safe, a kind of non-place that has a function similar to that of a winter ruin. In this exteriority, in this non-place, the mechanisms of containment and rescue are important (Derrida, 2021). The crypt contains the traumas that are also responsible for the failure of the introjection. Incorporation is also a cryptic phenomenon in the sense that it hides behind the normal, among the characteristics (Ábrahám & Török, 1998). It is as if in Tokarczuk's novel it is Marta who holds the key to the crypt of Nowa Ruda and Pietno, and slowly, thread by thread, like the mushroom threads cited several times, the repressed, unprocessed tragedies, losses and memories that have not been made part of a collective identity are unravelled. The fungus motif appears several times in the stories and is always presented as a source of danger that can bring death and end life in minutes. The narrator admits that she would like to be like a mushroom because mushrooms are insensitive and can cover the whole earth, they grow anywhere they can get moisture and some species of mushrooms can hypnotise you with their smell, making you stupefied. The main character can imagine his existence as a giant cold mycelium. The mycelium is a collection of fungal filaments, a web of fungal threads that form the part of the fungi that permeates the soil, and the filaments are capable of continuous growth, i.e. they can expand, so they have infinite space and 'power'. The web of the mycelium also wants to become the threads of stories, the set of spores from which the various mystical stories feed and cover the whole world. And at the origin of all this is the narrator, who



has all the story threads concentrated and has a view of the world, but remains apathetic and impassive, and thus observes the flow of things. Tragedies, losses and memories, these threads of history are unravelled at a time when the walls have been shaken, when the historical and cultural space has been transformed by the change of regime. The collective memorial has so far been a tomb that preserved the traumas of the community, an unspoken weight on the lives and destinies of the characters, and the self has been forced to take on the role of a secret-keeping undertaker, unable to face up to its own past or that of its family (Ábrahám & Török, 1998). The fate of these actors shows that they are unable to rebirth themselves, to seize opportunities and to break out of the region. The past is present in their personalities as a piece of reality condemned to denial, but the unspoken, buried alive memories destroy the subjects from within.

An interesting storyline in Tokarczuk's novel is when the narrator first met Taki-a-Taki, when he asked the protagonist for a drink, but noticed the drawing of the blue-eyed guardian dragon on the wall of the house. It is the sight of this picture that unfolds the story of the Beast. Earlier, in the days after the Second World War, after the Germans had been deported, a monster roamed the neighbourhood. The monster hunted chickens, ducks and geese. Residents were determined to kill it, but their various attempts were to no avail. The authorities were busy setting up a new system of land distribution and cooperatives. But once a woman was dragged to the bottom of the lake by the monster, and the authorities could not stand by and watch. Eventually the whole lake was blown up and the monster died. The monster embodies the guilt of the Polish population, both for their role in the Holocaust and for their complicity in the deportation of the Germans. It is the monster that emerged from the crypt of memory, who held the population in terror as a punishment for their failure to come to terms with the past, and its killing is therefore symbolic, because by exterminating it the population is trying to get rid of the past and to follow strategies of forgetting and selective memory.

## Conclusion

The paper has first outlined the theoretical framework that is essential to the treatment of the topic, and has examined the interrelationship between history, literature and memory. I then tried to outline, through selected literary examples, some more pragmatic analytical possibilities that shed light on the ways of processing the past. Furthermore, in the novels highlighted, it was emphasised that memory is geographically determined and that landscape and settlement play an important role, because space is always embedded in memories of past events and identity is strongly linked to geographical locations. The different stories that are presented are like pieces of a puzzle that, when put together, make sense of the whole. By fitting the pieces together, we can see a panorama of 20th-century Polish history, and in it the evolution of the destinies of individuals. The selection of literary texts is not systematic or representative, but is intended to be an initiative that can be continued and extended in further research. The aim of the broader research is to find a common intersection in the representation of the topic in contemporary Polish and Hungarian women's literature and to compare the results with how historical and social science research reflects on the period under study.

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Ákos Németh

*THE GENERATION OF 'THE WANDERING YEARS' – TRAVELING  
CULTURE IN EUROPE AND IN HUNGARY BETWEEN THE WORLD  
WARS*

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Abstract

In my article, I try to offer a comparative view of Western European and Hungarian travel literature between the World Wars. First, I examine the changes of Western traveling culture in the post-war era, then I analyze the narrato-poetic features of the travelogue, as a popular literary genre of the 1920s and 1930s. In the second chapter of my study, I introduce the Hungarian contemporaries of Waugh, Green, or Orwell. They were the generation of 'the wandering years', as it was called by one of them, Antal Szerb. I argue, that the main questions of the Hungarian travelers and narrative characteristics of their works not just simply resemble to the Western authors', but they could give a relevant contribution to the contemporary European travel literature, emphasizing the integration of the thinking of Hungarian intellectuals to the European stream.

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*Keywords: travel literature; post-war generation; cultural history*

**Introduction**

There was a generation of young writers and intellectuals (among others: Sándor Márai, Antal Szerb, Gyula Illyés, László Cs. Szabó and Ferenc Fejtő) who played a significant role in the reshaping of Hungarian traveling culture and travel literature between the World Wars. In my study, I try to introduce their works in the context of the European literature and cultural history.

First, I focus on the changes of Western mentality after the Great War, which led to the changing role of travel also in the contemporary literature, bringing the genre of travelogue in the limelight. I mention both poetic and politic characteristics of travel writings in the 1930s, arguing that these works are very typical of this age, connecting document and fiction to each other.

In the second part of my article, I analyze how the tendencies introduced above, appeared in the Hungarian culture and literature. Rethink of the autonomy of arts and literature was followed by debates also in the Western part of Europe in the shadows of the social and economic crises and threatening totalitarian ideologies of the 1930s. In Hungary, the situation was – if it might be – more serious after the lost World War which was followed by the dissolution of the historic Hungary as part of the Austro-Hungarian Monarchy. These events traumatized the whole Hungarian population of the Carpathian Basin, bringing Hungarian identity into a question. In the late 1920s and 1930s young intellectuals who have mostly lived and learned in Western Europe before, wrote such works as their Western contemporaries, trying to find answers to the serious questions of the place

of Hungary and Hungarian culture in Europe and the world, and to the modernization of the Hungarian society.

My aim is, to emphasize three significant points of the travelogues written by Hungarian authors from the generation of ‘the wandering years’: the question of genre and narration of these works, the changing identity of the traveling and writing self, and perception of the other cultures, forcing the traveler to face himself and his own culture.

### **Changing travel culture and literature in Europe**

Experiences of the First World War and the succeeding social, economic and political shocks played an important role on the transition of Western traveling culture of the 1920s and 30s.

The remembrance of wartime sufferings and post-traumatic feelings of the succeeding years increased the longing of the survivors. Traveling became a lifestyle and also a typical means of self-consciousness and social analysis for the new generation of Western intellectuals between the two World Wars (Fussell, 1980). “We were a generation brought up on adventure stories who had missed the enormous disillusionment of the First War; so we went looking for adventure”, as it was written by Graham Greene (Greene, 1978, p. ix). The English writer and his contemporaries, grown up in the atmosphere of post-war disillusionment, regarded travel rather as a state of being than a source of knowledge, opposite to their Victorian fathers’ study trips. Evelyn Waugh recalls these times in the preface of his travel anthology *When the Going was Good*: “From 1928 until 1937 I had no fixed home and no possessions which would not conveniently go on a porter’s barrow. I travelled continuously, in England and abroad. [...] These were the years when Mr. Peter Fleming went to the Gobi Desert, Mr. Graham Greene to the Liberian hinterland; Robert Byron [...] to the ruins of Persia. We turned our backs on civilization.” (Waugh, 1959, pp. 7-8)

London, Paris and Berlin, capital of the Weimar Republic were above all the intellectual centers of post-war Europe, offering intercultural ‘home’ for political immigrants, adventurers and also for artists, writers and scientists, far from their native land. James Clifford who regarded the hotel as a relevant chronotope of these centers, a site of cultural encounters by dwelling and traveling at the same time argued in 1992 that “I began to imagine rewriting Paris of the twenties and thirties as travel encounters – including New World detours through the Old – a place of departures, arrivals, transits. The great urban centers could be understood as specific, powerful sites of dwelling/traveling” (p.104) This chronotope can be a frame for negative and positive visions of travel – and a lifestyle, too: “transience, superficiality, tourism, exile, and rootlessness” and “exploration, research, escape, transforming encounter” on the other hand (Clifford, 1992, p. 105). Travel was also a typical metaphor of the contemporary literature. It has gained a significant role both in poetry and prose, expressing the subject’s experiences of embarrassment and anxiety, and also unrecognizability of the surrounding world. *The Waste Land* (1922) from T. S. Eliot, *Ulysses* (1922) from James Joyce or Thomas Mann’s *Der Zauberberg* [The Magic Mountain] (1924) belongs to the most impressive works of the age, all having the spatial change as a central metaphor.

It is not by chance, that the age between the two World Wars means time when “travel writing had come of age” (Blanton, 2002, p. 23). Not just, because several excellent authors wrote such books, but travel literature, which was regarded as a less significant genre before, offered authentic means to represent a conflicted and anxious world. Among – and on the footsteps of – the travel writings of such worldwide-known authors as André Gide (*Voyage au Congo* [Travels in the Congo], 1927; *La Retour du Tchad* [Return from Chad], 1928; and *Retour de l'U.R.S.S.* [Return from the U.S.S.R.], 1936), the young generation of writers published such books, as *Journey without Maps* (1936) from Greene, or *Labels* (1930) and *Remote People* (1931) from Waugh, shoving a vision of a modern world, which is in many aspects absurd, chaotic and unrecognizable. According to Casey Blanton (2002) “Waugh, along with Greene and Robert Byron, established themselves as the giants of travel writing in this period by writing books that essentially questioned the norms of the fragmented modern world through irony.” (p. 21) The most important characteristic of these travel writings is, that the traveler’s spatial, geographic change deepens into an immense journey and the parable of his or her age. Outside landscape and events of travel inspire an inside reality weaved by memories and reflections. This new type of travelogue unites the features of “reportage” and “fable”, according to Samuel Hynes (1977) “In the best writings of the 'thirties, the two kinds interweave [...], and produce a dual-plane work with a strong realistic surface, which is yet a parable.” (p. 228) Greene’s *Journey without Maps* is regarded by Hynes as an example of this kind of writing (Hynes, 1977).

According to the Greene’s words cited above, escape and disillusion inspired Western travelers in the post-traumatic years of the twenties, but understanding of political events and description and interpretation of difficult social realities of the restless Europe and other parts of the world, became the most important questions for them in the next decade. The crisis of Western economies and values, and gaining ground of totalitarian ideologies encouraged the writers to rethink the autonomy of literature and role of the author. Hynes summarizes the annoying question of the 1930s, as “the essential aesthetic question of the decade: how can an artist respond to the immediate crises of this time, and yet remain true to his art?” (Hynes, 1977, p. 207) This kind of parabolic art emphasizes the pragmatic function of literature. Intellectuals of the thirties often regarded travel writing as a means for explaining politic ideas. “These beliefs”, as Bernard Schweizer writes “were sought as an antidote to the anxieties and perplexities of the period, just as travel was pursued as a means to clear the fogs of political confusion and to bring about ideological clarifications.” (Schweizer, 2001, p. 8) This attitude resulted often politically engaged works, and even choice of travel destinations were mostly not accidental, to dedicate the representation of foreign countries as political metaphor or allegory for home residents. André Gide travelled to the Soviet Union, sympathizing with the communist idea, but his travel account *Retour de l'U.R.S.S.* (1936) shows his disappointment in the regime of Stalin. The socialist George Orwell travelled to Northern England to meet with coal miners, and write his book *The Road to Wigan Pier* (1937), and returning from the Spanish Civil War, his wartime travelogue *Homage to Catalonia* (1938). While the conservative – and then

fascist sympathizer – Evelyn Waugh draw a caricature of coronation of the Ethiopian emperor in his book *Remote People* (1931).

### **The Hungarian Generation of ‘the Wandering Years’**

Along this time, there was a generation of writers also in Hungary, who were grown up in the free atmosphere of the 1920s, having the opportunity to gain personal experiences about Europe and the great world. Antal Szerb, member of this group of writers called themselves as ‘the generation of the Wandering Years’, referring to an essay from László Cs. Szabó, titled *Búcsú a vándorévektől* [Farewell to the Wandering Years] (1935) (Szerb, 2002).<sup>1</sup>

Young Hungarian intellectuals, coming home from the Western parts of Europe were often shocked by the social and cultural realities in Hungary. Szerb compared the new returnees to György Bessenyei, key figure of the Hungarian Enlightenment, because they felt themselves much more European than their fathers and grandfathers, and after Paris, Berlin, London or Rome, they regarded the Hungarian literature as something very rural and boring (Szerb, 1998).<sup>2</sup> Rethinking the autonomy of literature and the role of writers was accompanied with serious debates also in Western Europe, but it meant a more depressing task for their Hungarian contemporaries. After the lost First World War, the historic Hungary as part of the Austro-Hungarian Monarchy collapsed. Hungary lost at least two-thirds of its former territory with several well-industrialized cities and two-thirds of its inhabitants. Most of them were not ethnic Hungarians, but there were also more than 3,2 million Hungarian people who had to live outside the new borders of the country or to ‘repatriate’ to Hungary (Encyclopaedia Britannica, n.d.). During this time, the new Hungarian state had to face with a serious economical, and social crisis. These changes meant a great shock for the whole Hungarian population of the Carpathian Basin, and also for intellectuals. Their homeland, which was regarded before as part of a Central European power, became a small country in the periphery of the West.

Gyula Illyés, one of the former returnees, later recalled, that in Hungary they have all moved from the avant-garde to a commonly intelligible style (Szávai, 1988).<sup>3</sup> What is behind it all is the need to act against the crisis. The drawing of poetic conclusions is in the line with Samuel Hynes’ statement, because they wanted to write such works which merges documentary and fiction, taking an x-ray of the era (Szávai, 1988). The search for the harmony of the two parallel tendencies registered by the British literary theorist as “reportage” and “fable” (Hynes, 1977, p. 228) can also be observed among the greatest of contemporary Hungarian literature. It can be proved by the popular prose forms among

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<sup>1</sup> Antal Szerb (1901-45) was a Hungarian novelist, essayist and literature historian. In the 1920s he studied literature at University of Graz and Budapest, and at the Sorbonne (Paris). During this time, he lived also in France and Italy, and spent a year in London (1929-30) with a scholarship. He was killed in a labour camp in Balf, Hungary in 1945. He is one of the most famous victims of the Holocaust in Hungary.

<sup>2</sup> György Bessenyei (1747-1811) was a Hungarian noble and writer, who spent his young age in Vienna, as a member of the guard of Queen Maria Theresa. The publication of his drama, *Ágís tragédiája* [The Tragedy of Agis] (1772) is usually regarded as the beginning of the Hungarian Enlightenment. Returning home, after 1782 he lived in rural Hungary in privacy as a countryside landowner.

<sup>3</sup> Gyula Illyés (1902-83) was a Hungarian poet and novelist. He lived in Paris between 1922 and 26 and studied at the Sorbonne. During this time, he belonged to the surrealist circle, as a friend of Paul Éluard, Tristan Tzara and René Crevel.

the generation of Illyés, combining documentarism and parable, as, for example, various versions of memoirs, essays, sociographic literature and travelogue.

Travelogues of the writers born in the first decade of the 20<sup>th</sup> century indicate a new era of travel writing also in the Hungarian literature, based on their constructions of identity and narrative characteristics. Travel narratives published between 1927 and 47 inspire many times such interpretations, which are crossing genre boundaries. Mihály Szegedy-Maszák regards *Napnyugati őrzéskönyv* [Patrol in the West] (1936) from Sándor Márai as a model text, showing the subjectivity of readers' decision about the reading of the work as fiction or autobiography in a provoking way (Szegedy-Maszák, 1991, p. 63). The book, reporting the writer's journey to France and Britain, despite its first person and present tense narrative, which evokes a diary, is subtitled as a 'novel from a journey', while the *Kassai őrzéskönyv* [Patrol in Kassa] (1941), written a few years later, has no genre designation, although its structure divided into chapters could refer to a more voluminous epic work, and – regarding to the topographic references of the titles – also to a travel writing. The title of Ferenc Fejtő's book, *Érzelmes utazás* [Sentimental Journey] (1936) refers to Laurence Sterne but does not provide briefing about its genre, although the title of the original version of the work published in the periodical *Nyugat* (Fejtő, 1935), includes the definition of 'travel diary' and the diary-like format was retained in the later edition.<sup>4</sup> László Cs. Szabó's book *Doveri átkelés* [Crossing at Dover] (1937) is subtitled as *Picture of Western Europe*, while the description of the original edition's blurb also mentions pictures and documentary portrait of the age, as well as autobiographical confessions. But even the much more complex intertextual operations are not far from the contemporary travel writers. Works of Sándor Márai, whose travelogue corpus is comparable to its extent maybe above all to Gide's, are forming a not less complex intertextual space than the works of the French writer. Márai's travelogues reflect on each other and on other works from the writer, often rewriting parts of texts of other genres. For example, some chapters of the *Kassai őrzéskönyv* re-narrates scenes from Márai's novels and from his memoir, *Egy polgár vallomásai* [Confessions of a Citizen] (1934-35), from the differed horizon of the remembrance. In the first chapter titled *Bird's eye view*, the autobiographic narrator compares his journey to Kassa to the description of Péter Garren's arrival to his hometown in Márai's novel, *Féltékenyek* [Jealousies] (1937). While, in other chapters of the work, he narrates such determining experiences from his childhood and genealogy of his family, which may be well-known from his literary memoir for his readers (Márai, 2000, pp. 13-14, 62-83, 83-98).<sup>5</sup> But the most special example may be Cs. Szabó's work, *Hunok nyugaton* [Huns in the West] (1968), referring with its title to the autobiographic novel of Gyula Illyés, *Hunok Párizsban* [Huns in Paris] (1946), narrating the writer's journey to Italy and France with his friend Illyés in 1946-47, while it refers from time to time

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<sup>4</sup> Ferenc Fejtő (1909–2008), known also as François Fejto, was a Hungarian-born political scientist, critic and essayist. From 1938 he lived in France, worked at the Agence France-Presse (AFP), and at the Institut d'études politiques de Paris.

<sup>5</sup> Sándor Márai (1900-1989) was born to a middle-class family in Kassa (now Košice, Slovakia). He lived, studied and worked as journalist and correspondent in Germany and France in the 1920s. In 1928 he returned to Hungary, but after the communist takeover he left his country again. After 1948 Márai lived as exiled in Italy and in the USA. He died in San Diego, California.

to Illyés's own travelogue, *Franciaországi változatok* [Variations from France] (1947). Beside these, travel writings could have often integrate such influences of contemporary novel writing, which were aimed to go beyond the realism: we could find many examples of tematizing of subjective time perception and processes of remembrance, associative narration, mounting fictional and real events on each other in the Hungarian travelogues from the 1930s and 40s. Overall, however, with the loosening of the boundaries between different modes of writing, the interactions of such genres as essay, novel, autobiography and travelogue became more characteristic than we could talk about some kind of one-way effect.

The change of the subject's worldview and narrated identity may be another characteristic of the genre's transformation. Bertalan Szemere, a 19<sup>th</sup> century Hungarian traveler could comment his travelogue, *Utazás külföldön* [Travel Abroad] in the Preface of the work as celebrating the faith in the human activity which fulfils the aim of world history (Steinert, 1983). Accordingly, the typical form of the narration of the identity may be the dissonant self-narration, defined by Dorrit Cohn, as "[a] lucid narrator turning back on a past self steeped in ignorance, confusion, and delusion" (Cohn, 1978 p. 145), by so doing "stress the cognitive privilege of the narrating over the experiencing self." (Cohn, 1978, p. 151) Opposite to it, travelers one hundred years later taking to journey in a permanently changing world which is ruled by inscrutable economic and political processes and in which the identity of the narrator and the unity of his personality is time-to-time coming in question. It arises as a permanent problem, an insurmountable incoherence (Márai), or as a changing quality (Fejtő). The monologue forms coming into view suggest the unfinished past, the changing identity of the narrator, and the lack of perspective. In the case of self-quoted monologue, according to Cohn, "by omitting clear signals of quotation, they run together their narrator's past and present thoughts, thereby suggesting that their ideas on a certain subject have remained the same" (Cohn, 1978, p. 164), thereby closing the gap that separates the thoughts of the past from their narration in the present. While, in self-narrated monologue the text focus on the experiencing self and narrating self is left out of the picture. Monologue forms often refer to unsolved existential crises, like in the case of Márai's narrator, who returns after decades to his hometown on the pages of the *Kassai őrjárat* (Márai, 1941).

The self-quoted monologue may also play a similar role, for example in the last part of Fejtő's *Érzelmes utazás*, during the narrator's Adriatic cruise (Fejtő, 1936). Here it is especially evident that monologue speech itself becomes a part of the transformation of identity and the crossing of its former boundaries, and not just stating it.

At the same time, in these works, in parallel with the identity, the narration of otherness and cultural differences also shows a change. Comparative cultural analyses as indispensable part of the 19<sup>th</sup> century travelogues indicate the impact of the romanticism's idea of 'the people's soul'. For example, Szemere's reflections often concern with the connections between the natural conditions of some countries and the mentality of the people living there. The perspective of travel writers of the Hungarian Reform Age (from 1825 or 30 to 1848) is typically directed towards the future, because they are looking for oppor-



tunities of their homeland's development in their experiences gained abroad. Their starting point is the idea of the national community which is projected to the future, and should be carried out intentionally by the common human activity. Their point of view is commonly universalist, believing in the unity of world history and progress of humankind. Contrary to them, travel writers between the World Wars were surrounded by dangerous ideologies and they felt to be charged by 'the burden of history' with the feeling that their own wills and acts are limited. The past surviving unconsciously in customs and cultural reflexes, determines the present and future, as we can read in the often ironic examples ranked by Márai and Fejtő, while memory is blurring in the passing time. Instead of the search for aesthetic experiences, poetic impressions and points of interest, which were typical of the preceding travel literature, the viewpoints of the new travelers are determined by the analysis of foreign cultures' objects endowed with symbolic contents. This change of point of view also fundamentally determines the way of narration: instead of a postcard-like presentation of visual elements emphasizing an aesthetic experience, confessional and essayist monologue forms come to the fore in travel writings. Zoltán Szabó writes in 1939 reviewing the contemporary travel literature, that their genre is not description but self-examination on the pretext of the landscape, because the horizontal journey of travelers always turns to vertical (Szabó, 1989). The narrator's identity can always be grasped in the difference between the external and the internal environment. The external environment is one for all of them: the landscape with culture, memories and peoples, but the internal environment is different. Márai travels between the landscape and the middle class, Cs. Szabó between the landscape and the books, and Fejtő travels between the landscape and his own emerging worldview (Szabó, 2001).

In this way, the experience of cultural diversity being revealed in European and non-European travels may become a means of confronting the traveler with himself and with his own culture. However, in contrast to the travel narratives of the Romantic era following the 'Bildungsroman' narrative, travelogues of the years between the World Wars generally lack a purposeful development model which could promise the possibility of equalizing differences and thus fulfilling the narrator's identity. The narrator moves on the border of two worlds; the alienation from his homeland's social and political crisis, and the experience of homeliness often found in a stranger cannot be combined within the framework of any great narrative. At home he is exiled from democracy, abroad he is exiled from the homeland, notes Zoltán Szabó about Cs. Szabó, who wrote his Western European travelogue *Doveri átkelés*, while János Kodolányi, talking about the sunlight of Finland, reminds the reader of the homeland's shadow (Szabó, 2001). The voice of the travelogues, which testifies to personal involvement and gives an account of experiences, can thus shed a particularly sharp light on the social and cultural problems that were also the most important topics in the journalistic essays of the period. Above all, symptoms of the European economic, social and political crisis, the effects and spread of the threatening totalitarian ideologies, and the analysis of the responsibility of the scribes, in relation with the search of the Hungarians for a place in Europe and the world.

## Conclusions

The flexible narrative structure of the genre of travelogue has made it suitable for embracing topical themes in the decades of the 20<sup>th</sup> century. During the 1920s and 30s, and then in the years following the Second World War, the Hungarian writers who set to conducting intellectual patrols travelled almost all over Europe, and even to the periphery of Asia and Africa. They looked for the signs of the decline in the West predicted by Oswald Spengler (Sándor Márai: *Napnyugati őrzéskor* [Patrol in the West, 1936] and *Európa elrablása* [The Kidnapping of Europe, 1947]; László Cs. Szabó: *Doveri átkelés* [Crossing at Dover, 1937]); followed in the footsteps of Nordic utopia (János Kodolányi: *Suomi, a csend országa* [Suomi, the Country of Silence, 1937]); or of the Soviet utopia (Gyula Illyés: *Oroszország* [Russia, 1934]; searched for the 'Magical Orient' in the land of the East (Márai: *Istenek nyomában* [In Search of Gods, 1927]); or visited the successor states of historic Hungary and the former Austro-Hungarian Monarchy (among others: László Németh: *Magyarok Romániában* [Hungarians in Romania, 1935]; Ferenc Fejtő: *Érzelmes utazás* [Sentimental Journey, 1936]; Cs. Szabó: *Erdélyben* [In Transylvania, 1940]; Márai: *Kassai őrzéskor* [Patrol in Kassa, 1941]), meanwhile, by analyzing the crisis of European and Hungarian culture and society, the traditions of the Hungarian travel literature were also reshaped.

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*Ildikó Dergez*

*ROLE MODELS IN HUNGARIAN EDUCATIONAL DECREES BETWEEN  
THE TWO WORLD WARS (1920-1938)*

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**Abstract**

The study presents the diverse types of role models that appeared in Hungarian educational decrees between 1920 and 1938. These documents can be found in the official educational journal of “Hivatalos Közlöny” (“Hungarian Gazette”), which functionated as the main form of communication between the Royal Hungarian Ministry of Religious Affairs and Public Education and the educational branch.

It is an essential fact that we do not only find historical examples but also literary and thematic examples of the period. Many of these role models were historic figures such as kings, princes, and other noble people. The next category consisted of famous figures of Hungarian and Latin literature like János Arany, Sándor Petőfi and Horatius. Nevertheless, there were role models outside this typical “historical” spectrum, like thematic days and memorials of fallen soldiers.

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*Keywords: interwar period; history of education; role model*

**Introduction**

After the Treaty of Trianon (1920) leading politicians recognized that education was one of the means of breaking out of isolation. One disadvantage was that many excellent higher education institutions had been moved to the other side of the border by the peace treaty (Csicsay, 2002). The main task was to develop the education system to provide the country with as many 'educated people' as possible (Klebelsberg, 1928). Kuno Klebelsberg and Bálint Hóman, who each headed the Royal Hungarian Ministry of Religious Affairs and Public Education for 9 years each (Klebelsberg: 1922–1931; Hóman: 1932–1938, 1939–1942), were the hallmarks of education in this era. The choice of the period (1920–1938) is marked by the year of the Peace of Trianon and the last year of peace (Ujváry, 2003).

The study examines the role models in the educational decrees issued during this period and presents a summary picture of the characters and events that were intended to present to pupils and their role in education. The study also reveals the intention of the regulations.

**The cultural policy of the era under Kuno Klebelsberg and Bálint Hóman**

As Kuno Klebelsberg explained: My cultural policy is built on two fundamental ideas. I shall endeavour to raise the intellectual level of the broad strata of the Hungarian nation... But we must also see to it that there are men, especially professionals, of an entirely European standard so that in all fields of activity we can rely on ... first-rate forces (1927. évi XIII. törvénycikk indokolása, n.d.).

Following this idea required several efforts. First, he made steps to eradicate illiteracy, as he founded or improved 3,500 people's schools (Ormos, 1998). He advocated the teaching of modern foreign languages and initiated the opening of several civic schools. The main aim of the 1926 law on public schools was to develop elementary education and expand the school network, especially in the small villages and farms located there (Kosáry, 1995). In this area, illiteracy was also high at a national level. By 1930, thanks to the law on public schools, 90% of the population over the age of 6 could read and write. This reduced illiteracy to 10% (T. Kiss, 1998).

He made it a priority to restore the status of higher education and took major steps to this end (Ujváry, 2018). The first objective was to develop professionals, through higher education and academic workshops, who already have European-level knowledge in their fields and can compete internationally. The ministry had improved higher education, the quality of universities and public collections. Many Hungarian institutes abroad have been established and revitalised, particularly through scholarship programmes awarded by the National Scholarship Council to the right young student or teacher (Kosáry, 1995). Klebelsberg's cultural policy was revived and built on existing foundations. One of the most important institutions was the Hungarian Academy of Rome (Romsics, 1982). He helped organizing three universities in Hungary and set up research institutes (Hungarian institutions) in the most important cultural centers abroad so that the Hungarian elite could keep pace with scientific progress. His vision was to revise the decision of Trianon with the weapon of cultural supremacy (Kékes, 1996, p. 254.).

The other adjective used to describe Klebelsberg's cultural policy was the idea of so-called neo-nationalism. In an article, he argued that only the national feeling represented by Hungarian schools can create a real identity for students (Klebelsberg, 1928, p. 61). In his view, a certain kind of nationalism had existed in Europe before – in Greco-Roman culture – and a return to it was an acceptable step (Gyáni & Kövér, 2003).

Bálint Hóman was appointed head of the ministry in 1932 and he remained in charge, with some interruptions until 1942. Klebelsberg's policy of 'cultural supremacy' also influenced his work (Hóman, 1942). He gave scholarships to talented but poor peasant boys to enable them to study according to their abilities as he believed that this was the way to ensure the survival of the country and the prosperity of the nation (Hóman, 1942, pp. 107–109.). During his ministry, the transmission of national ideology in the curriculum became increasingly important (Nagy, 2005). The law of the secondary school system was introduced in 1934 which aimed to reorganize education on a national-Christian basis (1934. évi XI. törvénycikk).

Together, the two cultural ministers of the period contributed to the European standard of Hungarian cultural policy. Despite the unfavourable post-war circumstances, Klebelsberg set the cultural sphere on a course that did not lose momentum under Hóman. The difference between the two is most noticeable in their connection to European culture. Klebelsberg's primary aim was to learn about European processes, to which he devoted the resources of his ministry. Hóman's policy was more inward-looking and aimed to strengthen the 'national Christian' ideology. This did not mean, however, closing in, but could be interpreted as a reaction to external ideological threats (T. Kiss, 1999).

## State role models in the educational regulations of the era

In addition to the concept of cultural supremacy, patriotism and national education were also emphasized in contemporary education. The foundation for this idea was laid by a 1920 decree which specified how the celebrations were to be used. The most important is the joint involvement of teachers, as this is the only way to give them a chance to deal with the challenges posed by history (war, defeat, the Treaty of Trianon). The decree states that the students are the key to the future and survival of the nation. It therefore calls on teachers and educators to nurture students' patriotic feelings and strengthen their character development (Klebensberg, 1928, p. 61). Another guarantee for solving the spiritual crisis was seen in the strengthening of the rural population, which could be a guarantee of national revival (154.490/1920 VKM. rendelet).

In the management of a ministry, the various pieces of legislation have a vital role to play. These provided both a framework and a reference point for the system headed by the Minister of Religion and Education. Laws took first place in the legislative hierarchy, followed by regulations. The central decrees issued by the Minister were intended to ensure the implementation of a specific task and were binding on the persons concerned.

Subsequently, the government used the regulations as a means of assigning the work of teachers. Many of them contained teachings plans and further training courses to make up for the omissions caused by the war. It gives detailed instructions for the subjects of Hungarian literature, the history of Hungary, civil rights and duties, and educational knowledge. The supplement to the decree specifies exactly what kind of students the teacher should educate to become useful citizens of the Hungarian nation. In the subject of Hungarian literature, it mentions as the most important the study of the products of the Hungarian folk spirit (211,081/1919 VKM. rendelet). Great emphasis was placed on the cultivation of national - especially local traditions, and on the study of tales and legends.

The study of the Hymn and the Szózat, the poems of Sándor Petőfi, János Arany, Sándor Kisfaludy and Mihály Tompa, the writings of József Eötvös and István Széchenyi, the novels of Mór Jókai and Géza Gárdonyi play a prominent role in the study of literature, which is essential for basic literary education in Hungary.

In the field of Hungarian history, the decree set out precise objectives. The aim is to understand and learn from the social, economic, and political conditions of the time. The study of historical periods can make students realize that the Hungarian nation was able to rise from even the most desperate situations and start anew (211,081/1919 VKM. rendelet). In this context, the Tatar invasion, the reign of Béla IV, the Battle of Mohács (1526), the heroic struggle of the Hungarians against the Turks, the Rákóczi War of Independence (1703–1711), the reign of Maria Theresa and Joseph II were given special attention. A major focus was on the nationality issues of the dualism era, which many saw as a precursor to the Trianon Peace Treaty. The country's involvement in the First World War is also covered to provide examples for the student. The young people were given a significant role to play and were seen as the hope for the future of Hungary (211,081/1919 VKM. rendelet).

The subject Rights and Duties of Citizens aimed to educate students to become informed citizens. The subject "Education" included lessons in moral education. The decrees

set out in bullet points their expectations of teachers so that the nation might develop. In the case of secondary schools, the emphasis was on general literacy, a love of the humanities and the real sciences, and the acquisition of a sense of national identity (32.400/1936. V. 1 VKM. rendelet).

The shaping of students' character was not left to the classroom alone. Therefore, various so-called thematic days were organized to make students feel that they belonged to the nation as a community. They were no longer passive participants, but active agents. They also introduced the students to the past, culture, and greats of the Hungarian nation, as the guidelines of the regulations stated.

In 1928, Kuno Klebelsberg, Minister of Religion and Education, also published a circular on the 10th anniversary of the end of the war. In this document, the Minister reiterated to teachers what they should pay attention to in the education and training of students. In his opinion, nationalism has been weakened by the international currents of wartime, even though the former is not contrary to the progress of universal humanity (Körlevél, 1928).

National holidays proved to be the most important nation-building and role-modelling events. The students and the population here often celebrated or commemorated important historical events together. During the period, the most important national holidays were 15 March, 6 October and the 400th anniversary of the Battle of Mohacs (29 August 1926), and in many cases the day of the Treaty of Trianon.

The celebration of 15 March was the subject of three different decrees during the period. These specified the purpose and the way in which the celebrations were to take place. The decrees made it compulsory for all schools under the authority of the Minister of Religion and Public Education to prepare the celebrations. They also ordered that the national flag be displayed on buildings to express patriotic sentiments. He pointed out that these celebrations should serve as an example not only for the students at the schools but for the whole nation. The decree pointed out that the celebrations should not only be an example for students in the schools but for the whole nation. In this way, students' and the public's national feelings and consciousness can be strengthened (27,919/1922 VKM. rendelet). In terms of speeches, the regulations were not specific, but rather set out guidelines for institutions. The aim was to convey a hopeful vision that the nation would emerge from adversity despite horrific events.

On the contrary, the 6 October celebration is to be presented to students as a day of mourning, according to the regulation. The exalted atmosphere of the celebration should honor the sacrifice and heroism of the 13 Martyrs of Arad so that they can serve as an example to the youth (9964. V. / 1923 VKM. rendelet).

Different from this was a commemorative ceremony that became topical at the time. The year 1926 was the 400th anniversary of the Battle of Mohács, which was commemorated at the national level. The Minister ordered schools to hold the celebration on the day before the Christmas holidays. The day-long commemorations were, to begin with a church service and then included the National Anthem, the Szózat and the Hungarian Creed as compulsory elements. In addition to this, the collection for a votive church to commemorate the anniversary was extended to schools (2432/1926 VKM. rendelet). To

commemorate the anniversary, a book entitled Memorial Book of Mohács was published, which was aimed at students and school libraries (994/1926. III.b./1926 VKM. rendelet).

The largest group of role models featured in the decrees were historical figures. In total, six such figures can be found in the decrees, such as István Széchenyi, Ferenc József, Ferenc Rákóczi II, Prince Saint Imre, István Báthory and János Irinyi.

Count István Széchenyi was a unique example in the political thinking between the two world wars. He contributed to the establishment of the Hungarian Academy of Sciences in 1825. The purpose of the commemoration was thus twofold: to cherish the memory of the politician and to celebrate the love of science (83.160/1925 VI. VKM. rendelet). The commemorative ceremony allowed secondary educational institutions to collect donations for the Academy, which they could use to continue to maintain it and cherish Széchenyi's works and legacy (87.246/1925. VI. VKM. rendelet).

The commemoration of Franz Joseph I of Austria (or Ferenc József in Hungarian) had a slightly different political aspect. On the 10th anniversary of his death a mourning ceremony was held on 21st November 1926 (Sunday) in the schools. The decree also specified the theme of the speeches to be delivered at the ceremony, according to which the commemoration had to praise the period of Franz Joseph's reign after 1867, especially his active participation in the peaceful development of Hungary (83.501/1926 VKM. rendelet). The authorities warned everyone to refrain from making political references in their speeches and statements and to ensure that the ceremony took place in an appropriate framework.

Two celebrations were dedicated to Ferenc Rákóczi II during the period. One of them was held in 1926 on the 250th anniversary of his birth (17.283/1926. VIII/a. VKM. rendelet), and the other in 1935 on the 200th anniversary of his death (1961/1935. VKM. rendelet).

The year 1930 was one of the most significant to the Catholic students in the period. At this time, they celebrated the 900th anniversary of the death of Prince Imre. His life was intended to be an example of the obedient Hungarian Christian child, according to the decree. His outstanding personality still combined all the virtues that a young noble man should have in any period (500-7/1930 VKM. rendelet). The celebrations were to take place in the month of May, with no special day set aside for the celebration. In addition, several publications were published in honor of Prince Imre this year (820-05-162/1930 VKM. rendelet).

The jubilees of István Báthory (1533-1586), Prince of Transylvania (1571-1586) and King of Poland (1575-1586) were also given great emphasis during the period. In many ways, his person was an example to the Hungarian people. He was the cornerstone of Hungarian-Polish friendship and solidarity since he was the one who united the two nations. The role of Transylvania has always had a special place in Hungarian historical thinking, and its prince occupied a special position. For schools, the first celebration of Báthory was the 400th anniversary of his birth in 1933. The Minister then ordered a ceremony to be held in the institutions belonging to Báthory, the Transylvanian prince and Polish king



(30.093/1933 Va-1). Three years later – in 1936 – another decree was issued in connection with the person of Báthory, namely on the 350th anniversary of his election as Prince of Transylvania (4341–1936 VKM. rendelet).

Besides the traditional historical characters (e. g. rulers, generals), there is also a special character. János Irinyi's (1817-1895) research in natural sciences was notable for the invention of the noiseless and explosion-free match (6268/1936 VKM. rendelet).

The educational regulations of the period sought to set four literary figures as examples for Hungarian students. These included Sándor Petőfi, Imre Madách, Mór Jókai and János Arany. In addition to them, one more person was included in the state's memory (and role models), namely Horace, the embodiment of Latin literacy.

The 100th anniversary of Petőfi's birth was due in 1923, the celebration of which was already provided for in a decree of 1922. The commemoration was compulsory in all schools and had to start the week before Christmas. At that time, the life and works of Petőfi were presented to the pupils in lessons. On the second Sunday after the Christmas break, the Petőfi celebrations took place, the program of which was also laid down in detail. In addition to the central events, the 15 March celebrations also featured Petőfi as a prominent figure. According to the decision-makers, Petőfi's personality could be used to reinforce a sense of community, belonging and hope in the students and the audience (151.999/1922 VI. VKM. rendelet). Later that year, another decree was issued offering a new volume of Sándor Petőfi's works to school libraries (85.505/1923. VIII. a. VKM. rendelet).

The 100th anniversary of Imre Madách's birth was also due in 1923. The decree decided that the author should be commemorated, preferably in secondary educational establishments. In the government's view, the author's work is an example of the importance of listening to the encouraging words of great predecessors, even in the most desperate of times (129.464/1923. III/b. VKM. rendelet).

In 1925, the country's academic world celebrated the 100th anniversary of the birth of Mór Jókai. A special commemorative committee was set up in the country to celebrate Jókai in a fitting manner. One part of this was the memorial to be built in schools, which was laid down in a decree. According to this, a teacher at the ceremony was supposed to highlight Jókai's fervent patriotism, the charm and noble serenity of his poetry. The poet's work has elevated the beauty of the Hungarian language and expanded the strength of the Hungarian spirit (109488/1924. III. VKM. rendelet). In the commemorative year (1925), a commemorative medal of Jókai was even issued to the students, thus bringing the writer closer to the students (2238–1925. VI. VKM. rendelet).

On 22 October 1932, the 50th anniversary of the death of János Arany was commemorated. His person was significant at the time, since he was born in Nagyszalonta, a town beyond the border, and his life's work (poems) and the place where he was born made him an important role model. Arany's poetry was truly Hungarian in its own right, evoking the greatness of national genius when read by students (32.710–1932. V. VKM. rendelet).

The Latin poet Horatius appeared as a special person in his 2000th birth anniversary. In addition to the commemoration, a competition was announced and an article in honor of Horace was to be included in the school newsletter for the school year 1934/35. In

addition to his role in universal education, he was intended as a Hungarian role model for students. His influence was felt by generations of Hungarian poets and literary translators, and through education it became accessible to the youth. Thus Horatius became a major figure in Hungarian intellectual history (30.775/1934 V. a-1. VKM. rendelet).

Two of his contemporary role models are dealt with in separate decrees, such as Ferenc Herczeg (1863-1954) and István Szabó Nagyatádi (1863-1924). In 1926, the Minister of Religion and Public Education ordered the celebration of the 40th anniversary of the former's literary jubilee. The celebration was to take place during the school year, and the program was also set. The program should include the *Hiszekegy*, the Hymn, the *Szózat*, excerpts from the works of Ferenc Herczeg, and a play. The government ordered the celebration in the institutions under its control. In their opinion, the event is an excellent opportunity to deepen the knowledge of the Hungarian national past and to strengthen the love of Hungarian literature (17.554/1926. VIII. a. VKM. rendelet ).

István Nagyatádi Szabó's political involvement made him a role model for students. His character highlights the service a man can render to the Hungarian state through his life's work (50.176-1932 VKM. rendelet). His person was a symbol of peace between social classes and attachment to the Hungarian land. In 1933, on the 70th anniversary of his birth, a statue of him was erected in Kossuth Square in Budapest. A thematic day and commemoration were held in schools (Tamás, n. d.).

One of the most important of these was Heroes' Memorial Day (1924. évi XIV. törvény-cikk). It focused on the heroic dead who died in the First World War. The commemorations were both local and national and took a wide range of forms. In the classrooms of primary schools, the names of the fallen heroes of the local community were to be displayed on ornate plaques in gold letters. In doing so, they set an example of self-sacrifice and patriotism for the students. The plaques were made to a standard and were provided by the National Committee of the Cult of Our Heroes, Our Greats, and House of Heroes. The plaques also have an educational purpose, not just a commemorative one (40,127/1922 VKM. rendelet). The embodiment of this grassroots remembrance was the decree advocated by the counties of Somogy and Nógrád. These counties held commemorations of heroes on the heroes' holidays, both at the municipal and city level twice a year. One ceremony was held on 15 March and the other on 2 November (Day of the Dead) at the municipalities' World War memorials. All student of the primary and secondary schools were obliged to attend these commemorations, accompanied by their teachers. This was an effort to strengthen and involve the local communities and to highlight the nation's heroic dead as worthy examples (181,278/1922 V. VKM. rendelet). Before the ceremony began, the students were given a special lesson to prepare them for the commemoration, where they talked to their teachers about the First World War and its heroes (1613 eln./1925 VKM. rendelet). It was important for the children to know about the heroes of their local communities. Not only the dead heroes but also the living war invalids were given a special place in education. Not only the dead heroes but also the surviving war invalids are honored. The ministry ordered that heroes who are still alive be included in education so that students could see examples of patriotism and loyalty. This respect can

then accompany students throughout their lives (500–18/1929 VKM. rendelet). The celebration of Heroes' Memorial Day had begun to fade due to the frequency of the decrees, so it was necessary to revive the commemoration and organize its framework (34.500/1932. V. VKM. rendelet).

The last type of “role model” had a connection with nature and environment. Back in 1906, Count Albert Apponyi issued a decree calling on students to protect the environment. The origins of the institution came from the United States of America. The first was Birds Day, and the second was Arbor Day, which was introduced in Hungary (26120/1906. eln. sz. VKM. rendelet). This tradition was revived by Kuno Klebelsberg when he decreed that these days should be observed. One day of the year was dedicated by schools to learning about birds and trees. The celebrations included educational programs for students on the usefulness and protection of birds. During the programs, children made bird feeders and planted saplings on Arbor Day, contributing to the beautification of the environment and the protection of nature. In addition, different publications were offered to the students on the day to deepen their love for nature and animals (300–76/1931 VKM. rendelet). A year later, the decree was amended to include a commemoration of national heroes. On these days, students tidied up the graves of the heroes and planted plants on war memorials. At the same time, they cared for the memory of the heroes, which was of foremost importance for the education of the nation (59.963/1932. VIII. d. VKM. rendelet).

## Summary

The defeat in the First World War (1918), the revolutions of 1918–1919 and the Treaty of Trianon (1920) posed significant challenges to the Hungarian political leadership and society. In addition to the human losses (tragedies), the disintegration of the country's territorial integrity also had an impact. The challenges also had an impact on education, where the ministers of culture of the period played a major role. The work of Kuno Klebelsberg and Bálint Hóman was based on the creation of Hungarian “cultural supremacy” and the concomitant increase in the level of education. Klebelsberg, as a politician working in the 1920s, wanted to put the whole system on an old-new footing, to provide European education. Hóman, who became head of the ministry in the 1930s, placed great emphasis on national education. Both ministers wanted to seize every important opportunity to promote this noble aim. One of the most important means of doing so was to provide national role models for young people. The government was able to influence education mainly through the decrees issued to communicate their aims. These legal sources were published selectively in the official journal called „Hivatalos Közlöny”. (“Hungarian Gazette”)

The choice of role models was a key issue for the ministry. People who have made a lasting contribution to Hungarian history, the history of science or art were chosen. In selecting the various role models, the aim was to disseminate them nationwide so that children would have a choice of role models to choose from throughout their lives. The difficulty in grouping them was that the vast majority of these were historical figures, but they had made a difference in different fields. The first category included historical figures

(rulers, princes) who played a role in the country's historical events. The second category is made up of cultural figures (writers, poets, and scholars). In addition, they tried to set an example for the students in terms of themes such as the Day of Birds and Trees or Heroes' Day.

The education ministers of the period had a strong influence on the practice of role modelling, but both sought to educate future generations along universal – Hungarian and foreign – examples. The tangible results of their work (the decrees) provide a new analytical perspective on the history of Hungarian education between the two world wars, as well as on the history of the legal regulation of the period.

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4341-1936 VKM. rendelet. A m. kir. vallás- és közoktatásügyi miniszter 4341-1936. eln. sz. rendelete Báthory István volt erdélyi fejedelem, később Lengyelország királya emlékének megőrzésének tárgyának. Hivatalos Közlöny, 1936.10.28.

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*Zsuzsa Koltai*

*THE ROLE OF MUSEUM LEARNING IN PROMOTING  
SUSTAINABILITY - COMPARATIVE RESEARCH IN BARANYA COUNTY  
AND LANDKREIS GÖRLITZ*

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**Abstract**

The study explores aspects related to the role of museums in promoting sustainability among the results of a comprehensive research entitled „The role of museum learning in strengthening resilience in peripheral regions – Comparative research in Görlitz District and Baranya County” conducted with the support of the Saxon State Ministry of Science, Culture and Tourism's Saxon Visiting Professors Program 2022.

Among the many aspects of the role of museums in promoting resilience, the empirical research also dealt with how much and in what way the museums/heritage sites in the two investigated areas contribute to the promotion of sustainability through their exhibitions, programs and other initiatives. Within the framework of the comparative research, based on a stratified sampling procedure, structured interviews were conducted with museum educators, museum directors, and relevant senior colleagues of 13 Baranya County and 13 Görlitz District museums/heritage sites between October 2022 and January 2023. The study compares the activities of the museums included in the research from the two regions in terms of the extent to which they promote the realization of the following seven of the 17 Sustainable Development Goals of the UN's Agenda 2030: health and well-being, quality education, gender equality, reducing inequalities, responsible consumption and production, action against climate change, sustainable cities and communities.

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*Keywords: sustainability; museum learning; comparative research*

**Introduction**

One of the most important international trends related to museum learning in recent decades is the significant expansion of the social roles of museums. ICOM's latest museum definition, adopted in August 2022, defines a number of social tasks that were not included in its previous museum definitions, such as the realization of inclusivity, the support of diversity and sustainability, or the active involvement of communities into the operation of the museums (ICOM, n.d.-b).

In the past decade, the role of museums in promoting sustainability has become an increasingly important issue in the professional dialogue about the social role of museums at international, national and institutional levels alike.

The Agenda 2030, published by the United Nations in 2015, defined the following 17 Sustainable Development Goals as the determining direction of activities until 2030: 1. No poverty; 2. Zero hunger; 3. Good health and well-being; 4. Quality education; 5. Gender equality; 6. Clean water and sanitation; 7. Affordable and clean energy; 8. Decent work

and economic growth; 9. Industry, innovation and infrastructure; 10. Reduced inequalities; 11. Sustainable cities and communities; 12. Responsible consumption and production; 13. Climate action; 14. Life below water; 15. Life on land; 16. Peace, justice and strong institutions; 17. Partnerships for the goals (United Nations, n.d.).

In the last decade, many important works have been published on the relationship between museums and sustainability, including the role of the museum in promoting sustainability, as well as the conditions of the institutions' sustainable operation (eg: Madan, 2011; Brophy & Wylie, 2013; Sutton, 2015; Barthel-Bouchier, 2016; McGhie, 2019; Garthe, 2022, etc.)

Museum professional organizations also focus on the role of museums in promoting sustainability to a great extent.

The largest international organization of museums, the International Council of Museums (ICOM), defined "Museums, Sustainability and Wellbeing" as the theme of the 2023 International Museum Day and stated in connection with this that "*there are many ways in which museums can contribute to achieve the Sustainable Development Goals: from supporting climate action and fostering inclusivity, to tackling social isolation and improving mental health.*" (ICOM, n.d.-a)

The conference entitled "and... ACTION! Museums in the climate crisis" to be held by the Network of European Museum Organizations (NEMO) in Lahti, Finland, in November 2023, will focus specifically on the climate crisis within sustainability (NEMO, n.d.).

The "We are Museums" initiative which has been operating since 2013 and currently has a membership of around 2,000 museum professionals, developed an online platform in March 2020 to promote international professional dialogue in order to strengthen the active role of museums in sustainability. In addition to the online sharing of various resources and the dissemination of museum professional news, the initiative created an active professional community committed to sustainability (We are Museums, n.d.).

Numerous domestic and international researches and projects have been started around the world related to the role of museums in promoting sustainability, of which only a few German and Hungarian initiatives are highlighted here due to the comparative nature of this study.

The currently ongoing project "Green Museum and Climate-Friendly Culture. Environmental Management of Climate-Related Risks in Museums" implemented in cooperation between the German Federal Environmental Foundation – DBU, the Protestant Institute for Interdisciplinary Research – FEST and the Rathgen Research Laboratory of the National Museums in Berlin - Prussian Cultural Heritage Foundation – SPK aims to reveal German and international examples of museums' environmentally friendly operations in order to prepare museums for climate change (Questionnaire for Museums, n.d.). The following 6 aspects are in the focus of the research: control systems; resource use; control of heating, cooling, ventilation; mobility; careful material and waste management; building management and sustainable construction criteria (Deutsche Bundesstiftung Umwelt, n.d.).



In the summer of 2022, 11 museums in Hamburg launched a project defining carbon-neutral museum operation as a goal in order to ensure continuous and long-term sustainability efforts. The initiative plays a pioneering role in the cultural sector by the fact that, in their research report published in February 2023, the additional burden arising from visitor mobility – which is obviously only based on estimates – was included in the calculation of the carbon footprint of the institutions (Stiftung Historische Museen Hamburg, n.d.).

The role of museums in promoting sustainability has also become an important professional issue in Hungary for specialists dealing with museum pedagogy and museum andragogy, as well as for museologists, and more and more often from the point of view of museum strategy-making as well. In recent years the Pulszky Society – Hungarian Museum Association's Museum Andragogy Section has been particularly active in the topic of sustainability. In the fall of 2020, based on the results of the sustainability section of the online workshop series entitled "II. National Museum Andragogy Workshop Days", a proposal was submitted to the presidency of the Pulszky Society (Kriston Vizi et al.) and then between October 2021 and March 2022 a series of workshops with the title of "Museums for sustainability - Sustainability in museums" was organized for Hungarian museum professionals (Mayer, 2022). In addition, The Pulszky Society - Hungarian Museum Association's commitment to sustainability is clearly demonstrated by having McGhie's work entitled "Museums and the Sustainable Development Goals: a how-to guide for museums, galleries, the cultural sector and their partners" translated into Hungarian in 2022 and made it available for free on the association's website (<https://pulszky.hu>) among the downloadable documents.

Regarding the fact that the topic is extremely important and current in Hungary as well, it would also be sufficient to point out that the international conference "Museum Reflection: Society and Environment" organized by the Pulszky Society in May 2023 highlighted many aspects of sustainability (Tóth, 2023). Defining the criteria system of the Green Museum was an important objective of the conference. Regarding the topic, two Hungarian experts on the role of museums in promoting sustainability, Tamás Vásárhelyi and Adél Mayer sent a discussion paper to the participants in advance (Vásárhelyi, 2023), which was discussed at the conference in the plenary session and a resolution was drawn up on further steps related to the issue. Several papers in the special issue of the journal *Tudásmenedzsment* dedicated to the conference and published in September 2023, deal with the issue of sustainability (Koltai & Kovács, 2023). One of the studies in the volume presents a concrete institutional practical solution for the development of sustainable museum operation through the description of the sustainability efforts of the Museum of Fine Arts in Budapest (Galambos & Borbély-Roberts, 2023).

This study examines the role of museums in promoting sustainability in a comparative way, based on empirical research conducted in relation to the activities of museums and heritage sites in Baranya County, Hungary, and Görlitz District, Saxony, Germany.

## Framework of the survey and research methods

The author conducted her empirical research entitled „The role of museum learning in strengthening resilience in peripheral regions – Comparative research in Görlitz District and Baranya County” with the support of the Saxon State Ministry of Science, Culture and Tourism’s Saxon Visiting Professors Program 2022. The aim of the research was to reveal the extent to which the museums in the two examined areas respond to social, economic and cultural changes and challenges, as well as what role they play in strengthening the resilience through their museum learning initiatives and community activities. The research revealed the local characteristics of museum pedagogy and museum andragogy and mapped the similarities and differences in museum community organization and engagement, communication and networking, as well as examined comparatively the efforts made by museums to promote sustainability and strengthen the resilience of local residents in the two investigated areas.

Within the framework of the research based on a stratified sampling procedure, structured interviews were conducted between October 2022 and January 2023 with museum educators/museum directors/relevant senior colleagues of 13 museums /heritage sites in both Baranya County and Görlitz District.

Since there are several heritage sites and so-called country houses in Baranya County that offer high-quality museum/heritage education activities and services, which are not classified as museums or so-called museum collections/exhibition sites of public interest according to the Hungarian legal regulations and the Hungarian professional classification of museums (1997. évi CXL. törvény; 376/2017. (XII. 11.) Korm. rendelet), thus, regarding Baranya County, the research population included all institutions and organizations that, based on their collections or exhibitions, carry out heritage education/museum education activities, or offer other programs serving knowledge transfer or community building. Since Pécs, the seat of Baranya County, has two significant institutions that include several exhibition sites and carry out extensive museum education work at various locations under the institutions' supervision, three colleagues from the Janus Pannonius Museum and two colleagues from the Zsolnay Heritage Management Ltd. (Zsolnay Örökségkezelő Nkft.) were included as interviewees in the research. (See the research sample in Appendix No. 1.)

All interviews related to the activities of the examined Baranya County institutions were conducted on MS TEAMS (with one exception, where a telephone interview was carried out due to the lack of technical conditions of the interviewee) between October and December 2022. Interviews regarding Görlitz District museums were conducted partly in person, partly by telephone and partly online between November 2022 and January 2023.

The interview questions prepared in English were translated into Hungarian and German. The interviews were conducted with Hungarian interviewees in Hungarian, and with German interviewees in English or German.

One block of questions of the comprehensive structured interviews was aimed to reveal the extent to which the institutions in the sample strive to achieve the sustainability goals formulated by the UN in 2015. Out of the 17 Sustainable Development Goals defined by Agenda 2030 (United Nations, n.d.), the set of questions in the structured interviews of

the empirical research asked about the institutional efforts related to the following six sustainability goals: 1. Health and well-being; 2. Quality education; 3. Gender equality; 4. Reducing inequalities; 5. Responsible consumption and production; 6. Action against climate change. Linked to the Sustainable Development Goal No. 11 (Sustainable cities and communities) of the Agenda 2030, the questionnaire dealt with the involvement of the local community in a separate block of questions.

Among the comprehensive research results, this study examines the museum learning programs and initiatives as well as the forms of community involvement in the sampled museums in terms of their connection to the above-mentioned goals of Agenda 2030.

## **Implementation of Sustainable Development Goals in Baranya County and Landkreis Görlitz museums**

### **From promoting well-being to climate action**

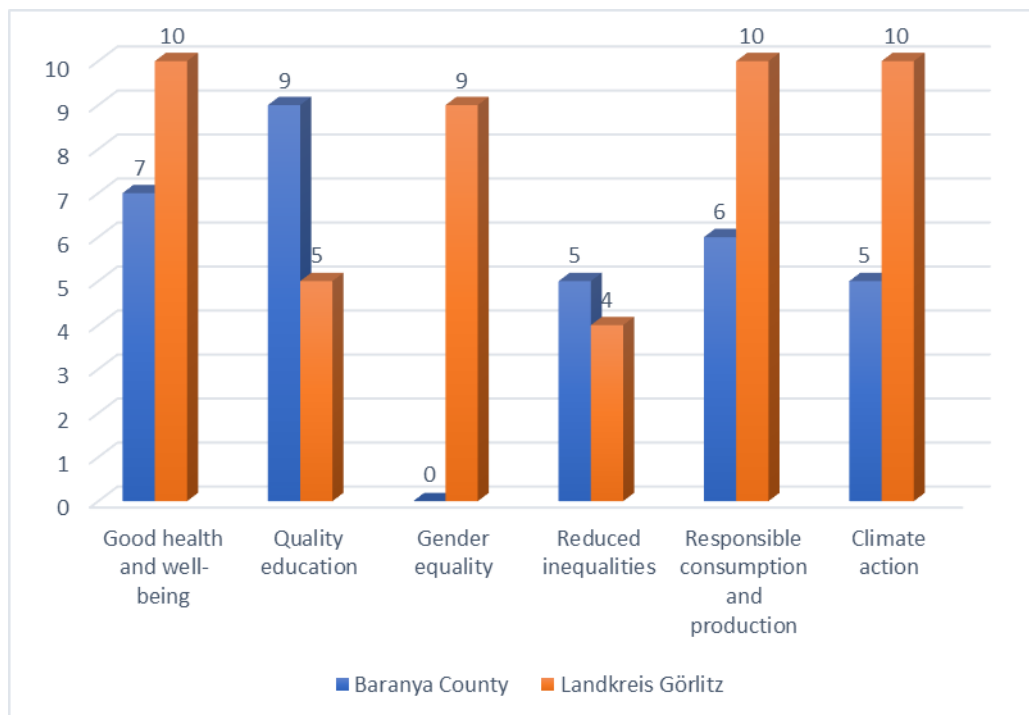
Based on the results, it can be concluded that in Baranya County the support of quality education is of particular importance in the operation of the examined institutions. However in Landkreis Görlitz beside promoting well-being as well as responsible consumption and production, striving for gender equality and raising awareness and education regarding climate change are important aspirations in the activities of museums.

While in Baranya County, responsible consumption and production as well as action against climate change are rather not taken into account when developing institutional programs or during institutional operation, these are expressed aspirations in three quarters of the museums in Landkreis Görlitz included in the research.

The biggest difference between the examined German and Hungarian museums can be seen in the area of efforts to achieve gender equality. While in three-quarters of the Landkreis Görlitz museums included in the sample, this is expressed as an endeavor in the operation and/or programs/ exhibitions, none of the sampled institutions in Baranya County had this aspiration. (see Figure 1)

We obviously cannot draw the conclusion from these research data that gender equality has already been perfectly realized in Hungary, so there would be no need to strive to achieve it. Rather, it shows that this aspiration does not even arise in terms of museum programs and knowledge transfer. (The CXL Act of 1997 (1997. évi CXL. törvény), which regulates professional work in museums, states that the intellectual possession of cultural heritage assets is a fundamental right of all people, and that making them widely and equally accessible to the public is the society's obligation.)

Figure 1: Promoting certain sustainability goals in the investigated institutions, Baranya County and Landkreis Görlitz (N=26)



Source: own source

Participation in cultural experiences and community programs is a fundamental feature of generating well-being. At the same time, some institutions specifically strive to promote well-being for example with community dance programs and creative activities (eg: Zsolnay Heritage Management Ltd.), or with performances aimed at promoting psychological well-being (Country House in Hosszúhetény/ Hosszúhetényi Tájház; Janus Pannonius Museum) in Baranya County. As a unique initiative, Szigetvár Castle provides a venue for animal therapy sessions in the green areas of the castle. In Görlitz District, for example the so-called City Game organized by the City Museum in Löbau strengthens the local community through participation and community interaction, and fosters the participants' sense of belonging to the local community, thereby promotes well-being.

The pursuit of quality education appears to a significantly greater extent in the Baranya County institutions of the sample than in the case of the Görlitz District museums. A particularly good initiative in Baranya County is the so-called "Unusual History" program of the World Heritage Division of Zsolnay Heritage Management Ltd. (Zsolnay Örökségkezelő Nonprofit Kft.), which is offered free of charge specifically for the 5th and 9th grade classes of Pécs schools, with the aim of enabling all Pécs schoolchildren to get to know the city's Roman heritage.

In Baranya County, the following initiatives promoting responsible consumption and production, as well as action against climate change have been identified in the examined institutions: sharing knowledge about climate change; selling locally made souvenirs;

conscious use of waste materials in museum education programs; joining programs organized on the occasion of Earth Day; introducing the waste-free nature of traditional rural farming.

In Landkreis Görlitz the following forms were revealed: discussions with locals; supporting research programs; executing projects; recycling; reuse of materials; sustainable operation of the museum in terms of energy, materials and travel; incorporating the theme into guided tours; offering museum education programs dedicated to the topic.

The Senckenberg Museum für Naturkunde Görlitz is particularly active and innovative in the realization of responsible production and consumption, as well as climate action objectives with its "Nature Scouts" program for children, scientific English language lectures, scientific and educational publications. In addition, operating the museum in a sustainable manner is also a fundamental objective here, starting from the use of recyclable materials, through colleagues traveling by train instead of flights, to the organization of Zoom conferences to reduce the carbon footprint related to transportation, many exemplary practices can be highlighted from the museum's operation.

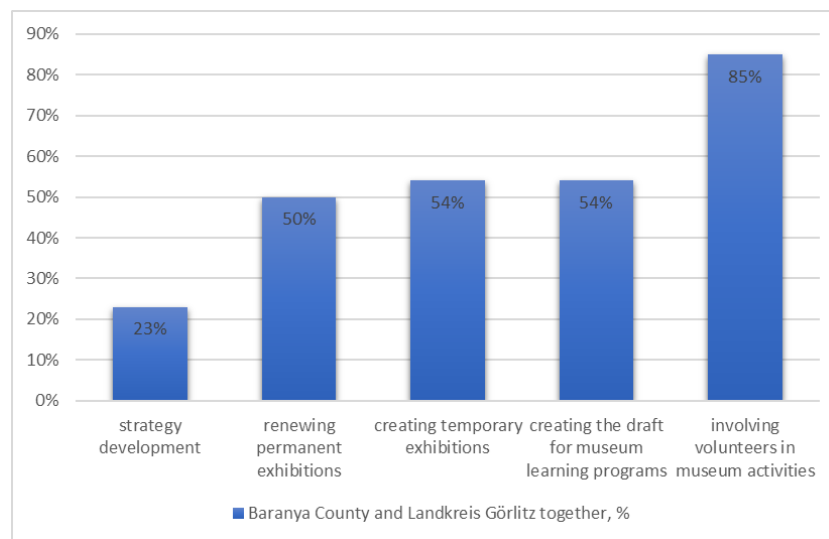
Museum education programs organized around environmental awareness can also have a multiplier effect, if the children pass on the knowledge acquired in the museum program to their parents or friends, as well as if they convey an environmentally conscious attitude to their environment.

### **Ways of involving and supporting local communities**

The research also aimed to explore the extent and nature of the active involvement of the local community in museum work, as well as the forms of supporting and strengthening local communities, based on both the goal of Agenda 2030 for sustainable communities and ICOM's new museum definition. Accordingly, it was revealed through the structured interviews how and to what extent the active involvement of the community appears at the examined institutions in the following areas: 1. developing museum strategy; 2. modernizing permanent exhibitions; 3. creating temporary exhibitions; 4. developing the draft of the programs offered by the museum; 5. involving volunteers in museum activities.

Based on the summation of the research results, the active involvement of the local community is mainly achieved through volunteering in the two investigated areas. 85% of the sampled institutions are supported by volunteers with various intensities and ways. While half of the examined museums involve the local communities at some level in the creation of permanent and/or temporary exhibitions as well as in the development of the draft of the museum programs, in three quarters of the institutions the local communities have no influence on the development of the museum strategy. (See figure 2)

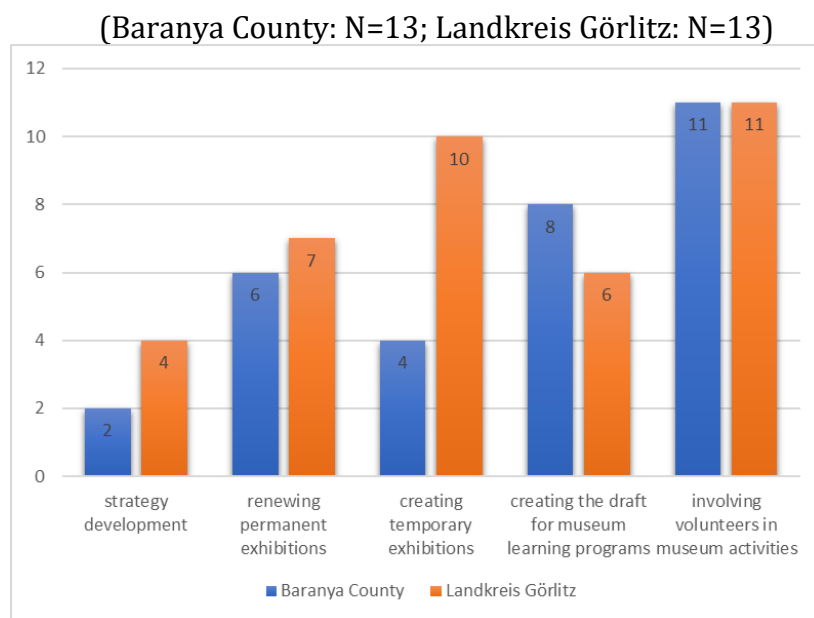
Figure 2: Involvement of the local community in the museum work, % (N=26)



Source: own source

Out of the 13 sampled museums in Baranya County, only two city museums involve the local community in their strategy development. In Landkreis Görlitz, twice as many museums involve locals in their strategy-making compared to Baranya County. (See figure 3).

Figure 3: Differences in the involvement of the local community in various aspects of museum work in Baranya County and Görlitz District (N=26)



Source: own source

Two different ways of involving local communities in museum strategy-making were revealed, which appear both in Baranya County and Görlitz District. These are:

1. asking the opinions of local communities directly
2. consultation with the museum association that supports the museum

The Zrínyi Castle in Szigetvár involves the members of the Castle Friends Circle in the development of the strategy. Out of a membership of about 300 people in the Castle Friends Circle, 20-30 people are active, and the institution regularly consults with them. The Kulturhistorisches Museum Franziskanerkloster & Die Zittauer Fastentücher in Zittau has a close relationship with its museum association, which has more than 100 members. The museum takes the feedback given by the members of the museum association into account both during the development of the museum strategy, the creation of permanent and temporary exhibitions as well as in developing the museum learning programs.

While in Sellye, the museum asks for the opinion of the local community regarding strategy-making in the form of informal conversations, the Völkerkundemuseum Herrnhut organizes the so-called "Teahouse Conversation" program which involves the local and wider community in planning and conceptualization (museum strategy, modernizing permanent exhibitions, creating temporary exhibitions). The strategy of the Glasmuseum Weißwasser was developed around 5 years ago in partnership with the city community.

In addition, in Görlitz District a third way of involving the community in museum strategy-making was revealed: The Deutsches Damast- und Frottiermuseum in Großschönau involves people who worked in textile industry in the strategy-making process.

It was also found that the involvement of local communities in museum strategy-making can, in some cases, generate conflict in a given settlement, as it happened in one of the sampled German museums. Although a local organization was previously involved in the development of the certain museum's strategy-making, this initiative was discontinued a few years ago, as it had generated controversy within the city.

While the Baranya County and Görlitz District museums included in the sample involve the local community in the process of renewing the permanent exhibition in almost the same proportion, a significant difference can be observed in relation to the creation of temporary exhibitions. 31% of Baranya County museums and 77% of Görlitz District museums involve the local community in the creation of temporary exhibitions.

The research revealed the following forms of involvement of the local community in the creation of exhibitions:

Permanent exhibition:

- The permanent exhibition was put together by the local community.
- The opinions of locals are sought regarding the modernization of the permanent exhibitions.
- Locals send e-mails or call the museum to share their ideas regarding the possibility of modernizing the permanent exhibition.

Temporary exhibition:

- Locals can exhibit their own works.
- Collaborating with local associations and /or foundations.
- The museum involves its own museum association in the process.
- Collaborating with local school and/ or kindergarden teachers.
- Creating co-designed exhibitions with the involvement of artists and other individuals.

The initiatives of the Country House in Hosszúhetény and the Zsolnay Heritage Management Ltd. regarding the creation of temporary exhibitions with community involvement can be highlighted as innovative practices from Baranya County. During the creation of temporary exhibitions the head of the country house in Hosszúhetény works closely with the local kindergarten teachers and the association founded to preserve local traditions. In the Zsolnay Cultural Quarter there was a photo contest to make Easter painted and decorated eggs during the COVID-19 lockdown. Everyone could submit a photo of the egg they designed. This is how the institution tried to keep in touch with the public during the pandemic.

In Görlitz District, the Kulturhistorisches Museum Görlitz and the Konrad-Wachsmann-Haus in Niesky are particularly innovative in this regard. The Kulturhistorisches Museum Görlitz always creates participatory temporary exhibitions where they deliberately invite people from Görlitz to actively contribute to the exhibition themes and the exhibited objects. Involvement of locals in the creation of temporary exhibition has a long tradition at the Konrad-Wachsmann-Haus in Niesky. They cooperate with locals interested in history, who support the museum's work with collecting objects. In the past, temporary exhibitions were always created together with this circle. The museum often has exhibition projects that call the local population in advance to participate, for example by lending objects.

The sampled Baranya County and Görlitz District museums involve the local communities in the development of museum learning programs in various ways. Consideration of visitors' feedback are implemented in both of the examined areas (eg.: Selye City Community Center, Library and Museum; Kulturhistorisches Museum Görlitz).

At the same time, differences can be discovered between the Baranya County and Görlitz District museums in the sample regarding the ways local communities are involved in the development of museum learning programs.

The following forms were mentioned only by interviewees from Baranya County:

- Consultation with local civic organizations to ensure that there are no overlaps in the schedule or nature of the programs (eg: Zrínyi Castle in Szigetvár)
- Consultation with local teachers about the needs of the local schools (eg: Janus Pannonius Museum, Pécs)
- Involvement of professional organizations in the development of the programs (eg: Janus Pannonius Museum, Pécs)
- Involvement of local specialists and researchers (Country House in Hosszúhetény)
- Involvement of local NGOs in the development of the programs (eg: Janus Pannonius Museum, Pécs)

A peculiarity of some Baranya County museums is that the museum education programs are conducted by a certain group of the local community, thus the content of the museum learning program is completely determined by them. The museum education programs held at the German Country House in Majs (Majsi Német Tájház) are conducted



by local teachers. Since all learning programs in the Country House in Geresdlak are carried out by local volunteers, the determination of content, methods and schedule entirely depends on them.

In Görlitz District, two ways of involving the local community in museum learning programs were revealed, which did not appear in the examined Baranya County institutions.

- The Senckenberg Museum für Naturkunde Görlitz prepares tailor-made museum education programs for schools based on their requests and needs.
- The Völkerkundemuseum Herrnhut involves locals in developing the museum's programs in the form of the so-called Future Workshop, where interested young people can work on the museum concept and contribute with their own ideas and suggestions.

The role of volunteers in the operation and program organization of the country houses in Baranya County villages is particularly important. The volunteers help with maintenance in Majs and Geresdlak, cleaning in Kásád, and they contribute to the creation of exhibitions in Hosszúhetény. In Mecseknádasd, volunteers give guided tours in the collection. In Geresdlak extensive museum education activities are carried out through the voluntary work of local retired teachers. In Hosszúhetény volunteers help with the implementation of the programs organized by the country house in connection with Harvest Day.

In Baranya County villages, members of NGOs founded independently of the country houses take role as volunteers in the operation of the country houses. For example, in Majs the German Cultural Association of Majs takes care of the maintenance of the country house. In the German Country House of Mecseknádasd, members of the local pensioners' association hold voluntary guided tours. Volunteering related to the Harvest Day organized by the Hosszúhetény Country House is also realized through the activities of a local NGO. Volunteer work related to country houses is mostly done by local seniors.

The museum activities carried out by high school students in the framework of the compulsory school community service can be found in village country houses, city museums and in the institutions of the county seat Pécs. (e.g. country house in Hosszúhetény, Kanizsai Dorottya Museum in Mohács, Zrínyi Castle in Szigetvár, Janus Pannonius Museum and Zsolnay Heritage Management Ltd. in Pécs). At the same time, the possibility of integrating the so-called 50-hours mandatory school service of high school students into the professional work of museums more successfully than at present is a question that arises in several museums.

In the Kanizsai Dorottya Museum in Mohács university students help with museum work as volunteers, in the case of the Zrínyi Castle in Szigetvár locals are willing to support the professional work especially in the area of tradition preservation, but here the museum management must select in order to ensure that the requirement of authenticity prevails in all respects.

In the case of the sampled Baranya County institutions, with one exception, the activities of the volunteers are not formalized or official. Only the World Heritage Division of Zsolnay Heritage Management Ltd. has an elaborate volunteer program, which includes

the training of volunteers after recruitment. Applicants can choose from four types of voluntary work (museum education assistant, visitor information assistant, photographer, guide), they have a contractual relationship with the institution and receive a certificate of their participation in the volunteer program.

The Görlitz District museum associations play an extremely important role in volunteer activities in many museums. (eg: Völkerkundemuseum Herrnhut; Kulturhistorisches Museum Görlitz).

A significant difference between the museums of the two examined areas is that, while in Görlitz District the museum associations have a particularly important role not only in volunteer work supporting the museum, but also in funding the museum and expanding the collection, this is not typical for the museums in Baranya County. In the Heimatmuseum der Stadt Herrnhut, for example, the museum association enriches the collection by voluntarily collecting objects and donating them to the museum, as well as by purchasing objects. The interviewee representing the Heimatmuseum der Stadt Herrnhut emphasized that the role of the local museum association in expanding the collection is particularly important for the institution, since as a municipal museum they do not have adequate financial resources for this. In addition to the purchase of specific objects, the museum association also plays an important role in collecting donations, from which the museum can enrich the collection with new objects.

The research revealed the following additional forms of voluntary work in Görlitz District: assistance in organizing family events in the museum; involvement in research activities; taking photos for the museum; distributing flyers.

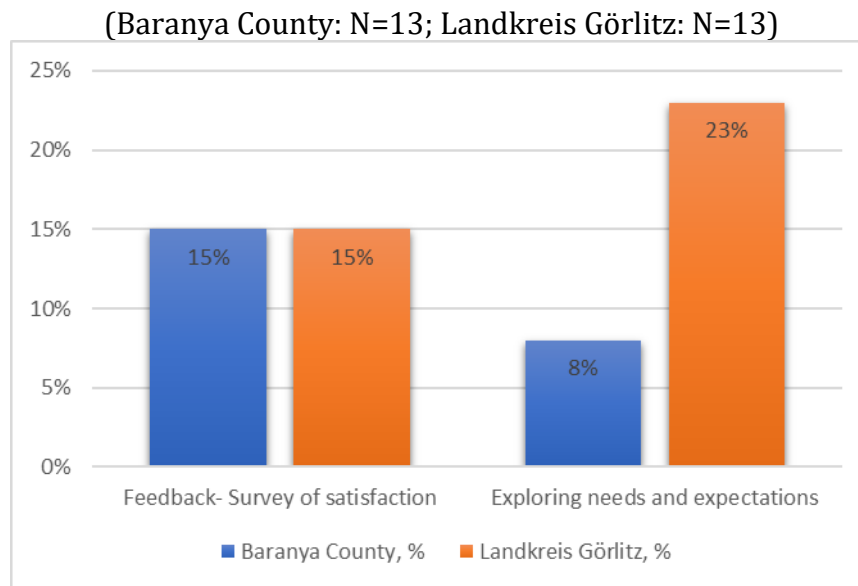
There is an example where volunteering is a condition of museum operation. Volunteers play an extremely important role at the Konrad-Wachsmann-Haus Niesky, since the museum could not be open without the help of volunteers, especially on weekends.

### **Visitor research and reflection on the needs of the community**

In most of the sampled museums/heritage sites in Baranya County, only the visitor counting required by state regulations are applied, and professional visitor research is carried out only in two institutions of the sample. At the World Heritage Sites of Zsolnay Heritage Management Ltd. colleagues use questionnaires in Hungarian and English placed in the forecourt of the exhibition to find out about visitors' satisfaction with the exhibition. The results of the questionnaires are compiled and jointly evaluated by the museum educators in order to monitor changes every year. At the Sellye City Community Center, Library and Museum a questionnaire survey is conducted twice a year in order to assess the satisfaction of the audience with certain programs.

Professional research regarding the feedback of visitors is not typical in Görlitz District either, here too only two institutions from the sample have a specific survey to assess visitor satisfaction. In the Senckenberg Museum für Naturkunde Görlitz several forms of visitor research are carried out. In addition to the less frequently used questionnaire research, the public's reaction regarding new exhibits is investigated by using the method of observation.

Figure 4: The extent of conducting visitor research in the examined museums, %  
(N=26)



Source: own source

In all other museums of the sample, museum professionals learn about the satisfaction of the visitors in relation to the exhibitions, operation, services and programs in an informal way by having personal conversations with locals or monitoring comments on the news feed of the Facebook profiles of the institutions. In other cases colleagues have information about the satisfaction of visitors exclusively from the entries of the museum guest books.

While a professional assessment of visitor expectations and needs takes place in only one of the Baranya County museums of the sample, it appears in 3 of the Görlitz District institutions. At the Völkerkundemuseum Herrnhut, visitors' needs are assessed once a year in the form of a questionnaire. Dorfmuseum Markersdorf places great emphasis on exploring the needs of the local community, especially through consultations with stakeholders and the supporting association held several times a year. The Löbau City Museum offers visitors the opportunity to share their suggestions regarding the topics of future exhibitions with sheets of paper displayed in the permanent exhibition. Entries are reviewed regularly by museum colleagues.

## Summary

The study examined the role of the Baranya County and Görlitz District museums in promoting Sustainable Development Goals in a comparative way. The investigation revealed that while the Baranya County museums in the sample focus primarily on ensuring quality education in their museum learning programs, the Görlitz District museums rather focus on promoting well-being, gender equality, responsible production and consumption, and climate awareness. The research revealed a particularly significant difference between the two areas in terms of museum efforts aimed at promoting gender equality. While the promotion of gender equality is one of the most defining sustainability

objectives in the case of the programs, initiatives and operation of the Görlitz District museums in the sample, none of the Baranya County interviewees defined this as a goal to be achieved.

In terms of promoting the well-being of the local community and involving them in museum programs and professional work, many similarities can be discovered between the sampled museums of the two areas. Such a similarity is that, in the vast majority of cases, volunteers support the operation of museums. In the case of the Görlitz District museums, the institution's own association is pivotal in terms of both voluntary work and financial support. Visitor research in both areas is mostly carried out casually, informally, without a measuring tool. At the same time, some innovative practices related to the assessment of visitor needs were revealed in Görlitz District.

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## Appendices

### **Appendix#1: Sample, „The Role of Museum Learning in Strengthening the Resilience in Peripheral Regions — Comparative Research in Görlitz and Baranya Counties”, Saxon Visiting Professors Program of the Saxon State Ministry of Science, Culture and Tourism, 2022**

#### **Baranya County:**

1. Hosszúhetényi Tájház, Hosszúhetény (Interviewee1)
2. Janus Pannonius Múzeum, Pécs (Interviewee2;3;4)
3. József Attila Városi Könyvtár és Muzeális Gyűjtemény, Komló (Interviewee5)
4. Kanizsai Dorottya Múzeum, Mohács (Interviewee6)
5. Kásádi Sokac Tájház, Kásád (Interviewee7)
6. Majsi Német Tájház, Majs (Interviewee8)
7. Mecseknádasdi Német Nemzetiségi Tájház, Mecseknádasd (Interviewee9)
8. Német Nemzetiségi Tájház, Geresdlak (Interviewee10)
9. Pécsi Egyházmegye, Pécs (Interviewee11)
10. Sellye Városi Művelődési Ház, Könyvtár és Muzeális Intézmény, Sellye (Interviewee12)
11. Szigetvári Zrínyi Vár, Szigetvár (Interviewee13)
12. Városi Könyvtár és Helytörténeti Kiállítás Bóly, Bóly (Interviewee14)
13. Zsolnay Örökségkezelő Nonprofit Kft., Pécs (Interviewee15;16)

#### **Landkreis Görlitz:**

1. Deutsches Damast- und Frottiermuseum, Großschönau (Interviewee17)
2. Dorfmuseum Markersdorf, Markersdorf (Interviewee18)
3. Glasmuseum Weißwasser, Weißwasser (Interviewee19)
4. Heimatmuseum der Stadt Herrnhut, Herrnhut (Interviewee20)
5. Konrad-Wachsmann-Haus Niesky, Niesky (Interviewee21)
6. Kulturhistorisches Museum Franziskanerkloster & Die Zittauer Fastentücher, Zittau (Interviewee22)
7. Kulturhistorisches Museum Görlitz, Görlitz (Interviewee23)
8. Museum Dittelsdorf, Zittau OT Dittelsdorf (Interviewee24)
9. Nordböhmen Vereinshäusl mit Heimatstube, Großschönau (Interviewee25)
10. Schlesisches Museum zu Görlitz, Görlitz (Interviewee26)
11. Senckenberg Museum für Naturkunde Görlitz, Görlitz (Interviewee27;28)
12. Stadtmuseum Löbau, Löbau (Interviewee29)
13. Völkerkundemuseum Herrnhut, Herrnhut (Interviewee30)

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