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**THEMATIC CLUSTER**  
TEMATSKI BLOK





Petra Podobnikar

Introduction to the thematic cluster / Uvodnik v tematski blok

## ON THE "POWER" OF METAPHOR

In "On Truth and Lie in an Extra-Moral Sense", Nietzsche proposes that truth and concepts only exist metaphorically:

*What, then, is truth? A mobile army of metaphors, metonyms, and anthropomorphisms – in short, a sum of human relations, which have been enhanced, transposed, and embellished poetically and rhetorically, and which after long use seem firm, canonical, and obligatory to a people: truths are illusions about which one has forgotten are illusions ... metaphors that are worn out and without sensuous power; coins that have lost their pictures and now matter only as metal, no longer as coins (Nietzsche 1986).*

What is metaphor other than the failure of any objectivity, or of any possibility of truth, a pure fabrication – something that itself Nietzsche would as well acknowledge in a metaphor: the seeking of truth is only the metamorphosis of the world into a man, of the metaphor into a concept, man being the measure of all things. Importantly, what Nietzsche is pointing to is the power of metaphor: neither ornamental figure that merely accomplishes rhetorical and poetic function nor "excess" of meaning but rather strategy is what metaphor is in relation to truth, its power to create the world. Defining the role of metaphor on the classical linguistic assumption that there exists some kind of "objective law", implying that certainty, true meaning could be known or exists, somehow alludes to the existence of literal meaning. The broader notions and research on metaphor within social and political sciences challenge classical linguistics, where metaphor is a tool or a device producing nothing meaningful or significant, but rather a deviance, is what is ontologically immanent/natural to metaphor. Aristotle is considered one of the great "classics" from whom linguistics adopted the figurative notion of metaphor, even though Paul Ricoeur in *The Rule of Metaphor* (1981) argues that it was Aristotle who allows us to understand metaphor apart from its figurative notion – i.e. as the "sewing" in the word, sentence and discourse.

In *The Philosophy of Rhetoric*, I. A. Richards sets a significant milestone in metaphor theory. Richards' (1965) *tenor and vehicle* (the contextual theorem of meaning), where metaphor is the construction of both halves, introduces the metaphorical nature of mind and the contextual production of meaning. Subsequently, Max Black's (1954) influential work "Metaphor" initiates the debate that later became the starting point of the non-linguistic evidence of metaphor. Black's *interaction theory* challenged the deeply rooted assumption of the existence of literal/proper language. "Interaction metaphor" implies that replacing metaphorical with literal meaning inherently induces a loss of cognitive content of the meaning. George Lakoff and Mark Johnson in *Metaphors We Live By* (1980) give an extensive

analysis on the cognitive functioning of metaphor and empirical evidence of the conceptual nature of metaphor. In general, cognitive linguistics and cognitive neuroscience were the first disciplines that theoretically and empirically challenged the "hermetically" confined linguistic analysis of metaphor. In general, cognitive linguists assume that metaphor is a way of thinking and understanding reality. Apart from creating reality, metaphor is the mental processing of things and events, for reality is irreducibly metaphorical.

Over the last decades, many studies have embraced and challenged the "cognitive theory" of metaphor. Charles Forceville in his work *Pictorial Metaphor in Advertising* (1996) restored the concept of visual metaphor. David Ortony in the preface of *Metaphor and Thought* (1993) provided a constructivist account of metaphor – thus metaphor has a creative function in language and in perceiving reality. Raymond W. Gibbs in *The Poetics of Mind* (1994) and in the Preface to *Metaphor and Thought* (2008) argues that interdisciplinary research on metaphor allows advancing classical assumptions of metaphor as a part of language, mind (psychology) and culture (anthropology). Very few theoreticians were acknowledging metaphor as being omnipresent in other academic fields, whether they be arts, music or politics. *Metaphor and Political Language* (2008), edited by Terrell Carver and Jernej Pikalo, offers methodologically and theoretically innovative approaches to the use of metaphor in political science, demonstrating the importance of metaphor in social and political discourse.

The inquiry of the descriptive and constitutive functions of metaphors in social and political sciences is lucidly addressed in three articles provided by this special issue of *Družboslovne razprave*.

Ljiljana Šarić in *Metaphors in the National Discourse* focuses on the functioning of metaphor, conventional metaphor in particular, in contemporary South Slavic (media and public) national discourse and discourse of scholars on nationalism. Drawing on cognitive linguistic methodology, she demonstrates the symbolic and ideological effects of metaphor, indicating the difference between the conceptual metaphors (conventional) and *deliberate* metaphors in discourse. Šarić points to the strategic, intentional use of metaphor (as a discursive strategy), which has an immense impact on identity formation ("directing" and provoking certain emotions) and perceiving (political) events.

In *And the Word Was Made Flesh, and Dwelt Among Us: On Zombies, Political Protests and the Transmodality of Political Metaphors*, Ilija Tomanić-Trivundža investigates how political metaphors effect, or what role do political metaphors play in, (media) portraying of protest. Through the investigation of the *zombie metaphor*, he demonstrates the multimodal functioning of metaphor, i.e. the different uses/modalities in media/journalistic coverage of Slovenian popular uprising that took place between 2012–13. By combining distinctive methodological approaches, cognitive linguistics, social movement theory and visual culture, Tomanić-Trivundža introduces the concept of the *transmodal metaphor*. He argues that the process of refeudalization (Habermas) of the political and public sphere as a consequence of a democratic deficit, general apathy of the public and the increasing power of capitalism, which favours the commercial spectacle, somehow "imposes" the *carnavalesque performance*, i.e. zombified protestors, which may, but only temporary, induce political change. At the same time, he questions whether this symbolic



mortification is an effective mode in which to challenge contemporary forms of political constellations.

Natalija Majsova in *The Metaphor of the Dawn of the Space Age in Contemporary Social Sciences and Humanities* examines the metaphorical origins of astrosociology, nooc cosmology and cultural studies of outer space in order to discover whether the metaphor of the beginning of the space age might depart from/break with previous understandings of our "world"? Adopting the Aristotelian notion of metaphor, she argues that astrosociology and nooc cosmology uses the "space age" metaphor as an analogy merely repeating the contemporary life on Earth, whereas, in cultural studies, Majsova observes the performative implications of the space age metaphor. The artistic approaches, such as postgravity art, are the most eloquent in demonstrating the performativity of the metaphor of the space age.

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Natalija Majsova

## THE METAPHOR OF THE DAWN OF THE SPACE AGE IN THE CONTEMPORARY SOCIAL SCIENCES AND HUMANITIES

### ABSTRACT

*The dawn of the space age in the early 1960s first provoked unabashed awe. Then, it inspired numerous attempts to explain (away) the eventual status of the first examples of manned spaceflight accounts that mainly interpreted Yuri Gagarin's flight (1961) and the Moon landing (1969) as logical consequences of technological progress, a certain constellation of political circumstances, and a pinch of 'imagination' to begin with. Curiously enough, conclusions of the vast majority of such accounts cannot but resort to 'terrestrial' metaphors in order to explain why these endeavours were worth undertaking in the first place. In the 21st century, reflections on outer space seem to have settled within three conceptually designed research fields within the social sciences and humanities: astrosociology, noocosmology and cultural studies of outer space. The text analyses conceptualisations and accounts of the dawn of the space age exhibited by the core texts and methodologies of these research fields to demonstrate how they actually hinge on variant epistemologies, and interpret the role of metaphor in world-formation in radically differing ways.*

**KEYWORDS:** metaphor, space age, astrosociology, noocosmology, cultural studies of outer space

### **Metafora začetka vesoljske dobe v sodobnih družboslovju in humanistiki**

#### IZVLEČEK

*Začetek t. i. vesoljske dobe (space age) je trčil ob vsesplošno občudovanje. Temu so sledili poskusi, da bi prvim primerom poleta človeka v vesolje odvzeli status prelomnega dogodka: vzniknilo je več narativov, ki so polet prvega kozmonavta Jurija Gagarina leta 1961 in človekov pristanek na Luni leta 1969 interpretirali kot logični posledici tehnološkega napredka, določene konstelacije političnih okoliščin in ščepca »domišljije«, s katerim naj bi se vse skupaj pričelo. Tovrstni narativi navadno pojasnjujejo smiselnost človekovega preboja v vesolje s pomočjo izjemno »prizemljenih« metafor. Humanistika in družboslovje 21. stoletja poznata (najmanj) tri raziskovalna polja, ki se posvečajo vprašanjem človeka*

v vesoljski dobi: astrosociologijo, nookozmologijo in kulturne študije vesolja. V članku analiziramo konceptualizacije začetka vesoljske dobe, ki jih je mogoče izluščiti iz inavguracijskih tekstov in metodologij naštetih polij, ter poskušamo pokazati, kako ta polja z različnim razumevanjem metafore začetka vesoljske dobe in epistemološkega pomena metafore kot take proizvajajo bistveno razlikujoče se svetove.

**KLJUČNE BESEDE:** metafora, vesoljska doba, astrosociologija, nookozmologija, kulturni študiji vesolja

## 1 Introduction

It has often been observed that a lot about human outer space exploration is highly metaphorical. Astronauts and cosmonauts, for instance, have often been depicted as the prototype of a new hero (cf. Llinares 2011; McCurdy 2011), to measure up to the so-called space age (a signifier, which is in itself, as we shall proceed to argue, a highly suggestive metaphor). Particularly in the U.S. imaginary, outer space has often been depicted as the "ultimate frontier" (e.g. in McCurdy 2011), coincident with the horizon of new colonialism or, as argued convincingly by Shukaitis (2009), with the ever expanding horizon of capitalism, and thus a necessary "fix" for its structural crises. The post-Soviet Russian-speaking context, on the other hand, refers to outer space using the term *kosmos*, which alludes to the organizing, harmonizing principle of the universe as conceived of by the ancient Greeks (cf. Leiderman and Lipovetsky 1993). These examples by no means exhaust the list. Perhaps the last one that needs to be brought up at this point refers to the experience of those humans who had a chance to experience the world from the perspective of a spacecraft (or even merely a spacesuit). Frank White's work, *The Overview Effect* (White 1987/1998), discusses the accounts of a series of U.S. astronauts, which are so suggestive that the author does not even need to make any particular effort to demonstrate the persistence of a speculative, metaphysical element in them: the astronauts usually claim that the experience of leaving planet Earth behind is extraordinary, beyond description, and then resort to various terrestrial metaphors to try to make up for this lack of signifiers (e.g. "a dreamlike experience"; a "heart-stopper" (White 1998: 15)). White (1998: 15) concludes that "metaphor is not a mere extra trick of language ... it is the very constitutive ground of language", and that "we should expect one result of space exploration to be that language will grow as space exploration is described more frequently" (Ibid.).

Let's take this as the starting point of this article. The beginning of the space age, i.e. the launch of the Sputnik in 1957 and subsequent first cases of manned spaceflight in the 1960s may, in many respects, be thought of as a rupture with the set of coordinates that man had to deal with before. First and foremost, because the event of spaceflight cannot be "erased" or not taken into account in subsequent discussions about outer space or projections about its future. If many historical accounts of man's future prospects in outer space appear to be mirror images, suggestive analogies of prevalent terrestrial imaginaries, bound to a certain discursive and temporal context,<sup>1</sup> contemporary debates on questions

1. Blumenberg (2001), for instance, provides a very extensive –and somewhat metaphorical– account

about humanity and outer space cannot afford the luxury of dismissing “ethnographic” accounts, data from outer space.

In this sense, it seems sensible and logical that the beginning of the space age resulted in a certain expansion of research interests in the realm of the academia: since the second half of the 20<sup>th</sup> century, there have been several attempts of opening up new, somewhat conceptual research fields and creating adherent scientific disciplines, focusing on a broad range of questions about man and outer space (namely, astrosociology, noocosmology, and cultural studies of outer space). It does not seem unusual that these conceptual fields, devoted to questions about man and space, tend to remain tied to very specific cultural contexts. For example, astrosociology – a subdiscipline of sociology and a multidisciplinary field focusing on the development of society’s (and, in theory, societies’, although current practice focuses most on U. S. astronauts and the National Aeronautics and Space Administration’s (NASA) space program) addresses ways of engaging with outer space conceived in the U. S. imaginary, which is evident from its pool of references (both theoretical literature and empirical data). Noocosmology<sup>2</sup> – a “scientific discipline” [*nauka*] and “worldview” [*mirovozzrenie*] (Aseev 2010) that focuses on the steps needed for humanity to enter into a harmonious and happy existence as part of the macrocosm operates within a set of references which are predominantly Russian. Cultural studies of outer space – a transdisciplinary project that comprises cultural and social history of space exploration, analyses of related media representations, art and popular culture, and the theoretical implications of these analyses, emerged in the context of post-World War II Europe. It exhibits a lesser emphasis on empirical human space exploration than the other two disciplines, which in part reflects the history of Europe’s engagement with space exploration: post-WWII space programs in Europe traditionally focused more on communication and satellites than on manned spaceflight.

At first glance, it might seem that such an increase in academic interest and such a varied pool of new linguistic references has put White’s supposition on the imminence of an expansion of human language after the beginning of the space age into action. However, this conclusion would be slightly premature: expansion in terms of form does not say much about contents or structure. It is therefore the aim of this article to examine the metaphorical starting points of astrosociology, noocosmology, and cultural studies of outer space with reference to their inaugural texts, methodologies, and aims, in order to address the following question: Does the metaphor of the beginning of the space age as taken up by these research fields correspond to the supposition that the beginning of the space age may be conceptualized as a break with previous coordinates of our “world”? In order to address this question, we will first propose a conceptualization of how to think of the

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of the terrestrial conditions of the genesis of the Copernican world, which is possibly a constitutive precondition of the beginning of the space age in the 20<sup>th</sup> century.

2. The terms “astrosociology” and “noocosmology” are not completely interchangeable, and it would be premature to claim that noocosmology is merely a Russian neologism for astrosociology. As the text will proceed to demonstrate, the interests of the two fields differ in several very important respects; furthermore, at this moment, there is no evidence that the emergence of one discipline was of any inspiration for the conception of the other.

dawn of the space age in terms of its implications for the social sciences and humanities, and suggest what this issue might have to do with the question of metaphoricity. Then, we will use this conceptualization as a starting point of our analysis of astrosociology, noocosmology, and cultural studies of outer space respectively.

## 2 The Dawn of the Space Age as Rupture

White's claim about metaphor being a powerful means of making sense of the world, and his supposition that the space age and spaceflight will result in (or at least require) linguistic expansion, is suggestive, but requires elaboration. It might be tempting to interpret it quite literally, as a reference to metaphor as a powerful rhetorical device, and a call for new words, which might allow astronauts to describe their extraterrestrial experience with greater precision (with a greater degree of correspondence between their feelings and the words they use to recount them). However, there seems to be another, more intriguing interpretation possible. Rather than restricting metaphor to a rhetorical device, a "tool", it seems more accurate to consider it with its performativity in mind. As argued by Aristotle, metaphor is never simply a rhetorical device, but is also predicative, or, as demonstrated by numerous later theorists, performative:

*To learn easily is naturally pleasant to all people, and words signify something, so whatever words create knowledge in us are the pleasantest. . . . Metaphor most brings about learning; for when [Homer] calls old age 'stubble', he creates understanding and knowledge through the genus, since both old age and stubble are [species of the genus of] things that have lost their bloom. (Aristotle 2006: 1410b).*

Aristotle's focus appears to be on analogical metaphor, but the other potent argument that seems to be anticipated by the passage above is that metaphor exerts an influence on reality; co-structures it. In this vein, astronauts' accounts of their experience in outer space may be seen as shaped by the metaphors they had at hand, rather than merely as an aid they use to spice up their descriptions *post festum*. The same may be argued about the emergent research fields focusing on humanity and outer space: they are both shaped by existent metaphors, and are themselves metaphorical, as all paradigms, as elaborated by Cazeaux (2009: 134):

*/T/here is a fundamental two-way relationship between metaphor and epistemology. On the one hand, epistemology is metaphorical in the sense that the task of describing how our faculties mesh with the world requires us to make claims which exceed what is given in experience and which therefore can only be articulated by drawing on external areas of discourse. But, on the other, metaphor itself has been 'epistemologized' by recent research in philosophy and psychology, that is to say, metaphor has been shown to be central to the mapping and organizational procedures we employ in perception at large. What this two-way relationship means, I suggest, is that metaphor acquires an epistemological significance which (a) goes some way towards explaining why it is that the same metaphor can adapt itself to opposing theories of knowledge, and (b) can guide epistemological thought*

*through the science wars in a fashion which avoids the binarism of phenomenal appearance and noumenal reality.*

This loose conceptual framework should suffice for us to be able to address the key analytical issue, so we will not delve deeper into debates within metaphor theory in this text. However, it is necessary to address the question of the relationship between metaphor, the dawn of the space age, and academic discourse, as it arises within our loose conceptual framework.

What does our understanding of metaphor mean for any interpretations of the implications of (wo/)man's first ventures in outer space? On a most general level, the "space age" is a relatively common term used to refer to times after the launch of the Sputnik in 1957. After the end of the Cold war (and the space race), the phrase has been overshadowed by many other poignant syntagms describing "the human condition" (from "globalization" to "pax Americana" to "capital-parliamentarism" to the "anthropocene"). However, it inspired the emergence of several research fields within the social sciences and humanities, which nonetheless focus on the new possibilities, allegedly opened up for humanity by the "dawn of the space age". With several decades' hindsight, syntagms used to describe man's first ventures beyond the orbit of the Earth appear highly poetic, and thus metaphorical, even in the most restrictive use of the term: they conceptualize certain events and their (actual and potential) implications resorting to imprecise, yet rhetorically efficient images.

"The dawn of the space age" is, for example, a term that hints at a new beginning and at an emergence of new spatio-temporal coordinates with serious implications for the question of how to go on being human, and how to be a subject. This realization may be detected in many reflections on first manned spaceflight. For instance: "The fact of spaceflight marks today's world and our contemporary existence as people on the deepest level," claims Günther Anders (1994: 117). Anders (echoing and elaborating Hannah Arendt's reflections on the launch of the Sputnik and on "alienation of the earth" (Arendt 1998: 248–285)) interpreted spaceflight as a remarkable occasion that demonstrated to man, how small and unremarkable the Earth, the cradle of our existence, actually was when faced with the vastness of outer space. Around the same time, Lacan (1993: 45) theorized the first landing on the Moon as an event of discourse, which – along with certain other scientific achievements – postulated the autonomy of the signifier and therefore entailed radical consequences for the question of subjectivity.

Over time, both of these accounts seem to have been integrated into more conventional narratives: the first examples of man's interventions into the orbit of the Earth and beyond it became "predictable consequences" of a specific mixture of political circumstances and interrelated technological and scientific priorities. Spaceflight began to appear as a mere side effect of *Realpolitik* which favored the development of surveillance and other military technologies, as well as participation in a race that was once considered as a mere dream of certain somewhat suspicious, yet genius lunatics, such as Russian inventor Konstantin E. Tsiolkovsky. However, a certain fascination over the beginning of humanity's (ad)ventures in space remained. No matter how convincingly politicians and historians of science argued that there was nothing surprising about the sky-bound events of the late 1950s and 1960s, apart from, perhaps, the perseverance of the inventors and engineers,

and the heroism of the men (and women, and dogs) who were chosen to take part in the actual extraterrestrial adventures, an element of uncomfortable wonder persisted both in accounts of these events and in further scientific research, in one way or another connected to space exploration.

It appears that the "dawn of the space age" manages to remain *ambiguous*, on a very general, rudimentary level; its ambiguity does not lie in the mere fact its significance became interpreted from varying perspectives, but in the fact that these differing accounts tend to operate within varying coordinates of what the world and the human in it are. To put it simpler: it is not just that the beginning of the space age may be seen as a pivotal event for various reasons (e. g. some highlight it as a stepping stone of scientific progress, while others emphasize it as the first ever opportunity that mankind got to look at itself and its planet from a remarkable distance). What is more interesting about these claims and interpretations, is that they tend to take up the same metaphorical concept (the beginning of the space age, i.e. the dawn of a new, different era) as their *starting point*, in order to then use it on radically different levels, in radically differing cultural contexts, to produce socio-political and cultural myths with different functions. The metaphor is just as useful for (a) expanding humanity's horizons, for demonstrating that it will from now on be necessary to re-calibrate our comprehension of ourselves and of what we believe is our world, as it is convenient for (b) demonstrating that it is neither possible nor necessary for mankind to reconsider its most basic principles of existence and agency, as all our activity in space should be a mere extension and analogy of our activities on Earth. Furthermore, this same event (the first examples of spaceflight) is consensually recognized as a pivotal event in very different registries. The latter operates within an epistemology that cannot grasp metaphor otherwise than through analogy; the former also resorts to metaphor, but this metaphor is radically different: instead of searching for analogical associations, it points to the radically different, the unknown, the uncontrollable. Interestingly enough, this discrepancy has not to this point questioned the different accounts' capacity of producing statements of scientific/academic significance. Arguably, because the question of their use of metaphor and their own metaphoricity has hitherto been left unattended.

### **3 Space Conceptualism in the Contemporary Social Sciences and Humanities**

Let's examine how an attentiveness to metaphor, as both a poetic and a rhetorical, as well as a predicative and performative characteristic of concept-formation may alter what at first seems as an adequate and coherent step following the realization that a new circumstance (in our case, the dawn of the space age) requires a far-reaching change in perspective, that is, establishing a new research field. As stated above, at least three such (non-related to one another) steps were taken in the international community of the humanities and social sciences following the realization of the possibility of spaceflight: astrosociology, noocosmology, and cultural studies of outer space. Let it be emphasized that the fields are so new that it would be somewhat distorted to describe them as fully-fledged paradigms or closed structures with complete explanatory apparatuses. However, they are



all – albeit to a degree – institutionalized, and have inaugural texts that, to an important extent, dictate their primary aims, scope, and methodologies, and hinge on certain core concepts. All of this allows for an analysis of their epistemological frameworks, and in some cases provides enough evidence for one to position them in relation to the concept of metaphor, as we shall attempt to demonstrate in the following paragraphs.

### 3.1 Astrosociology

An Informal Discussion Roundtable of the 2004 American Sociological Association Conference witnessed a presentation by dr. Jim Pass, who delivered what was documented as *Part 1* of the *Inaugural* essay for a new “subdiscipline of sociology” – later to be recognized as a “multidisciplinary field” with substantial input from other social and behavioral sciences –, which the presenter proposed to name astrosociology. The *Essay*, which is freely accessible online, sketches out the need for both a new discipline (“astrosociology”) and certain novel concepts (such as “astrosocial phenomena”). In the essay, Pass emphasizes that humanity (and therefore societies) is ever more engaged in activities and connected to phenomena which are related to that which lies beyond Earth. He underscores that a need for a new field, which would focus exclusively on this development of our social sphere has, before him, been articulated by other scholars (e.g. Tough 1998), who proposed various related terms to coin the new discipline, such as social astronomy. However, Pass opts for astrosociology, taking “astrobiology”, officially recognized and supported by NASA, as an efficient example, and arguing that this solution would facilitate the eventual development of other astro- fields. The *Inaugural Essay* provides provisional definitions of astrosociology and astrosocial phenomena:

*A Working Definition. Astrosociology is defined as the sociological study of the two-way relationship between astrosocial phenomena and other aspects of society (i.e., non-astrosocial phenomena or other social phenomena) at the various levels of social reality and organization (i.e., the micro, middle, and macro levels of analysis).*

*The concept of astrosocial phenomena (have I coined a new concept?!) pertains to all social conditions, social forces, organized activities, objectives and goals, and social behaviors directly or indirectly related to (1) spaceflight and exploration or (2) any of the space sciences (e.g., astronomy, cosmology, astrobiology, astrophysics). It includes all outcomes of these phenomena in the form of scientific discoveries and technological applications, new paradigms of thought in the astrosocial and non-astrosocial sectors of society, as well as any resulting changes of social norms and values in any of the social structures of a particular society. Another component of the concept of astrosocial phenomena is that it includes all the norms, values, roles, and statuses that characterize social structures in the astrosocial sector (which is introduced in the next section). The concept of social phenomena is thus broken down into two major parts: astrosocial phenomena (as defined above) and non-astrosocial phenomena (a category which includes all types of social phenomena not considered to be astrosocial in nature). Astrosocial phenomena are thus a form of social phenomena which describe all the characteristics of social*

*structures, social groups, and societies created through human interactions and activities. (Pass 2004a: 7)*

Pass (2004a; 2004b) envisages a busy and fruitful future for the field, both in terms of its institutional development (university courses, departments, research institutes, etc.) and in terms of its substantial contribution to the international research and academic community. He believes that:

*The relevance of astrosociology increases in human societies because of at least three reasons extrapolated from the present: (1) pure scientific understanding continues to drive human beings, (2) applied science and technological change each improves living conditions, and (3) exploration continues to inspire and thereby lure individuals and their social groups into the unknown. These three interactive forces increasingly make astrosociology more relevant to societies because space represents the last great frontier, arguably at least as important in the grand scheme of things as the vast unexplored oceans of Earth. It is important to study the process of the growing intrusiveness and influence of astrosocial phenomena on human societies simply because it exists. (Pass 2004a: 7)*

Part 2 of the *Inaugural Essay* elaborates on these points, arguing that astrosociology or a study of astrosocial phenomena from a sociological perspective is highly necessary, as humanity seems to be moving from "Earthcentric" to "spacecentric" societies. Therefore, astrosocial phenomena pervade ever more spheres of social life, from norms, values, economies, to cultural production (such as science fiction), which may all be an object of astrosociological inquiry (Pass 2004b: 10–17). The essay concludes that:

*A large measure of astrosociology's relevance lies in the understanding of the changing nature of societies and how part of that change is traceable to astrosocial phenomena. Working in space and exploring its properties remain unarguably expensive. However, the benefits of knowledge, inspiration, and economic returns are difficult to duplicate by other means in the long term. Thus, the possibility of a spacefaring future exemplifies a rational extrapolation of past and current conditions rather than a "far out" dream. (Pass 2004b: 19)*

Astrosociology seems to be a step on the path of this "rational extrapolation of past and current conditions". Today, the discipline is chiefly being developed by the Astrosociology Research Institute (ARI, founded in 2008) – "a non-profit public benefit educational corporation" situated in California, headed by dr. Jim Pass. Since its appearance, ARI has done a lot of work promoting astrosociology (through participation of its researchers at various conferences, organization of astrosociological symposia, scientific publications, as well as educational projects, such as "Astrosociology in the Classroom"). Notably, astrosociology was the topic of a thematic issue of the *Astropolitics Journal* in 2011. ARI also runs its own online annual peer-reviewed journal, *Journal of Astrosociology*.

The Institute has a rather telling motto: "understanding space and society from a 'grounded perspective.'" (ARI 2015) Indeed, one of the strongest emphases of astrosociological research to date seems to be its ambition to equip humanity with insights into how to transfer whatever mechanisms and forms of social organization seem "functional" on

Earth, to potential life in outer space. On the other hand, it also attempts to demonstrate the impact of space exploration on society. It is concerned with questions such as global space governance and outer space law (e.g. Hearsey 2011), the role of the space sciences in education, the prospects of creating habitats in extraterrestrial environments (e.g. Lempert 2011), but not with the significance of the game-changing possibilities opened up by spaceflight. Most astrosociological research relies either on existent empirical data on processes in space or on logical extrapolations of ideas conceived and materialized on Earth (such are articles on the prospects of social organization of colonies on other planets). A general common feature of all of these inquiries appears to be that, rather than asking: "How to be human (or, as subject) of the space age?", astrosociology is concerned with the question of: "How to preserve human social structures, as we know them on Earth, in extraterrestrial environments?"

The outlook appears rather pragmatic: why delve into the unknown and possibly unknowable, when there is an option of tailoring parts of it to match up to what one is familiar with? For astrosociology, the beginning of the space age is, as is clearly stated in many of the texts published by astrosociologists, an extrapolation of what we know on Earth to outer space with the help of technological progress. Even if certain responses, reactions, mechanisms and procedures will differ in space, the question of whether this shift in environment might change what it means to be human and to act as an agent in spatial, rather than terrestrial coordinates, is not addressed or even posed. It may be concluded that astrosociology views outer space as an environment, analogical to Earth; the "space age" is merely an expansion in terms of space and humanity's technological capacities, rather than an event which might restructure our perception of both the world and our place in it.

### 3.2 Noocosmology

If the Cold War saw the USSR coin the term "cosmonaut" to counter the Western "astronaut", the contemporary post-Soviet Russian context has witnessed the appearance of a peculiar space-oriented cultural phenomenon, called noocosmology – a term that at first glance appears to be somewhat related to astrosociology. Let it be emphasized that there are many differences between the two new research fields, but they do share one feature: the recognition that the humanities and social sciences should discuss the beginning of the space age with the utmost solemnity.

Noocosmology, first documented under this name in 2010 by Arkady Aseev, is defined in the following way in the Security Issues [*Voprosy bezopasnosti*] scientific journal:<sup>3</sup>

*What is Noocosmology? Origin of this word is based on "nous" (also called "intellect", and in the deeper meaning – "the mind's eye") and "Cosmos". Famous Russian cosmist, Vladimir I. Vernadsky used term "Noosphere" as "sphere of human thought"; the same idea was in the works of Teilhard de Chardin. Thus Noocosmology could be called in a certain sense New Metaphysics. Binding concepts*

3. Unless stated otherwise, the quotes are official English translations, provided by the noocosmology.ru website.

*of other sciences, Noocosmology (New Russian Cosmology) is leading towards new discoveries and deeper knowledge about Cosmos. Following metaphysical tradition of Russian cosmists, Russian military specialists of the troop unit #10003 under the command of general-lieutenant Alexey Yu. Savin has developed method of metacontact (channeling) with the highest spiritual beings of our Universe. Due to this channel, Noocosmology receives new knowledge, yet unknown on our Earth. (Noocosmology 2015)*

Despite these overt references to metaphysics, which seems to be understood in the manner of 19<sup>th</sup> century philosophy, as aiming at something transcendent, beyond the realm of human reason and understanding,<sup>4</sup> in terms of form, noocosmology seems to possess all of the necessary requirements of an academic discipline. It positions itself as an emergent science: first mentions of the project, mainly accessible at the project's official website, run by its academic founders,<sup>5</sup> reach to 2013; despite its novelty, it appears to have engaged a number of Russian academics. The advocates of noocosmology regularly publish in scientific journals (mainly Security Issues – Qsec [Qsec. Voprosy bezopasnosti]), have authored and co-authored popular scientific and scientific monographs (mainly in the field of security studies, focusing on the Soviet and Russian secret services, and their interest (and achievements) in metaphysics, such as e.g. *The Mysticism and Philosophy of Special Services [Mistika i filosofiya spetssluzhb]* by Sokolov (2010). Furthermore, the authors and developers of the field try to keep in touch with a more general audience via seminars, video lectures and other relevant published materials, and a general call for contributions, questions, expressions of interest in the project (Noocosmology 2015). The website includes a list of the founding members of noocosmology (a transdisciplinary group of people involving philosophers, sociologists, a psychologist and psychoanalyst, and several intellectuals with a background in security services), a list of its partners (tellingly, the main Russian website on Russian cosmism, a project on Global Evolutionism, System Theory, Holism, and Panpsychism, and several security service websites (such as: an association of bodyguards called Grey Shadows [Serye teni] and Security Issues – Qsec [Qsec. Voprosy bezopasnosti] web portal and scientific journal)). Furthermore, it has a

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4. Here is a telling example of the noocosmologists' concise and not particularly precise mode of reappropriating philosophical ideas:  
*Plato's ideas were developed in a very original way by Russian cosmists – Konstantin E. Tsyolkovsky and N.F. Fedorov in the end of XIX – beginning of XX century. They took many approaches from Plato. First, postulate of genetic entity of man and Cosmos; second, belief in probability of leaning of Cosmos; third, idea of harmonic coexistence of Cosmos and man; fourth, belief that created by the Lord is not a play, but necessity; fifth, belief that it depends on a man, would he acknowledge prototype of creation of himself and Cosmos; sixth, assurance that cognition of Cosmos as first copy of the perfect sample is a step towards learning the heart of the matter. Russian cosmists predicted future. They anticipated dramatic change, observed by modern generations: change of the scale of creative work, globalization of social processes, required for further evolution of the humankind. (Noocosmology 2015)*

5. See <http://noocosmology.ru>

section with a general description of the project, a section titled "Science" [*Nauka*] with links to most of the relevant articles, specified as scientific on the website, and a glossary of terms. As close as this type of structure might be to an emergent scientific project and research spectrum, noocosmology does not, at least not on the website, exhibit any sort of links to or collaboration with scientific institutes (apart from abovementioned security studies).<sup>6</sup> Furthermore, it does not particularly advertise any possible research and scientific engagement of its founding members, apart from their recent publications, the nature of which remains slightly unclear: it is ambiguous whether these texts adhere to the standards of scientific publications or are rather just popular-scientific books, aimed at convincing a wider audience.

Although one might speculate that the ambitions of the project are not restricted to, or perhaps not even primarily of scientific and research nature, this is not entirely self-evident. The inaugural articles of the project (Aseev 2010; Aseev and Savin 2015) exhibit an ambition to position noocosmology as a fully-fledged science, at the same time, providing what seem to be unquestionable definitions of concepts such as, for example, happiness. Furthermore, as revealed in one of the variations of the definition of the discipline, the "science" [*nauka*] in question is often merged with "worldview" [*mirovozzrenie*]:

*/noocosmology/ synthesizes the fundamental ideas of various natural, social, and technical sciences, and presents an interdisciplinary direction of scientific inquiry, which is of worldview, natural scientific, and general scientific importance. Noocosmology should be viewed as a general scientific problem that greatly surpasses the framework of any particular science. (Noocosmology 2015)<sup>7</sup>*

This is done in ignorance of potent critiques of this view of science, put forth by a number of intellectuals: tellingly enough, Freud's (1933) interpretation of worldview, or *Weltanschauung* reveals it as a homogenizing, totalizing gesture of the Master signifier, which is not in the least similar to the research ethics of science.

It becomes clear from the texts that follow, such as *On Information and Energy* [*O informatsii i energii*] (Aseev 2015), *The Structure of the Spiritual Hierarchy of the Metacosmos* [*Struktura dukhovnoi khierarkhii metakosmosa*] (Aseev and Fonaryov 2015), that noocosmology does not address a scientific research problem. Rather, it seeks to provide a certain roadmap "toward happiness" [*k shchastiu*] (Aseev 2010), which requires both individual and collective effort. Noocosmology has a specific agenda, which hinges on the definitions cited above, as well as a set of axioms, principles, and governing laws. It may be rephrased in the following points. Firstly, noocosmology strives for oneness, complete integration of a) man and nature; b) discourses of various scientific disciplines; and c) two positions of enunciation: worldview and science. This radical integration seems to be hinging on an assumption that it is possible to find a way [*put'*], [*doroga*], i.e. a univer-

6. For the purposes of this text, security studies are understood as they are conceived in Russian scholarship, i.e. in the *Security issues* [*Qsec. Voprosy bezopasnosti*] journal. The journal discusses security as a psychological, sociological, economic and (geo)political category, relating it to human "wellbeing" [*blagopoluchie*] and "natural instincts" [*instinky*]. (Voprosy bezopasnosti 2015)

7. Translated by the author of the article (Majsova).

sally valid recipe to happiness, envisaged as something that requires an “expansion of the limits of cognition and knowledge of the Mind and of general processes of evolution to cosmic dimensions”.<sup>8</sup> (Noocosmology 2015) The main task of noocosmology is defined as “expanding human capabilities, psychologically, spiritually, morally, and energetically preparing man for knowing the cosmos in its primal form.” (Aseev 2010) This agenda is mainly backed by loose references to and isolated quotes from certain philosophers (e.g. Plato, Schelling, Vernadsky), who are, so it seems, quoted on the basis of authority (“great philosopher so-and-so”), in the manner of popular-scientific texts. Most systematic references are made to the Russian cosmists who are, in spite of much controversy in recent historical and philosophical debates, regarded as a “tradition of thought”, a “group”, a set of thinkers representing a clear agenda: the ability of the human mind to eventually master nature and gain access to certain “secrets of the universe”, such as eternal life and happiness. However, if cosmist texts of the early 20<sup>th</sup> century may and should be interpreted against the backdrop of widely spread romanticization of the potential of technological progress, today, they barely allow for literary, word-for-word interpretation, if to be treated as philosophical meditations (cf. Glatzer-Rosenthal, ed. 1997).

Furthermore, the promise of noocosmology is tied to a set of strict, instructive principles, and to an attitude, directed toward the community, and to a certain faithfulness, a fidelity not only to a set of ideas or guiding principles, but also to a set of – apparently military, as the project emphasizes the Soviet and Russian secret services’ privileged access to higher knowledge via the method of metacontact (Aseev 2010) – institutions and experts that have set them up. In this sense, the references of the noocosmological project no longer appear as an eclectic mix of famous thinkers, but rather a carefully constructed framework, secured by a double bind of authority: these very thinkers, and the “work of the Soviet and Russian secret services” (Noocosmology 2015). Moreover, the project is not devoid of a populist orientation: apart from the fact that it announces itself as a “worldview” prompted by the beginning of the space age and the extant meditations of a number of scientists and philosophers, the main issues at stake that it provides “answers” [*otvety*] to in its recent publications are love, happiness, the meaning of life, and security (cf. Aseev and Savin 2015). The choice of issues under scrutiny is most likely no coincidence: insofar as it positions itself as a new “worldview”, noocosmology has to attract the attention of “everyman”, and it seems to attempt to do just that by addressing issues, which are broadly discussed in popular-scientific press, which may be found in the “self-improvement”, “personality building” or “lifestyle” sections in general bookstores. However, noocosmology does more than simply describe these issues: it claims to guarantee insights into these issues using its innovative method of “channeling” (or “metacontact” [*metakontakt*]) which allegedly established contact with “Higher Intelligence” [*Vysshyi Razum*] (Aseev and Fonaryov 2015). If we leave skepticism toward such methods aside, it is still curious that noocosmology tends to position itself somewhere at the crossroads of religion, modern science, and philosophy, cunningly exploiting incoherencies in its form (which is academic) and content (which is esoteric, and, unusually for esoteric and

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8. Translated by the author of the article (Majsova).

mysticist thought, tied to state structures, such as the academic circles, journals, political concepts such as definitions of security).

Much like astrosociology, noocosmology only appears to be a reaction to the beginning of the space age as a radical, awe-inspiring event. It seems to link the dreams and reality of spacefaring to rather conformist, conservative socio-political ideas conceived on Earth. If astrosociology tends to focus on research that might allow humanity to better (psychologically, physically, etc.) adapt itself to the era and possibilities of spacefaring, noocosmology has no such ambition. Rather, the project tends to emphasize the need for transformations on Earth in order to become attuned to the "supreme knowledge" [*vysšee poznanie*] of the Universe. However, all of the attuning that it proposes, are old ideas of a rather rigid social order in new clothing.<sup>9</sup> The metaphor of the beginning of the space age seems to be taken as a cue for change, novelty, but in fact turns out to be exploited, turned into an analogy. If astrosociological accounts rely on existent empirical data and social structures in order to back their propositions, noocosmological accounts exploit an eclectic array of ideas, which are not tied into a fully coherent structure, in order to propose a new "worldview" [*mirovozzrenie*] – an all-encompassing paradigm which allows no escape.

#### 4 Cultural Studies of Outer Space and the Question Raised by the Arts

Apart from astrosociology and noocosmology, the significance of the space age has also been noted by several transdisciplinary investigations, which have been conducted since the beginning of the 21<sup>st</sup> century and can be subsumed under the signifier "cultural studies (of outer space)". Despite various methodologies and references, all of these studies start from the presumption that the space age is a cultural phenomenon, which means that it should be approached as such, and not only discussed with reference to technological progress. Cultural historians, perhaps the most common representatives of this emerging field, therefore usually proceed to discuss the historical cultural and socio-political circumstances of various space programs, as well as of space related cultural artifacts, such as comic books, space operas, cinematography, science fiction, memorabilia, etc., and practices, such as archiving, and art. Alexander C. T. Geppert, one of the most prolific researchers in this field, editor of *Imagining Outer Space: European Astroculture in the Twentieth Century* (2012), for instance focuses on astroculture – an "heterogeneous array of images and artefacts, media and practices that all aim to ascribe meaning to outer space while stirring both the individual and the collective imagination" (Geppert 2012: 8).

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9. The vision of society proposed by noocosmology does not directly correspond to any existent society. Rather, it seems to be a vision that conjoins messianic nationalism, which is part of the Russian national idea, promoted since the early 19th century, and witnessing a return in post-Soviet Russia (cf. Beumers 1999), new age ideas on spiritual self-improvement, and ideas of Russian cosmist Vernadsky and similar thinkers, on how (particularly upon arrival of the space age), man and society on Earth should focus on living in tune with the universal macrocosm.

This axis of cultural studies of outer space therefore takes up the "space age" as an important reference point, a signifier that calls upon the research community to reflect on all of the activities that have been inspired by the first cases of spaceflight. Nonetheless, it would not be correct to assume that cultural history of outer space treats the "space age" and related signifiers, such as "astrofuturisms", as merely one of many historical reference points; to the contrary, the texts demonstrate in their analyses an acute awareness of the tension between the cultural projections and expectations of the space age, and the actual "events" (spaceflight), and their aftermath. This tension or incoherency might be implicit, but it is an important indication of the persistence of the non-analogical trajectory of the metaphor at play – the space age.

Apart from cultural (and media) history, cultural studies of outer space at the moment comprise several important contributions that approach the space age from a less self-evident angle. For instance, while James Hay (2012: 29) argues that "outer space" has been invented as a "historical, geographic, and theatrical stage for shaping discourse about rights and responsibilities, war and peace, security and risk' is profoundly tied to the cold war era", Shukaiitis's (2009) analysis clearly demonstrates that its power to "mold" our perception of the world has not necessarily diminished. Shukaiitis (2009: 105–113) argues that outer space has always functioned as a "non-place" for humanity, therefore more than handy to absorb projections about it, which most fit circumstances on Earth. After the end of the cold war, these circumstances demand an ever greater horizon for capitalist expansion, which favors spending for space programs, and projects, such as space tourism. Yet, Shukaiitis believes that outer space – regardless of our capacity or incapacity to actually experience it – could be approached otherwise: as an imaginal machine:

*/I/t is not necessarily the feasibility of space travel or literal other-worldly exodus, but it may even be the case that the imaginal machine based around space imagery is made possible by its literal impossibility. In the sense that this possibility cannot be contained or limited, it becomes an assemblage for the grounding of a political reality that is not contained but opens up to other possible futures that are not foreclosed through their pre-given definition. It is in this sense that outer space plays its most powerful role in the building of imaginal machines, despite and through the ambivalent roles that it has and continues to play in some regards,*

continues Shukaiitis (2009: 105), which returns us to the question of metaphor. The issue addressed by Shukaiitis is our very capacity to look at outer space, this non-place for humanity, as it is used to understand itself on Earth, in terms other than mere analogy or an extension of what we know.

Shukaiitis's plea has not yet been heard or listened to in the realm of the academia, as we have demonstrated by the analyses of the above cases. However, this does not mean that it is entirely ignored. Radical transformation of humanity and subjectivity, and therefore of culture, in conditions beyond the atmosphere of the Earth, was envisaged by certain artists and theorists of the beginning of the 20<sup>th</sup> century, such as the Russian cubo-futurists. They might not have had the chance to experience the dawn of the space



age, but they harbored an awareness of its imminent subversiveness in relation to culture and humanity as they had been known and functioned before. Malevich (1920/1980) for example theorized the human future in outer space as a future of technology, machines, which will achieve "harmonious integration of form into natural activity through magnetic interrelations in a form which may be composed of all elements of natural forces, and therefore no engines, wings, wheels and fuel will be necessary, that is, its body, forming an entity, will not be made of different organisms" (Malevich 1980: 17).

Although it does not yet seem to be foregrounded in academic debates or in the evolution of research interests in the contemporary social sciences and humanities, this imminence of radical change of perspective was taken up by a wide array of artists engaging in 0 gravity and postgravity art. The radically subjective position of artists and art theorist steers clear of academic concerns about verification, or correspondence to a reality, either essential or not. The central project of post-gravity art, the 50 year long performance *Noordung 1995::2045*, by Dragan Živadinov, Dunja Zupančič and Miha Turšič, envisages a gradual transposition from flesh to technology, and from Earth to its orbit. "With the help of high-technology tools and the logic of Suprematism and Constructivism", the project engages "into research of postgravity art" (Postgravityart 2015). The opening performance of the project, which featured fourteen actresses and actors, took place in Ljubljana at 10 p.m. on 20 April 1995. Five subsequent performances are planned to take place over the next 50 years (the third one took place on 20 April 2015). Should one of the actors die, he or she will be replaced by a remote-controlled sign (*umbot*); male actors and their lines will be substituted by rhythm, while female actresses and their lines will be substituted by melody. The first *umbot* was featured in the 2015 performance, having replaced actress Milena Grm, who passed away in 2011. During the fifth and last repeat performance, scheduled for 20 April 2045, Dragan Živadinov, a candidate cosmonaut since 1998 (The Yuri Gagarin Cosmonaut Training Center, Star City), will use a spacecraft to convey 14 satellites/*umbots* into geostationary orbit. From there, they will transmit signals to Earth representing the roles played by deceased actors, while at the same time sending high-resolution 3D syntapiens projections of their faces into deep space.

The significance of this project is in its insistence on interpreting and *performing* "the beginning of the space age" on a level, which is close to the awe, reported by the astronauts, and which acknowledges that an entry into the "space age", if it is really to be considered a radical change in spatio-temporal coordinates, should entail a re-evaluation of the question of what it means to be human and what is culture in outer space.

## 5 Back to the Metaphor

Our analytical overview of three contemporary conceptual approaches to the beginning of the space age and its consequences within the humanities and social sciences points to several conclusive remarks. Firstly, the academic debate on space-related issues tends to perceive signifiers, such as the "space age" as mere poetic, rhetorical devices, which do not have much impact on reality, apart from serving as remarkable reference points.

Namely, while operating in two different sets of cultural coordinates (the first reliant on the U. S. space imaginary, and the second drawing on Russian expectations of the dawn of the space age), both astrosociology and noocosmology essentially take the "beginning of the space age" as an opportunity to reiterate previous, terrestrial paradigms of social order. The "space age" therefore becomes a mere analogy of contemporary life on Earth. As we have seen, this may be achieved in two different ways: by arguing for the efficacy of existent mechanisms and processes, operative within a certain social order, in order to advocate their extrapolation and adaptation for conditions beyond Earth (astrosociology), or by arguing that new insights, provided by the space age, require transformation, and then elaborating on this "transformation" using vague ideas and legitimating them using argumentation which resorts to authority (noocosmology). These two approaches manage to fully mask the inexplicability of the space age in terrestrial terms. Cultural studies of outer space, also greatly indebted to a certain terrestrial fixation, namely to the legacy of European reflections on the uncanniness of the dawn of the space age, offer more room for revealing this inexplicability. To an extent, this results from the circumstance that analyses of cultural ramifications of the beginning of the space age, in terms of texts or practices, always entail the question of the adequacy of "space enthusiasm" with regard to the achievements of the space age. The space age is here considered as a reference point, but is allowed to demonstrate at least some of its performative potential: the reality structured by cultural studies' analyses is always incomplete, and leaves a lot of space for alternative enquiries. Yet the most potent appropriation of the metaphor of the space age seems to come from artistic approaches, such as postgravity art. It makes no analogies, but seems to follow the main challenge posed by the space age: its performative implications, i.e. the question of how to be the changed subject, the transformed human, which can measure up to the space age as a redefinition of the coordinates of our existence. Four different metaphors, four different worlds to live with.

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Ilija Tomanić Trivundža

## **AND THE WORD WAS MADE FLESH, AND DWELT AMONG US: ON ZOMBIES, POLITICAL PROTESTS AND THE TRANSMODALITY OF POLITICAL METAPHORS**

### ABSTRACT

*Built around a case study of the zombie metaphor used to denigrate protesters during the popular political uprisings in Slovenia during the winter of 2012–2013, this article introduces the notion of a transmodal metaphor to capture the many roles and modalities which political metaphors can acquire when employed in societal power struggles. The article is based on a qualitative multimodal framing analysis of media reports on protests in six Slovenian print and online media, showing the prominent role the zombie metaphor and its many multimodal manifestations played as a framing device in mainstream media coverage of the protests and in their rejection of the protest paradigm as the prevailing mode of journalistic reporting of the protests.*

**KEYWORDS:** *metaphor, protest paradigm, framing, zombies, multimodal analysis*

### **Beseda je meso postala in se naselila med nami: O zombijih, političnih protestih in transmodalnosti političnih metafor**

#### IZVLEČEK

*Prispevek naslavlja vprašanje rabe političnih metafor znotraj političnih bojev, natančneje sposobnosti nekaterih metafor, da znotraj teh bojev prehajajo med različnimi modalnostmi (besedna, vizualna, fizična oziroma utelešena). Prispevek gradi na študiji primera transmodalne metafore zombijev, sprva uporabljene za kritiko protestnikov na Vseslovenskih ljudskih vstajah, ki pa so jo protestniki subverzivno apropiirali in spremenili njen prvotni pomen. Kot taka je potem odigrala eno ključnih vlog v procesu uokvirjanja novic, s tem pa pripomogla tudi k novinarski zavrtni poročanja o protestih znotraj ustaljenega modela protestne paradigme. Analiza uokvirjanja je narejena s kvalitativno multimodalno analizo člankov šestih slovenskih tiskanih in spletnih medijev.*

KLJUČNE BESEDE: metafora, protestna paradigma, uokvirjanje, zombiji, multimodalna analiza

## AND THE WORD WAS MADE FLESH, AND DWELT AMONG US: ON ZOMBIES, POLITICAL PROTESTS AND THE TRANSMODALITY OF POLITICAL METAPHORS<sup>1</sup>

*In today's political struggles, tweets are turning more and more into some kind of Molotov cocktails, which the government is throwing into the masses. A tweet is an amateurish, hastily produced weapon, though its use can have great impact. It is usually thrown into the masses to scare them or to create confusion.*

Renata Salecl, Twitter molotov

### 1 Introduction

The aim of this article is to demonstrate the need for a complex, transdisciplinary approach to the study of political metaphors. This is an approach which not only explains the meaning of structural or creative metaphors and their underlying potential to structure social reality but that can accommodate the dynamic "life" of political metaphors: their potential transformations in terms of meaning, form (modality) and use for the duration of a given political event. Interest in the study of (political) metaphors has been growing since the early 1980s within the framework that came to be known as Conceptual Metaphor Theory (CMT). This theory postulates that metaphors are not merely "an ornamental aspect of language but a fundamental scheme by which people conceptualise their world and their activities" (Gibbs 2008: 3). The theoretical and empirical research that followed was not simply about the various metaphors by which we live, to paraphrase the title of Lakoff and Johnson's (1980) pioneering work, but primarily about the fact that we live by the metaphors—that human cognition and information processing are essentially metaphorical. Yet the fact that the metaphorical permeates politics was widely acknowledged before the advent of CMT. This awareness dates back to the pioneering research on political propaganda and early inquiries into the function of symbolism within the domain of politics. The paradigmatic shift that CMT brought about was to treat the metaphors not as distortions of political discourse but as its inevitable, constitutive components. Put differently, CMT claims that politics, and by extension the political, cannot be non-metaphorical. However, as the field developed, several scholars started pointing out the shortcomings of its predominant "focus on verbal manifestations of conceptual metaphors" (Forceville and Urios-Aparisi 2009: 12), arguing for the need to overcome the "textual bias" and *monomodal* approach to the study of metaphors (e.g. Forceville 1996; El Refaie 2003). Over the last two decades, this broader conceptualisation of metaphors has been pursued through the concept of *multimodal metaphors*, generally defined as "metaphors whose target and source are each represented exclusively or predominantly in different modes"

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that include pictorial, written and spoken signs, gestures, sounds, music, smells, tastes and touch (Forceville 2009: 23-24).

The present article builds on this body of work (that has often been developed outside the field of CMT, for example, within discourse studies) by adding another layer of complexity. Building on a case study of a zombie metaphor that was initially used to denigrate demonstrators during the 2012–2013 mass political protests in Slovenia, the article introduces the concept of a *transmodal metaphor* to expose the shifting role and changing manifestations of the zombie metaphor during the three months of protests—namely, its ability to move between different modes, migrating from monomodal verbal utterances on Twitter to monomodal pictorial signs and multimodal representations on protest banners, lampoon film posters or political cartoons, to embodied performances by protesters masked as zombies. The aim of the article is not to provide a definite template for the investigation of transmodal metaphors but to highlight the potential focal points of such research by building on the case study of the zombie metaphor. Moreover, it makes a case for a trans-disciplinary approach to the study of metaphors by bringing together the conceptualisation of metaphors in cognitive linguistics, social movement theory's focus on *repertoires of contentious action* and the *protest paradigm*, and visual culture's emphasis on the communicative power of images under the conceptual umbrella of *framing*.

The article is structured as follows. First, it briefly describes the protests. This is followed by a presentation of framing as the theoretical framework for investigating the role which the zombie metaphor played in the media coverage of the protests. The next section analyses the meaning of the zombie metaphor. This is followed by a qualitative analysis of the media framing of the protests from the perspective of the protest paradigm. The results of the framing analysis are then opened up with a discussion of the connection between transmodal metaphors and the growing popularity of the carnivalesque repertoire of contentious action.

## 2 Uprising of zombies—building a case for a transmodal metaphor

Between November 2012 and March 2013, Slovenia was a site of ongoing political protests against (the corruption of) the political elites on a magnitude which the country had not experienced since it gained independence in 1991. The protests, which later came to be known as “people’s uprisings,” were a series of demonstrations organised mainly through social networks (mostly through Facebook) in which a variety of social groups, citizen initiatives and individuals from across the social strata participated. Unlike other forms of organised political struggle at the time—such as protests by trade unions or students and academics against the introduction of stark austerity policies and public sector budget cuts promoted by the right-wing coalition government led by the Slovenian Democratic Party (SDS) and its Prime Minister Janez Janša—the uprisings appeared to be popular, decentred contestations of political power, resonating with the *zeitgeist* of recent “Facebook protests” and “Twitter revolutions.” The protests started in November 2012 in

Slovenia's second largest city, Maribor, against the "corruption octopus" of mayor Franc Kangler, but by December they had outgrown their regional scope and had turned into country-wide protests against the corruption of the political elites. The first central demand of this popular contestation of and discontent with the political system was for the accountability of the political elite irrespective of ideological affiliation; subsequently, the list of demands was expanded to include "more democracy," "new faces" in politics and the protection of the welfare state. Although the discontent was directed at the political elites from both sides of the polarised Slovenian political spectrum, the protesters also specifically articulated their demands in relation to the stark austerity policies implemented by the SDS-led government, its promotion of neoliberal social reforms, and what was perceived as the increasingly authoritarian rule of Prime Minister Janez Janša.

The first All Slovenian People's Uprising (*Vseslovenska ljudska vstaja*) that took place on 21 December 2012 can be seen as a nation-wide crystallisation of the above-mentioned consensual demands, to which diverse social movements and initiatives would add layers of their more specific agendas and demands. As mentioned above, the uprisings were decentred, a palimpsest of contesting voices, which presented a problem for journalists covering the events as well as for the police and their attempts to control the events. Although a coordination committee was formed, and certain social movements, initiatives, groups and individuals were increasingly being identified (by the media) as representing the movement, the organisation of protests remained decentred, challenging the police in their search for the organisers of the officially unannounced (and, hence, from their perspective, illegal) protests. Between December 2012 and March 2013, four All Slovenian People's Uprisings took place before the movement eventually lost momentum subsequent to the institutional resolution of the political crisis. Following the waves of public discontent and the publication of the report of the Commission for the Prevention of Corruption which accused Prime Minister Janša of corruption, three of the five political parties left the coalition government, Janša's cabinet received a no confidence vote on 27 February and the new government (with the SDS now in opposition) was elected on 20 March 2013.

The zombie metaphor was initially launched on Twitter by the SDS as a comment on the first All Slovenian People's Uprising. The tweet—*#vstaja ? Communist international, rhetoric of civil war, totalitarian symbols? Uprising of zombies, not People's uprising!!!*—was one of several comments that the SDS posted on its Twitter profile on 21 December 2012, interpreting the protests, questioning the protest slogans and critiquing the reporting of journalists. Of all the tweets posted in relation to the first uprising, it was the zombie metaphor that caught the most public attention, and the first responses of the protesters to the "insulting tweet" were published during the protests. At the same time, the SDS's tweets also became the subject of news reporting, migrating from the domain of social media to that of mainstream media. Simultaneously, the Web users appropriated the monomodal textual metaphor and transformed it into a multimodal metaphor by creating humorous adaptations of zombie film posters, where the heads of the Prime Minister, his wife and government ministers were pasted onto the original film posters. By 22 December 2012, when Slovenian cultural organisations and artists organised their protest festival to oppose



government budget cuts for the funding of cultural productions, the metaphor had migrated to yet another modality, as a number of protesters attended the demonstrations dressed up as zombies. Thus, what started as a monomodal verbal metaphor quickly became an embodied, material metaphor. At the second All Slovenian People's Uprising on 11 January 2013, the number of zombie protesters was much larger, and these zombified protesters came to lead the protest march through the streets of Ljubljana. During the following two uprisings, their performances and interventions became a staple of protest performances—and one of the focal points of the visual coverage of the protests. Although the visual iconography of the protests included other "standard elements," such as the black and white "gotof si" ("you're done") posters with portraits of politicians, the large, white, origami-style masks and the clutched fist logo, zombies became one of the central visual and verbal signifiers of the protests.

The zombie metaphor was appropriated by the protesters in two main ways—it was either playfully *embraced* and worn as a badge of pride (e.g. Facebook users would add the word zombie to their names or zombify their profile photographs) or *inverted*, claiming that the "real" zombies were members of the political elite (images of zombified faces of leading politicians, especially of Prime Minister Janez Janša, became the staple of the protest banners). The slogans of the protest banners also frequently played with the metaphor, which quickly became part of the vernacular, political cartoons, journalistic commentary and political analyses. The "life" of the zombie metaphor, however, did not end with the resolution of Janša's government at the end of February 2012. Although markedly less visible than during the uprisings, zombies lingered long after the protests ended, in media as visual or textual references, until the 2012–2013 protests in political analyses, articles, books and photographic exhibitions and contests. Occasionally, they could be spotted at smaller protests organised from March 2013 onwards, serving as embodied visual reminders of the dormant potential of an active citizenry. The metaphor of the living dead was even given an "afterlife" in the form of a self-proclaimed religious movement named *Trans-Universal Zombie Church of the Blissful Ringing*, dedicated to the eradication of political corruption, which has remained active since its founding in March 2013.

The many "lives" of the zombie metaphor clearly indicate that if we are to understand the role of political metaphors in structuring the political, the conceptual framework employed should accommodate the dynamism of its potential transformations both in terms of modalities and in relation to its temporality. If we understand politics as a site of ongoing struggle over positions of power and (temporary) fixations of interpretations of social reality, political metaphors need to be seen as an integral part of these culturally and historically specific discursive practices, of their dynamism and of their *durée*. If metaphors are indeed more than simply "an ornamental aspect of language," if they are instrumental to how we think and act, since they structure our conceptualisation of the world, as Lakoff and Johnson (1980) famously claim, they need to be scrutinised within broader conceptual frameworks that account for the dynamism of their uses and incorporate both the *multimodality* and *transmodality* of the metaphors, such as various forms of discourse analysis or framing, which is the approach adopted in this paper.

### 3 Framing the protests

Framing is best seen not as a theory or a research paradigm but as a mid-range theoretical concept that enables the integration of different concepts and theories into the analysis of the processes of mediated communication. Although there is no overarching definition of framing, there is a set of underlying assumptions that most attempts to define it share. As Reese (2001: 11) argues, "Framing is concerned with the way interests, communicators, sources, and culture combine to yield coherent ways of understanding the world, which are developed using all of the available verbal and visual symbolic resources."

One of the central arguments for the adoption of framing for studying political protests is that communication is a central characteristic of this type of political action—the protest itself is a communicative act while, at the same time, the media communication about the protests is necessary and constitutive of the building of societal awareness of the protests. Since proportionally only a small number of citizens participate in the protests, for most of the population, the protests exist *in* and *through* mediated communication. The success of the protests, thus, to a large degree, depends on how the events and demands are communicated to the general public, and although this communication process is no longer fully dependent on mass media, social movements cannot solely rely on self-mediation "to mobilize political support, to increase legitimation and validation of their demands and to enable them to widen the scope of conflict beyond the likeminded" (Cammaerts 2012: 119).

Thus, the issue of framing—on how mainstream media select and present news to the general public and centres of symbolic social power—remains of central importance to the success of social movements or, in our case, of protesters. In one of the most widely adopted definitions, framing is defined as the process of selecting "some aspects of a perceived reality and make them more salient in a communicating text, in such a way as to promote a particular problem definition, causal interpretation, moral evaluation, and/or treatment recommendation for the item described" (Entman 1993: 52), whereby this "selection" is done in such a way as to contextualise a given event within a pre-existing cognitive schema. One strand of framing, within which this article positions itself, focuses on the question of how this selection is achieved through various *framing devices*—"specific linguistic structures such as *metaphors*, visual icons, and catchphrases that communicate frames" (Reese 2009: 19; my emphasis). These framing devices, such as metaphors, activate cognitive schemas that make up cognitive frames—configurations of salient attributes that help individuals process and retrieve information (Scheufele and Scheufele 2010: 116). Framing is not to be equated with the notion of journalistic bias—it is an inevitable part of the news narration process—of the need to select and structure information, of production routines and journalistic values, but also as a result of journalists' dependency on sources, which often compete to promote different causal or moral interpretations of the events. In the process of news reporting, the journalists not only interpret and select the frames of competing social actors but also structure the events according to their own pre-existing frames, overlaying the "provided" frames with "narratively functional frames" and pre-existing macro-cultural frames. Thus, several authors distinguish between different *frame types*:

(1) macro-level frames, also referred to as journalistic frames (Snow and Benford 1992), which are closer to narrative strategies (e.g. conflict or horserace frame); (2) meta-frames or enduring (cultural) frames (Gamson and Modigliani 1989) that can be applied across different events (e.g. archetypal themes, such as villain vs. hero, or culturally-specific ones, such as Orientalism); and (3) the more micro-level, event-specific frames. Framing theory also accounts for the dynamics and multilayeredness of the framing process through the concept of *frame phases*. In cases where reported content cannot be immediately subsumed within one of the pre-existing frames, the news reporting will go through various phases: (1) *the definition/conflict phase*, where social actors will try to gain media attention and establish "a specific point of view as an appropriate frame for the issue"; (2) *the resonance phase*, during which a particular frame will become ascendant when it "resonate[s] with the values and experiences of the public"; and (3) *the equilibrium or resolution phase*, which will be marked by the establishment of a dominant frame (Miller and Parnell Riechert 2003: 111-113, cf. Entman 2004: 48). The establishment of a dominant frame does not imply the end of framing contestations: although the dominant frames tend to be persistent interpretations, they are not permanent and can be challenged by the emergence of new information or salient framing devices, such as images or metaphors, particularly if they resonate with a commonly shared sentiment.

The notion of frame contestation is particularly important in contemporary communication environments, where traditional media institutions no longer have a monopoly over public communication but operate within a cacophonous communicative environment of web-based self-communication, where they willingly or unwillingly compete with voices "broadcasted" through social media platforms, such as Facebook or Twitter. These platforms, especially Twitter, have recently become associated with the potential for democratising public communication, serving as an alternative channel for gathering and disseminating information and promoting alternative voices, especially under political regimes that limit the freedom of the media (e.g. Meraz and Papacharissi 2013; Lim 2012; Burns and Eltham 2009). However, Twitter also represents an alternative media infrastructure for established political actors, giving them not only a high degree of control over the content, timing and style of communication but, due to the production routines of the mainstream media, also a privileged position in public discursive struggles. In particular, the existing research on the use of Twitter for political communication indicates a tendency to use the platform for the one-way transmission of information (e.g. Golbeck et al. 2010; Larsson and Moe 2011; Graham et al. 2013). Thus, political actors do not primarily adopt Twitter because of its potential for facilitating access to and interaction with the citizens but because it has become part of the "ambiental" practices of the information gathering and sharing (Hermida 2010) of important public figures, opinion leaders and especially journalists. Consequently, for established political actors, tweets become the tightly observed gates through which their opinions and frames can enter the mainstream media. Such use of Twitter enables political actors much more "free" expression of opinions and value judgements, and it opens up space for commenting among competing political actors, which would be unacceptable if expressed via other communication channels, often bordering on defamation or hate speech. It also offers them the opportunity to interpret or challenge

the media agendas and media frames, leading to what McCombs (2005) describes as *intermedia agenda setting*.

The SDS's tweeting on the first All-Slovenian People's Uprising is an illustrative case of this type of communication, of using social media to engage with frame contestation. In a series of tweets, the political party offered its evaluative interpretation of events in an attempt to (re)frame the protests, launching what would become a potent framing device (the zombie metaphor), attacked its political opponents attending the event and openly critiqued journalists and their reporting of the events. Previous practices of the SDS in its use of the platform, the relatively scarce interaction the zombie tweet produced on Twitter (it received only 5 likes and 14 retweets as well as 29 negative comments with which the party did not engage), and its quick rebroadcasting by the mainstream media also point to the fact that the tweet's primary target audience was not general Twitter users or party supporters but the journalists. Commenting on the protests and the use of social media by protesters and the government, quoted in the epigraph to this article, Renata Salecl (2013) vividly described tweets as "turning more and more into some kind of Molotov cocktails, which the government is throwing into the masses" in order to create panic and confusion. However, both the case of the zombie tweet and research on the political uses of Twitter seem to indicate that the primary target of these "amateurish, hastily produced weapons" was not the masses but the journalists, for it seems that in order to have a significant impact, the Molotov tweets needed the amplifying power of the mainstream media. Furthermore, the fire that they ignited might not necessarily have been that of panic or confusion but of mobilisation.

#### 4 Zombie metaphor as a framing device

From the framing perspective, the zombie metaphor is a framing device employed by one of the social actors in order to promote a particular problem definition, causal interpretation and moral evaluation of the event, whereby the selection of certain aspects of the social reality is done in such a way as to contextualise a given event within a pre-existing cognitive schema. In the case of the SDS tweet, this pre-existing cognitive schema was that of the ongoing conspiracy of the former communist elite and its supporters dominating Slovenian politics and the economy from the backstage. The SDS has been using several catchphrases (framing devices) since the mid-1990s to designate what it perceives as a failed transition, the most widely used being *udbomafija* (coined from the abbreviation of Yugoslav secret service UDBA and mafia) and *strici iz ozadja* ("uncles from behind the scenes"). This meta-frame of ongoing communist conspiracy has been continuously evoked by the more micro-level, event-specific frames and framing devices. One such example would be the catchphrase *opankarsko novinarstvo* ("opanak journalism"), coined from the expression for traditional Serbian peasant footwear and used to critique journalistic reporting.

The zombie tweet openly served three of the four main framing functions defined by Entman (1993)—namely, the promotion of a particular problem definition, causal interpretation and moral evaluation. By increasing the salience of some aspects of the protest

(exposing only the overtly leftist political iconography displayed by a minority of the protesters), the SDS attempted to delegitimise the demands put forward by the protesters. The metaphor PROTESTERS ARE ZOMBIES evokes the schema of manipulation by the former communist elite, delegitimising and even inverting their demand for the change of the political elites. Denouncing their autonomous agency, the protesters are pronounced to be mindless agents of the former (dead) regime—the living dead returning from the other world in order to haunt the living. The SDS' choice of the zombie metaphor as a framing device for contesting an emerging news frame and building an alternative interpretation of the uprisings is not as unusual as it might appear. Although it has no direct resonance with Slovenian culture or history, zombies are instantly recognisable members of the global popular culture's pantheon of monsters, whose mention quickly conjures up images of slow-mannered, blood thirsty automatons from horror films, and the immediacy of the responses to the SDS's tweet by both citizens and mainstream media testifies to its quick recognisability and global cultural resonance.

Zombies were "born" out of a misrepresentation of Haitian voodoo rituals in 1930s Hollywood horror films and can be seen as a specific ideological construct, an allegoric mix of political, economic, cultural and religious anxieties of the early 20<sup>th</sup> century—anxiety that a successful slave rebellion would result in the reverse enslavement of the white population (Bishop 2010, cf. Kee 2011). Although zombies initially served a particular ideological function within a specific socio-economic worldview, they quickly proved that they can travel well across time and cultures. The genre has undergone a number of transformations since its initial appearance on the silver screen, and it was most influentially redefined by film director George A. Romero, starting with the low-budget production, *Night of the Living Dead* (1968). The ongoing redefinitions of the genre, evident also in Romero's own opus, points to the symbolic potential and ongoing relevance of the zombie metaphor. Thus, after the temporary decline of the genre in the late 1980s and 1990s, the 2000s witnessed an unprecedented revival. The number of (US) popular culture texts and products on zombies, ranging from films and TV series to computer games and even perfumes, has grown exponentially compared to other popular culture monsters, signalling that zombies might be an ideal metaphor for reflecting the "prevailing social anxieties—such as oppression, violence, inequality, consumption, and war" (Bishop 2010: 207, cf. Lauro 2011) in the post 9/11 era.

As an allegoric metaphor, the zombie is a mix of more generic, universal anxieties linked to the loss of subjectivity and death, with specific cultural or political concerns about the radically endangered present. Regardless of their many incarnations, zombies are essentially characterised by the losses of autonomy and volition, which can be the result of either enslavement or infection. A zombie is a character that has lost an essential component of what makes him or her human. The second central characteristic of zombies is that they—since they lack essential humanness—also lack any capacity for cognitive processing or emotional affection. The living dead are characterised by a non-functioning, rotting brain, which accounts for their low intelligence and instinctive behaviour. They are also ruthlessly cruel; they subject their victims to extreme violence, not by killing them but by eating them alive. These two basic characteristics of zombies result in two additional

implications. First, the loss of volition implies a loss of voice. Zombies merely fulfil the command of the zombie master or obey the cannibalistic instinct of the living dead. As they possess no consciousness, they cannot form opinions or value judgements, they cannot speak, and they have no ability to organise themselves; in short, zombies lack a voice. Second, the lack of rationality and emotionality also implies that there is no possibility for humans and zombies to coexist. "Zombies cannot be reasoned with, appealed to, or [be] dissuaded by logical discourse," argues Bishop; therefore, zombie narratives end with the total annihilation of either the living dead or the living (2010: 20).

Given these four implications, it is not difficult to see how the zombie metaphor resonated with the SDS's condemnation of the protesters. Through the use of the metaphor, the protesters are rendered voiceless automatons who, being unable to think, cannot form autonomous opinions or autonomously determine their actions, but instinctively and relentlessly fulfil the wishes of the slave master. Endangering the society as a whole, they threaten to devour the painfully gained Slovenian democracy, of which the SDS is a self-proclaimed promotor and guardian, and which is embodied in the figure of one of the "heroes of Slovenian independence," Janez Janša.

## 5 Zombie metaphor and media framing of the uprisings

The aim of this section is to highlight the role that the zombie metaphor played as a framing device in the process of the news reporting on the All Slovenian People's Uprisings. The section, thus, does not provide a typical (quantitative) framing study of media reports on the protests but rather offers a brief inductive multimodal qualitative overview of the ways in which the zombie metaphor was used to frame the media reports on the protests. The analysed sample included news items, analysis and political commentary in print editions of two main Slovenian daily newspapers (*Delo* and *Dnevnik*), two main online news websites ([www.rtvlo.si](http://www.rtvlo.si) of the public broadcaster TV Slovenia and [www.24ur.com](http://www.24ur.com) of the commercial broadcaster POP TV), and two political weekly magazines (*Mladina* [with a liberal leaning]) and *Reporter* [ideologically linked to the SDS]). The sample included diverse mainstream media outlets with different styles of reporting, political leanings and levels of professionalization. The time frame of the analysed sample was from 20 December 2012 to 10 March 2013, focusing on articles on the four All Slovenian People's Uprisings. In total, 149 articles published during this time frame were analysed by the author. In addition to this primary sample, articles published by the six media outlets between 12 November and 20 December were analysed to provide the temporal dimension and insight into the frame building and frame contestation phases.

The analysis focused on the interplay between the macro-level journalistic frames that could be related to routine journalistic reporting and event-specific news frames. Although the uprisings were a novel event in contemporary Slovenian political history and would therefore, in principle, need to undergo the definition/conflict phase of framing, they were also part of a familiar *repertoire of contentious action* (Tilly 1986). This made them susceptible to what is described in the social movement literature as *the protest paradigm*—a tendency of the mainstream media to negatively cover the activities highlighting

social movements which challenge the established socio-political order. According to the protest paradigm, the media will tend to focus on protest action, conflict and violence, and through this obscure the issues being raised while simultaneously contributing to the marginalisation of the movement by presenting the actors involved as socially deviant or normatively different from the non-protesting audience (Chan and Lee 1984; McLeod and Hertog 1999). According to McLeod and Hertog (1999), the mainstream media reporting on protests will be characterised by (1) an overt *reliance on official sources*, (2) a normative invocation of *public opinion* (presenting protesters as a dissenting minority), (3) *delegitimation* (not explaining the issues), (4) *demonisation* (focus on negative consequences of protests) and (5) the use of the negative *news frames* of a *crime story*, *riot* or *carnival*, instead of a positive frame of *debate* (i.e. issues and arguments being raised). From the perspective of framing theory, the division between the issue-related and non-related frames that McLeod and Hertog (1999) imply can roughly be mapped on the division between journalistic and issue-specific frames.

### 5.1 The dominant journalistic frame and the reversal of the protest paradigm

The analysis indicates that the reporting of the Slovenian print and online media on the uprisings does not easily fit the blueprint of the protest paradigm. The reports initially followed the structure of the protest paradigm, especially the initial reports on the protests in Maribor and the early December protests in Ljubljana, in which violence and a threat to national security (*riot* and *crime story* frames in McLeod and Hertog's typology) together constituted the predominant frame, in line with the analysis of the TV news framing (Mance et al. 2015). The dominance of *riot* and *crime story* over *debate* (demands of protesters) frame was particularly evident in the use of images, where scenes of violence, fire, smoke and teargas, of masked protesters throwing projectiles and interventions of the riot police were prominent in all media outlets, regardless of their political leaning and whom they blamed for the violence. Thus, two competing violence frames were in circulation—one advocated, for example, by the liberal weekly *Mladina* which focused on police brutality, while the pro-SDS weekly *Reporter* promoted the frame of violent protesters. This definition/conflict phase of the framing was also characterised by a *reliance on official sources* (representatives of government and police) and *demonisation* (focus on the damage caused by the protests). While *delegitimation* was not present in the "classical" sense of the protest paradigm—the issues and demands of protesters were explained and reported on—the focus on the violence delegitimised their demands as non-democratic, as "disrespectful toward the civilized rules of rational engagement set out by liberal representative democracy" (Cammaerts 2013: 526).

However, the resonance phase of the violence frame proved to be somewhat short-lived. By mid-December, the *riot* and *crime story* frames—with the notable exception of *Reporter*—had been replaced by the *debate* frame. Although the *riot* frame did not disappear from the mainstream news coverage, it was overshadowed by the presentation of the demands and issues raised by the protesters. Thus, the media continued to report, both in words and particularly in images, on any incidents of violence or conflict between

protesters and police, and the violence continued to be used as a legitimising factor. It was precisely the abstention from the use of violence that made the demands of the protesters legitimate and enabled most of the media outlets (with the exception of *Reporter*) to draw the line between the “good” and “bad” protesters (e.g. extreme right-wing groups).

The emergence of the debate frame as the dominant media frame for covering the protests was characterised by a literal inversion of the protest paradigm (again, with the exception of the pro-SDS weekly *Reporter*). In the accounts of the protests during this stage, the official sources were marginalised—they gave way to the eyewitness accounts of journalists and to the opinions of the protesters. Representatives of various civil society groups and movements were sourced for statements, and the invocation of public opinion was achieved through numerous statements and opinions of the protesters (e.g. *Dnevnik* and *Delo* both published long articles presenting *vox populi* through the views of randomly selected protesters). These were not the bystander reports that would draw attention to the deviance from social norms typical of the protest paradigm; on the contrary, they were presentations of the opinions of people from all walks of social life, voicing common concerns and expressing common values and social norms. By continuously giving a voice to protesters, the media outlets represented them as defenders of the core values of the “we” community, of the values and ideals that inspired the struggle for Slovenian political independence, which were seen by the protesters as having been stolen from the people by the political elites. Put differently, the peaceful protesters were not represented as a threat to (liberal) democracy; precisely the opposite, they were advocates for more democracy.

## **5.2 Zombies and the issue-specific frame of legitimate political representation**

By late December 2012, the *debate* frame was firmly in place as the dominant macro-level journalistic frame, and *democratic governance* (i.e. legitimate political representation) started emerging as the dominant issue-specific frame. It was precisely this issue-specific frame of democratic governance that became the target of the SDS’s tweets during the first All Slovenian People’s Uprising. Throughout the protests, the SDS continuously emphasised that the protests were part of a (ex-communist) conspiracy to overthrow a democratically elected government and argued that the opinions of the protesters were not representative of the political will of the general population. Thus, for example, during the first uprising, the SDS also tweeted that “Any single SDS MP received a higher number of votes than is the total number of protesters at the so-called all Slovenian uprising of the nation.”

Essentially, the contestations over the dominant issue-specific frame can be described as a struggle between what Manin (in della Porta 2013: 24) calls “democracy of the parties” and “democracy of the people.” The SDS’s zombie tweet was part of this issue-specific frame contestation, and the metaphor was to function as a vivid framing device that would both promote a particular interpretation of the demands raised by the protesters and tie the interpretation of the ongoing political events within the established, pre-existing cognitive schema of conspiracy of the former political regime and the bi-polar division of the Slo-



venian political spectrum. If the zombie metaphor appears to have been unsuccessful in challenging the emerging issue-specific frame within the mainstream news reports on the protests, it did succeed in firmly securing the novel political demands being raised by the protesters within the bi-polar (and from the SDS's perspective, also Manichean) political spectrum. This division between the democratic "us" and the undemocratic "them" was evoked not only discursively but also with actions, such as organising a public gathering in support of the Prime Minister and his government on the same day that the third uprising took place.

The protesters as well as most of the mainstream media labelled the zombie metaphor as a sign of the arrogance of the political elite, as the unwillingness of the ruling party to listen to the concerns expressed by the citizens. The metaphor, which in the analysed articles is described as a cynical and arrogant insult, triggered two types of reactions from the protesters. The first reaction was the *inversion* of the claim, in statements and on protest posters, and especially in the visual modality of the protest signs and banners which displayed representatives of the political elite, and especially Prime Minister Janša and members of his cabinet, as "true" zombies. A prominent example of this is the 7 February cover of *Mladina* displaying zombified portraits of the seven leaders of the largest political parties with the caption, "Is there an alternative to the zombies?" The zombified portrait of the Prime Minister on that particular cover would later appear as a demonstration poster and in several photographs published in *Delo*, *Dnevnik* and on the two analysed websites displaying protest posters with a verbal or visual inversion of the metaphor (one often reproduced photograph, for example, depicts a zombified, green Janša behind bars). The second, and far more frequent and salient reaction to the metaphor, was the playful *appropriation* of the label. In the words of one protester, "We used zombies because we unfortunately had to. I wanted to explore other forms [...] but then it was natural that we adopted zombies. Everybody identified with them" (*Dnevnik* 2 February). The self-zombification of protesters that started as a reaction to an insult resulted in the migration of the textual metaphor into a visual and embodied one.

However, the embodied performances enacted by protesters dressed up as zombies (e.g. theatrical staging of an attack on demonstrators wearing white masks representing politicians, chaining of zombies to the gates of the National Bank, leading the protest marches through the streets of Ljubljana and their temporary "conquering" of public spaces) were not simply symbolic claims and playful theatrical acts aimed to liven up the protests. They were also media spectacles, performances intended to be mediated by the mainstream media. Or in the vocabulary of social movement theory, they were a repertoire of contentious action aimed at a particular media opportunity structure (Cammaerts 2012). However, once transformed into photographic representations, the images of zombies did not end up merely as the latest edition to what is usually a fairly standardised visual iconography of protests. The photographs of zombified protesters were not used only to report news on the protest activities but to have in the printed press. Thus, in the period between the uprisings, these images regularly appeared alongside analytical articles and political commentary, serving as a continuously present visual icon—a visualised, embodied metaphor of a political statement. In other words, the photographs of zombies came to

serve as iconic visual reminders of the arrogance of the political elite, as a metaphor for the struggle for active citizenship, for the disconnection between the elites and citizens, and for the right to a voice. From the perspective of the protest paradigm, the media focus on zombies signals the possible introduction of yet another frame—that of protests as *carnival*. Yet the images of the zombie carnival are not typical images of the *carnival* frame of the protest paradigm, since the mask that is at the centre of the carnival—the zombie—already bears the imprint of a political statement, of the issues being raised.

## 6 Discussion

This move from a monomodal verbal metaphor to an embodied, carnivalesque performance would certainly require further comparative research on the connection between transmodal metaphors and practices of public shaming and ridicule within contemporary citizen activism. It would also require a separate, although sketchy discussion within the framework of the present study. The move to carnivalesque performance is by no means unique to the uprisings. During the last two decades, social movements have increasingly been using various forms of carnivalesque direct action or tactical frivolity (e.g. interventions of Clandestine Insurgent Rebel Clown Army or Pink Fairies) to gain media visibility and public support, to avoid violent confrontations with police, but above all, to ridicule either figures of authority or the concept of authority itself. As Cammaerts (2012) notes, such a shift in the selection of available strategies for questioning social power and making political claims within a given epoch might signal a shift from a modernist repertoire of contentious action to a new repertoire that is much closer to what Tilly (1986) describes as the feudal repertoire, which relies more closely on performative and symbolic, on parodic reversal of roles, and on practices of public ridicule and shaming.

This “refeudalization” of contemporary forms of contentious action can be linked to a certain “refeudalization” of contemporary politics. In times when the democratic deficit is growing at a similar pace as social inequality, the increased favouring of the feudal-like repertoire of contentious action might be understood as a response to what Habermas (1962/1991) described as the refeudalization of the public sphere. Admittedly, Habermas’ refeudalization thesis needs to be adapted to account for the contemporary conditions of public communication, but his basic underlying arguments are still valid today. Namely, that in the conditions of the growing power of market-driven capitalism, the public sphere becomes dominated by commercial interests that eschew critical publicity in favour of commercial spectacle and the public display of power of the increasingly self-sufficient political elites. With the growing influence of the market over the past three decades, the ability of citizens and the willingness of the political elites to control the dominance of capital through public administration have greatly decreased, leading to a situation in which major legislative decisions are (preferably) confined to arkanum, without much media exposure or informed critical public debate. An illustrative example of this is the present negotiations on the Transatlantic Trade and Investment Partnership (TTIP), where the policy of closed doors was defended with an argument that the agreement is too complex for the public to understand. Within the

same context, the increased detachment of technocratic and political elites from citizens is illustrated by EU Trade Commissioner's Cecilia Malmström's response to a question on public critique of TTIP, where she stated the following: "I do not take my mandate from the European people" (Hilary 2015).

As it is used here, the refeudalization describes a process whereby the political elites become increasingly detached from the citizens, where major political decisions are a matter of negotiations with representatives of the economic system, rather than the social system, and where citizens are, apart from the periodical plebiscitary support of political elites during elections, reduced to a mere audience for the spectacle of power, much akin to the representative publicness of the *ancien regime*. It is true that especially since the proliferation of the Internet and social media, the conditions of public communication have changed: the public is no longer entirely cut off from the circulation of information, there are (limited) spaces for critical publicity and public reasoning, and the public possesses some means for communicative and political organisation and mobilisation. However, refeudalization, to a large degree, remains characteristic of the mainstream media, partly because of the economic conditions and partly due to the journalistic routines of news production. The case of the All Slovenian People's Uprisings shows that the refeudalization of the public sphere is not absolute—that the present communicative spaces do offer some space for critical public reasoning—but it also indicates that the opinions aimed at radically challenging the political establishment require the collaboration of mainstream media in order to achieve political efficacy. In the case of the uprisings, it was the change in the mainstream media reporting (framing) of the events, the rejection of supporting the representative role of the public display of the power of political elites embedded within the routine practices of news reporting that enabled the public to become more than a passive spectator of the display of institutionalised power, akin to what Habermas described as *representative publicness*.

Therefore, one of the central questions that future research on transmodal metaphors should address is whether the move towards the more feudal repertoire of contentious action is indeed an effective method of challenging the less accountable and, by extension, more feudal-like forms of political power. From this perspective, it seems apt that the zombie protesters chose to name the ruling political elite after the most aristocratic figure of the monster pantheon—the vampire. But can zombies (the masses, the discontent citizens) really defeat vampires (the political elite) by moving from inserting critical discourse into the public sphere to carnivalesque performance? Or do performative, symbolic shaming and ridicule mark the zenith of the "actual" power of the discontent citizenry? Performative and carnivalesque might indeed help to transform anger and frustration into group solidarity and turn the world upside down, but such a disruption would only be temporary. The problem with the carnival is, as Fletcher (2009: 233) points out, precisely that it is *not* a revolution.

## 7 Conclusion

This article argued for the necessity of a more complex approach to the study of political metaphors in order to capture the many roles and modalities which they acquire when they are used in societal power struggles. Building on the case study of the zombie metaphor, the concept of a *transmodal metaphor* was introduced to account for the ability of a metaphor to move from a monomodal utterance to multimodal representations and embodied performances. The results of the qualitative framing analysis show that the zombie metaphor, once appropriated by the protesters, played a prominent role as a framing device in securing the issue-specific frame of democratic governance and supported the macro-level journalistic frame of the protests as debate.

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## METAPHORS IN THE DISCOURSE OF THE NATIONAL

### ABSTRACT

*This article provides a general overview of the intersecting fields of metaphor research and research on 'nations' and 'the national', reflecting on the levels at which metaphor is relevant to the study of these concepts. Many case studies concentrating on specific issues, such as EU integration, have demonstrated that metaphors play a role in constructing both national and supranational identities (see e.g., Marks 2004; Hülse 2006; Musolff 2000 etc.). However, a general overview of the levels at which metaphors are relevant to the study of 'the national' is still lacking. This study addresses these levels by focusing on three topics: the banal reference to the nation as a personified individual and its possible implications, the family metaphor as the key metaphor that constitutes the nation and related concepts in public and nationalistic discourse, and the type and role of metaphors in scholarship concerned with nations.*

**KEYWORDS:** *conceptual metaphors, deliberate metaphors, conceptualisation of nations, nationalism*

### Metafore v diskurzu o nacionalnem

#### IZVLEČEK

Članek nudi splošen pregled prekrivajočih se področij raziskovanja metafor ter raziskovanja »nacij« in »nacionalnega«, pri čemer obravnava ravni, na katerih je metafora relevantna za preučevanje teh konceptov. Mnoge študije primerov, ki se osredotočajo na specifična vprašanja, kot je evropska integracija, so pokazale, da metafore igrajo določeno vlogo pri ustvarjanju tako nacionalnih kot nadnacionalnih identitet (glej npr. Marks 2004; Hülse 2006; Musolff 2000 itn.). Vendar pa še vedno manjka splošen pregled ravni, na katerih so metafore relevantne pri preučevanju »nacionalnega«. Pričujoča študija te ravni obravnava tako, da se osredotoča na tri teme: banalno nanašanje na nacijo kot poosebljenega individuuma in možne implikacije tega nanašanja, metaforo družine kot ključno metaforo, ki konstituira nacijo, in povezane koncepte v javnem in nacionalističnem diskurzu ter tip in vlogo metafor v znanstvenem raziskovanju nacij.

**KLJUČNE BESEDE:** *konceptualne metafore, namerne metafore, konceptualizacija nacij, nacionalizem*

## 1 Introduction

In discussing metaphor in relation to the nation and the national (objects of nationalism's concern), it is important to consider a number of other related concepts (e.g., state, country, and nationalism). In discourse by politicians and in media discourse, as well as in informal discourse (e.g., comments on online newspaper articles), however, borderlines between countries, states, and nations are often fuzzy: proper names such as *Serbia* may refer to a country, state, and nation. Only occasionally is the usage disambiguated by mentioning the words for 'nation', 'country', and 'state' (e.g., *Srbija među pet najstarijih nacija na svetu*<sup>1</sup> 'Serbia among the five oldest nations in the world'). The difference between these concepts is occasionally emphasized; for instance, *Volim zemlju Srbiju, mrzim drzavu Srbiju*<sup>2</sup> 'I love the country of Serbia, I hate the Serbian state', where the border is drawn between the country (e.g. its landscapes) and the state (e.g. its institutions).

The terms *nation* and *state* are often used interchangeably, not only in public discourse and everyday language, but also in research literature. A discussion of the differences between these concepts is beyond the scope of this paper: I refer to both dictionary and encyclopedia<sup>3</sup> definitions, and to research indicating the vague borders between them (e.g. Guibernau 2013; Smith 2014) or their problematic nature (e.g. Tishkov 2000).

Research generally agrees on linking *states* to political entities and a sovereign territory, whereas *nation* is considered a collectivity of people, a community that perceive themselves as members of the same group, whereby the group membership is judged by ethnic, cultural, or linguistic commonality, and the same institutional framework. In the definitions of *nation*, in addition to "objective" criteria (e.g., language, religion, and territory), there are also "subjective" ones; for example, sentiment, will, and perception (see, e.g., Smith 2014). I argue that metaphors are of outmost importance in these subjective criteria: metaphors can contribute to generating or preventing certain sentiments, and they influence will and perception.

In this article, a clear border between states, countries and nations is not important because all three largely relate to the same metaphor system.<sup>4</sup> However, *nation* is more abstract than the other two, and I argue that it therefore requires a richer metaphorical conceptualization necessary to create a national feeling, and/or convincing a community of membership in a nation. Furthermore, metaphors are needed for maintaining a community's sense of belonging to a nation and the idea of the continuous existence of the nation.

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1. Danas (news portal), 19.3.2014.
  2. Krstarica (Internet forum), 20. 12. 2010.
  3. Merriam-Webster online; nation, state, nationality, and country; Stanford Encyclopedia of Philosophy.
  4. *Država* 'state', *zemlja* 'country', and *domovina* 'homeland' are much more frequent in South Slavic discourse found online than *nacija* 'nation': compare Google search hits (July 24th, 2015) for *naša nacija* 'our nation' = 11,900, *naša zemlja* 'our country' = 371,000 (the results also include references to 'our Earth'), *naša država* 'our state' = 342,000, *naša domovina* 'our homeland' = 129,000; *naša otadžbina* 'idem' = 5,420. *Naš narod* 'our nation/people' is also very frequent (= 356,000). A discussion of the relation of *narod* - *nacija* (see, e.g., Bringa 2003) cannot be undertaken here.



Metaphors and *nations / the national* can be related to three levels of inquiry. First, there seems to be a metaphorical dimension related to the content of the term *nation* itself, although “metaphorical” may not be the ideal descriptor. Second, scholarship concerned with nations cannot avoid metaphors (which are also common in everyday communication) at the micro-level of expression, or it deliberately uses some specific metaphors (see Section 5). Scholarship operates with metaphors to explain processes and their results, such as nations coming into being and their decline. For example, metaphors motivate expressions such as the *dying out* of a nation, and *nation-destroying* or *nation-killing* in discourse about threatened nations in multinational states (see Tishkov 2000: 631). Third, certain nations or some of their aspects are imagined, conceptualized, and conceived of in metaphors.

Discussing the meanings of nationalism as an ideology, movement, and symbolic language, Smith (2014: vii, 5–6) emphasizes three<sup>5</sup> as crucial: a language and symbolism of the nation, a social and political movement on behalf of the nation, and a doctrine and/or ideology of the nation. Although acknowledging an overlap of language/discourse with the symbolism of nationalism on the one hand, and their intersection with the ideology on the other (Smith 2014: 7), Smith does not elaborate much on language and discourse. There is much to be done in this field, including systematically examining metaphors. Metaphors—interacting with symbols at various levels—are pervasive in the discourse of the nation, they provide the category of the nation with significance, and I thus claim that they are important tools of nationalism as an ideology, as well as part of the images of the nations by their members and non-members. Nations as “imagined communities” (Anderson 1991) achieve their reality with help of certain metaphors.

Nations rely on a construction of a homogeneity of culture that all people belonging to a national community share. Societies (e.g., various social actors within them) use various kinds of stories to make sense of the national communities’ past and future: the nation is always narrated and sustained through the stories told (Schwarz & West-Pavlov 2007: 179). These stories are discourses that establish, produce, and reproduce national cultures by either questioning them, or, for example, introducing new cultural patterns. The sense of a national culture discursively produced is by no means unitary: parallel and contested versions regularly coexist.

Nations are on the one hand producers of certain discourses but, on the other hand, the nation(al) itself is a product of different discourses, be they influential and related to power or less influential. Nationhood is not given: it has to be constructed in stories and narratives. These stories operate with metaphors when presenting, for instance, a nation as a person. Metaphorical expressions are part of the language of the nations and nationalism, and they are cognitive tools employed in thinking about these phenomena. Metaphors thus contribute to processes termed “nation-building” and “nation-destroying” (these terms and processes and the ideas they refer to are also based on metaphors; see Section 4). Understanding such processes, including the role and potential of metaphors,

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5. Two other meanings are: a) formation or growth of nations, and b) a sentiment or consciousness of belonging to the nation.

is of utmost importance because it can aid in understanding the causes of conflicts and attaining conflict resolution.

In what follows, I concentrate on conventional conceptual metaphors—personifications and metonymies—in everyday references to states, countries, and nations in public discourse (Section 2). Section 3 looks at personification and family metaphors, and Section 4 discusses metaphors in the discourse of nationalism scholars. Section 5 provides some concluding thoughts.<sup>6</sup>

Following the assumption that nations, the national, and metaphors all are to some extent discursive phenomena, this overview article emphasizes the understanding of metaphors in cognitive linguistics and the advantages it offers. The examples that illustrate the phenomena addressed in the following sections are from contemporary South Slavic discourse (mainly media discourse) in Bosnian/Croatian/Serbian found online in spring/summer 2015.<sup>7</sup> The individual metaphors provided here solely as an illustration certainly deserve in-depth analysis that is beyond the scope of this article.

## 2 Conventional metaphors (personifications) and metonymies in references to nations

Distancing themselves from some traditional views, especially those of rhetoricians, who consider metaphor as a language phenomenon whose prominent function is ornamental, or a poetic device, cognitive linguists approach metaphor as a cognitive tool: they claim that people think in metaphors and conceptualize reality via metaphors (see, e.g., Lakoff & Johnson 1980). Metaphors are pervasive in the cognitive system: they are situated first and foremost in people's minds, and this affects language. In cognitive linguistics, metaphors are not merely linguistic phenomena. Metaphorical expressions in language are reflections of cognitive processes. Language expressions are not conceptual metaphors; conceptual metaphors are phenomena of human understanding the world. Nonetheless, language expressions indicate the existence of certain metaphors in the conceptual system. Early cognitive metaphor theory (Lakoff and Johnson 1980) relates many conceptual metaphors (primary metaphors; e.g., MORE IS UP)<sup>8</sup> to immediate bodily experience.

Metaphorical thinking implies connecting two domains, a source and target domain, via conceptual mappings. The first domain (the source) is usually more concrete than the

6. The discourse samples were all accessed between April and August 2015.

7. Discourse found online is of course heterogeneous as to the genre (e.g., political speeches, literary texts, etc.) and register (e.g., samples found are formal and informal: the first is represented by, e.g., online (print) media, and the second by blogs and forums). The discourse samples quoted in this article are only meant as an illustration of specific metaphors, or an indicator of quantitative tendencies. Google searches provide indications of usage frequency of certain phrases (and metaphors). However, I do not use the results of these searches in any absolute sense, aware of the fact that meanings are context dependent, and that an in-depth analysis of each metaphor requires a systematic approach to the discourse type, nature of sources, context, and authors' intentions.

8. In cognitive linguistics, small capitals are a convention for indicating (conceptual) metaphors and concepts.

second one (the target). As a rule, people tend to conceptualize more abstract or less familiar concepts in terms of more concrete or familiar ones. Therefore, many source domains relate to physical reality (e.g., orientation in space, as with UP and DOWN), and target domains to less concrete and/or less tangible realms (e.g., emotions). For instance, HAPPINESS IS UP is a metaphor linking a concrete spatial domain with a less tangible domain of emotions. The basis of that metaphor is physical experience—when people are happy, their body posture and eyes are directed upwards. This is reflected in some language expressions (e.g., in English: *I'm feeling up today*; see Kövecses 2008). Recent metaphor research pays intense attention to discourse metaphors pointing to the fact that many metaphorical expressions found in discourse do not relate to immediate (bodily) experience as do many primary conceptual metaphors: instead, many metaphors are linked to specific cultural experiences, text, and discourse history (see, e.g., Zinken et al. 2007).

Concepts that need certain other domains to be conceptualized as a meaningful structure are the abstract notion of “nations” and the somewhat less abstract one of “states”: they cannot be seen and touched (setting aside the graphic representation of states on a map, but the representation itself is not the state). Using mappings from less abstract domains makes it possible to conceive of some features of nations and states.

In cognitive linguistics, metonymy is also a cognitive tool that, unlike metaphor, involves only one conceptual domain: “A metonymic mapping occurs within a single domain . . . via metonymy one can refer to one entity in a schema by referring to another entity in the same schema . . . one entity is taken as standing for one other entity in the same schema, or for the schema as a whole” (Lakoff and Turner 1989: 103).

The use of geographical names referring to countries and states is already metonymic because geographical names such as *Serbia* and *Croatia* can be thought of as metonymic designations of areas largely inhabited by Serbs and Croats. The name establishes a spatial and/or temporal link between the territory and the people living there. Furthermore, these names can be used as personifications of the Serbian and Croatian people: this most often implies certain groups of Serbs and Croats.<sup>9</sup>

In early cognitive linguistics, personification (understood in traditional rhetoric as a trope attributing features of humans to inanimate objects) was considered an ontological metaphor “where the physical object is further specified as being a person. This allows us to comprehend a wide variety of experience . . . in terms of human motivations, characteristics, and activities” (Lakoff and Johnson 1980: 33). Later (e.g., Lakoff and Turner 1989), personification was approached as a generalized conceptual metaphor, a cognitive process in which an entity or inanimate phenomenon is anthropomorphized and ascribed human qualities.

In everyday references to countries, states, and nations (be they blended or distinguished), such as: *Srbija se mora probuditi i shvatiti da neće uvijek imati Rusiju*<sup>10</sup> ‘Serbia has to wake up and understand that it will not always have Russia’, one finds expressions

9. References to a whole implying its parts are a whole-to-part metonymy (meronymic metonymy).

10. Tportal (news portal), 17.4.2013.

that reflect conceptual metaphors: Serbia is implicitly ascribed the state of being asleep (because it has to wake up) and is considered capable of understanding. Such references to nations, countries, and states as people are frequent in discourse. Cognitive linguistics relates similar examples to personifications, which are ubiquitous and pervasive conceptual metaphors.

The metaphor *THE NATION/STATE IS A PERSON* implies that nations/states are grounded in the same moral and political milieu as individual citizens. The nation can be constructed in varying realizations of the human condition that enable one to see many of its different aspects; for example, its inclusive civic conceptions and civic values, such as religious and social tolerance. Societies are inherently bounded, and the distinction between themselves and others is important. The phenomena that make up a nation and make it distinctive (e.g., its institutions and ways of life) are articulated as a person's qualities.

In discourse using personification, a country/state referred to by its name is most frequently a metonymy of a national collective because only part of that collective is responsible for a certain action: in *Hrvatska je izabrala prvu predsjednicu u povijesti*<sup>11</sup> 'Croatia elected the first female president in its history' it is only a certain percent of Croatia's citizens that *Croatia* refers to.

Nations can be personified as possessing certain mental dispositions—for example, confidence and pride—and are also attributed mental processes, such as understanding (e.g., *Srbija shvata da postoje uslovi koji treba da se ispune*<sup>12</sup> 'Serbia understands that certain conditions have to be fulfilled').

Personification also makes it possible to ascribe emotions and states to countries: a country suffers, forgives, and sings (e.g., *Srbija u Guči pati, al' peva i prašta* 'Serbia suffers in Guča, but it sings and forgives').<sup>13</sup> It possesses psychological attributes, such as willpower and confidence (see, e.g., frequent internet examples containing *Srbija/Hrvatska je odlučna...*<sup>14</sup> 'Serbia/Croatia is determined . . .'), but also physical ones (being blind or deaf), as in *oslepljena i gluva Srbija* 'a blind and deaf Serbia'.<sup>15</sup>

In language expressions that draw on this conceptual metaphor, a country is characterized as a person with certain characteristics that define the national character in a particular situation. A personified nation exists and acts in different ways. It thinks and says different things. This metaphor is used in media discourse, but also, for instance, in manifestos of political parties, which are another realm of political discourse. Aims underlying the uses of this metaphor in different discourse types are different. In political manifestos, well-defined temporary political aims can motivate (some) uses of this metaphor. It can function as the main (or be among the main) nationalist metaphors of the nation. In different discourse samples, a nation can speak with different, even conflicting, voices.

11. N1 (news portal), 11.1.2015.

12. Radio-televizija Srbije (TV news), 7.10.2011.

13. N1 (news portal), 24.4.2015; Politika online (newspaper), 6.8.2013c.

14. E.g., Politika online (newspaper), 14.6.2013b.

15. Feral (newspaper), 7.5.2008; Danas (newspaper), 27.6.2012.

This metaphor makes it possible to construct a nation as multicultural and democratic, but also as regressive and atavistic.<sup>16</sup>

What is the role of conceptual metaphor, particularly personification, and metonymy in discourses of the nation(al)? I refrain from claiming that it necessarily *does* something, but I claim that it is able to produce various effects. The role of these tools in discourse is dependent on the discourse type, the discourse participants, and the immediate and broader discourse context.

Personification that makes it possible to conceive of a country, state, and nation as a personified individual relates to emotions. People develop much stronger emotions—be they positive or negative—towards individuals than towards objects. Personification is a helpful cognitive tool because it enables almost “direct emotional access” to otherwise abstract or diffuse entities. With its aid, discourse participants (including recipients) more easily become emotionally attached to nations, and it is precisely this attachment that creates a nation’s reality. Nations become very “real” when someone decides to defend them or die for them.

Personification and metonymy in discourse go hand in hand. At different levels of discourse, metonymy contributes to generalizing. As a consequence, for instance, one holds a generalized whole responsible (blame or credit) for actions for which only some of its parts are responsible. Metonymy in discourse thus can hide the true responsibility for some actions, as in the article headline “Srbija ne poštuje verske slobode” ‘Serbia does not respect freedom of religion’.<sup>17</sup> In the broader context, one learns that freedom of religion is not sufficiently respected in some Serbian communities in cases of discrimination because of religious beliefs, and also that the government subsidizes the wages of Serbian Orthodox priests abroad, and that non-registered religious communities face some practical problems. These details, however, are not enough to conclude that Serbia as a state does not respect freedom of religion. Thus, through metonymic references, similar titles imply responsibility of a whole (an entire state with its institutions) and blur real responsibilities of the parts of that whole.

### 3 From persons to families: family metaphors and gender

In addition to the anthropomorphized general images of nations, states, and countries discussed, one encounters some more specific metaphors that elaborate in greater or lesser detail the relation of states and their citizens, and nations and their members. Metaphors related to family play an important role in discourse of the nation(al): this can be anticipated because the noun *nation* is etymologically related to Latin *natio* ‘birth’ which already implies a family scenario. Humans belong to larger social groups, and a fundamental social group in society is a family, typically consisting of one or two parents

16. Although the conventionalized metaphor THE NATION IS A PERSON can often be found in political discourse, some researchers challenge the cognitive linguistic view on its pervasiveness and ubiquity (see, e.g., Twardzisz 2013).

17. b92 (news portal), 30.7.2012.

and their children. That source domain provides the target domains with elements and mappings that help create the nation's structure. In the general metaphor THE NATION IS A PERSON, the person is commonly specified as a mother. *Mother*, a relational noun, implies the existence of children—daughters and sons—who are members of the metaphorically conceptualized nation. Furthermore, the metaphor implies certain relations (e.g., biological and emotional). *Country* and *state* are linked to territory, space, and political institutions, whereas *nation* is a more vague and diffuse concept: *mother* is thus a powerful metaphor that plays an important role in imagining the nation, in the sense that it provides the nation with strong emotions (related to belonging, care, non-conditioned love, etc.). This metaphor appeals to the experience and feelings of each individual because each has an experience of having a mother and being a child, which relates to specific experiences with family relations within a nuclear and potentially broader family, be they positive or negative.

For instance, the expression *majka Srbija* 'mother Serbia'<sup>18</sup> is occasionally found in discourse by political actors, soccer fans, and so on, and reflects the conceptualization of Serbia as a mother whose inhabitants are her children. The expression is based on a conceptual metaphor that implies a set of mappings in which attributes, states, and actions pertaining to a mother are mapped onto Serbia. An examination of frequencies of similar references to different South Slavic countries by contrasting different discourse types and usage types (e.g., ironic) can reveal the emotional attitudes of certain groups of discourse participants to their respective countries.

Concrete discourse samples do not necessarily extensively explain the details of individual mappings from the source domain into the target domain: for instance, a discourse sample can operate with the metaphor concentrating on the mother only with no extensive references to children. However, certain elaborations of the family metaphor can be found in discourse. These are dependent on the discourse subtype, and some even seem conventional. For instance, in the article "Vulin: Sinovi Srbije nikada više u rat" (Vulin: Sons of Serbia Never Again into War), sons are explicitly mentioned a few times.<sup>19</sup> *Sinovi*, however, seldom refers to all of the members of a nation: it is a conventional reference to soldiers and warriors restricted to specific discourse types (often by state officials) in South Slavic discourse. *Sinovi Hrvatske* 'Sons of Croatia' is mainly used in contexts with references to the wars of the 1990s in Croatian discourse.<sup>20</sup> Occasionally (and much less frequently) the expression *sinovi i kćeri Hrvatske* 'Sons and daughters of Croatia' is used.<sup>21</sup> (I address gendered aspects of the family and mother metaphor in the discourse of the nation below).

18. Analitika (news portal), 28.1.2014. Politika online (newspaper), 17.5.2013a.

Google search, July 24<sup>th</sup>, 2014 for *majka Srbija*: 46,800 hits. To compare: *majka Crna Gora* 'Mother Montenegro' = 624; *majka Hrvatska* 'Mother Croatia' = 9,020; *majka Bosna* 'Mother Bosnia' = 8,190, *Majka Bosna i Hercegovina* 'Mother Bosnia and Herzegovina' = 33 hits.

19. Radio-televizija Srbije (TV news), 12.7.2014.

20. See. e.g., *Zadarski list* (newspaper), 25.1.2010.

21. The same applies to Serbian contexts, in which a few attestations of *kćeri Srbije* were found (Google Searches, May 10<sup>th</sup>, 2015; July 27<sup>th</sup>, 2015).

THE NATION IS A MOTHER is a specific variant of the general metaphor THE NATION IS A PERSON. That metaphor's source domain relates to scenarios with children as necessary elements in some discourse subtypes, but also to fathers and stepmothers in some others.

Alongside the metaphor THE NATION IS A MOTHER, the metaphor THE NATION IS A STEPMOTHER was frequently noticed in the discourse samples examined: (a) *Do kada će Hrvatska nekima biti majka, a većini maćeha?*<sup>22</sup> 'How long will Croatia be a mother to some, and a stepmother to the majority?' (b) *Kad je država deci maćeha?*<sup>23</sup> 'When the state is a stepmother to its children', and (c) *Babo im majka, Bosna maćeha?*<sup>24</sup> 'Babo is their mother, Bosnia their stepmother'. In some examples, the stepmother metaphor is elaborated by some other elements from the source domain (e.g., children in (b)). In the scenarios employing *majka* and *maćeha*, the contrast between the two is emphasized (see (a)). As (c) shows, *majka* can be a male (*Babo* 'dad' is a politician's nickname), whereas the country/state is the stepmother.

Another element from the source domain productively mapped on the target domain is the stepchild (*pastorak, pastorče*): persons lacking certain rights or care, or groups discriminated against (e.g., disabled persons, refugees, and writers) are occasionally labeled *pastorčad* 'stepchildren'.<sup>25</sup> The contexts examined with the keywords *maćeha* and *država* in the same immediate context show that the "stepchildren" of the state (the stepmother) may be institutions, administrative units, individuals (e.g., athletes, etc.) or groups of related individuals. The metaphor's function in these contexts is a critical evaluation of their positions in a society.

Similar discourse spreads negative stereotypes and myths about stepmothers, and positive stereotypes about mothers in juxtaposing (biological) mothers and stepmothers. Representations of unequal treatment and injustices towards some citizens in these discourse samples are related to family scenarios as source domains in which stepmothers treat children unequally. Juxtaposing mothers and stepmothers is led by the "nuclear family ideology," implying that the biological, intact family with two biological parents and their children is the "ideal" family type (Coontz 1992). Stereotyping is particularly prominent in the contexts in which the opposition *majka* – *maćeha* is emphasized by the diminutive *majčica* and attributes specifying the mother as *brizna* 'caring' and *nježna* 'gentle' and the stepmother as *sve zločestija* 'increasingly evil' (e.g., *socijalna država Hrvatska svojim je građanima sve zločestija maćeha, a političkoj eliti brižna i nježna majčica* 'the welfare state of Croatia is an increasingly evil stepmother to its citizens, and a caring, gentle mother to its political elite').<sup>26</sup> Stereotyping is, however, not a phenomenon limited to South Slavic media and political discourse: recent research demonstrates that many people in different countries (e.g., Australia; see Planitz & Feeney 2009) view stepfamilies in an oversimplified way.

22. Glas Brotnja (news portal), 15.7.2013; Politika online (newspaper), 4.2.2010a.

23. Opozicionar (Internet portal), 5.3.2015.

24. Slobodna Dalmacija (newspaper), 3.10.2009.

25. Politika online (newspaper), 6.2.2010b; Klix (news portal), 19.12.2008.

26. Poslovni dnevnik (newspaper), 25.4.2010.

The scenarios mentioned do not regularly include the other parent from the family source domain, the father. However, fathers do occur in some other discourse types: “father of the nation” is the title given to certain persons in official state discourse (e.g., in their internet presentations<sup>27</sup> and in constitutions;<sup>28</sup> the term is even listed in dictionaries<sup>29</sup>).

Considering a person a “father of the nation” or “founding father” is another instance of mapping family relations onto the political realm of nations. Men referred to by these expressions are those assumed to play an important role in establishing an independent country, setting up the political system, or writing a constitution. This metaphorical title is given, for instance, to Nelson Mandela.<sup>30</sup> Two politicians that frequently bear this title in Croatian discourse are Ante Starčević (1823–1896) and Franjo Tuđman (1922–1999), the first a politician and writer whose works are considered to have laid the foundations for Croatian nationalism,<sup>31</sup> and the second a politician and historian that became Croatia’s first president after its independence from Yugoslavia.

“Founding mother” is not frequently used, but it occasionally appears in public discourse discussing the role of (among other things) women that supported the “founding fathers.” In South Slavic discourse, an equivalent expression (*majka nacije*) frequently refers to folk singers.<sup>32</sup> This metaphor and its scope deserve a separate comparative analysis.

Some other terms also indicate the importance of family imagery in conceptualizing nations; for example, references to a language as a mother tongue. Family relations are also implied in the etymology of words that inhabitants of a country use for that country (e.g., *fatherland*, *motherland*, and their equivalents, such as Serbian *otadžbina*).

Language users employ the mother metaphor in specific contexts and with specific purposes: used by politicians, it can be part of attempts to convince and mobilize an audience (e.g., *Hrvatska je država i ona je majka svih svojih građana, ne gospodarica, nego majka u pozitivnom smislu riječi, kojim god oni pismom pisali i koje god nacije bili . . .*<sup>33</sup> ‘Croatia is a state and a mother to all its citizens, not a taskmistress, a mother in the positive sense, no matter which script they use and their nationality . . .’). The coexistence of phrases such as *majka domovina* ‘mother homeland’ and *sinovi, kćeri* ‘sons, daughters’ in the discourse of church officials aims to evoke emotions in the audience and motivate them to future action.

Although this overview cannot delve into the issues of gender and nationalism in detail, a few remarks are in order. Research on gender and nationalism (see, e.g., Eisenstein 2000) has argued that a nation always has “a” gender that is observable in the symbolization and verbalization of the nation. The nation is gendered in expressions with meanings such

27. E.g., information about Bangladesh at its embassy’s page: Embassy of Bangladesh in Washington, DC.

28. E.g., the constitution of Nepal (1959).

29. Merriam Webster online; Macmillan Dictionary online.

30. Independent (newspaper), 6.12.2013.

31. Starčević as “father of the nation” was a subject to de-metaphorization in satirical news discourse. See News-bar (fake news portal), 2015.

32. E.g., Vesti online (news portal), 31.12.2013.

33. 24 sata (news portal), 5.9.2013.



as 'mother homeland', which unambiguously portray the nation as a woman and in which imagined females represent nations. Women metaphorically representing nations are reproducers, nurturers, and caregivers. In their metaphorical/symbolic motherhood, they are the mothers of all children of the nation. The metaphor *THE NATION IS A WOMAN* conceals and reveals, as metaphors always do: it highlights some aspects of womanhood, and it hides some others. Petersen (2000: 70) claims that nationalism reduces women to their motherhood. Indeed, imagining a nation/country as a "female child, a lesbian, a prostitute, or a post-menopausal wise woman generates quite different pictures, which enable quite different understandings of community" (Petersen 2000: 70). However, alternative imaginings are not common in the language of nations and nationalism, although they do occur (at least as possibilities) in informal discourse.<sup>34</sup>

The widespread conceptualization of nations as women is not free of paradoxes: women can have a central place in imagining the nation, but this does not erase the contradiction of exclusion of women from political spheres (see, e.g., Baron 2005 on Egypt).

The metaphor *THE NATION IS A WOMAN* enables further inferences: the motherland is a woman's body and as such in potential danger of violation by foreign males. Defending a person's honor is mapped onto defending a nation's boundaries against invasion and violation, which requires sacrifice of countless citizens, or warriors (see Petersen 2000: 69; Elshtain 1992). The rape of a body is metaphorically mapped onto invasion and violation of a nation. Rape relies on and reproduces the rigid male-female binary; it is a warring strategy, but also a metaphor of national or state humiliation (Pettman 1996: 49; Peterson 2000).

Research shows how certain nations are "feminized" through metaphors of rape and sodomy in times of conflict (see, e.g., Puri 2008: 137): for example, in the discourse by the Bush administration, gendered and sexualized metaphors were used in which Saddam Hussein embodied criminal and out-of-control masculinity in relation to the Kuwaiti nation. The metaphor of rape occasionally occurs outside conflict situations, and outside discourses thematizing foreign invasion: in Croatian and Serbian discourse, it is used with hyperbolic connotations implying misuse and mishandling of countries not only from the outside, but also from the inside, implying a kind of domestic violence.<sup>35</sup>

#### 4 Metaphors in scholarship on nations and nationalism

The metaphor *THE NATION IS A WOMAN* and the cluster of metaphors related to it (i.e., kinship metaphors) are a feature not only of the public discourse on "nations," but also of the rhetoric of national movements and scholarship dealing with nations and nationalisms. Metaphors are key tools for developing a specific view in scholarly reasoning about what nations are, and they are among the key tools in the mobilizing discourse of national movements. In national movements, nationalists legitimize their political aspirations and

34. b92 (blog), 30.11.2006.

35. E.g., *silovanje domovine* 'rape of the homeland': Politika (news portal), 15.1.2011; *silovanje Srbije* 'rape of Serbia': Online media press (news portal), 6.5.2009.

activities by using the general metaphor of “reawakening”—that is, the metaphor A (FUTURE/POTENTIAL) NATION IS A SLEEPING INDIVIDUAL—while persuading a population that may not have even entertained the idea that they were members of a particular, designated nation (Smith 1998: 147).

Research on nationalism as ideology (e.g., Smith 2014) identifies the metaphors of family and kinship as central to nationalism because, in a nationalistic understanding, the nation draws its boundaries through myths of common ancestry and becomes a “superfamily,” whereby those presently included in the nation are conceived of as brothers and sisters. The family metaphor is thus one of nationalism’s key metaphors. It potentially evokes strong emotions, and intertextually links different domains of public discourse (in which the general public, politicians, and others talk about the nation) with the discourse of nationalism as ideology. Smith (1998: 224) emphasizes that familial metaphors are of great importance in the perennialist approach to nations, which tends to derive modern nations from fundamental ethnic ties, emphasizing in addition the functions of language, as well as myths of origin.

In conceiving of nations and discussing nations and nationalism in research, some strands of discussion operate with some major metaphors. How they use metaphors (or not) thus differentiates scholarly (philosophical, sociological, anthropological, and other) approaches to nations from one another.

The essentialist view, led by the idea that the nation is a divine or natural phenomenon, dominated early understandings of the nation. Whereas the divine view—which is represented by Friedrich Schleiermacher (1768–1834) and is an extension of the divine discourse on which medieval monarchy was based—understands the nation as endowed by God, the natural theory (represented by Herder, 1744–1803) conceives of a nation as an organic unit: each branch of its culture is an organic part of a larger unit. This “organicist” discourse is framed by the metaphor THE NATION IS A LIVING ORGANISM (A PLANT / AN ANIMAL), which implies that the natural biological processes of birth, growth, maturity, and decay apply to nations as they apply to living organisms. This view emphasizes ties of blood. In his “sociobiological” view (see Guibernau 2013), Herder combines the organicist metaphor of the nation as a living organism with the metaphor THE NATION IS A FAMILY: “A nation is as natural as a plant, as a family, only with more branches” (Herder, in Guibernau 2013). The nationalist ideology following “organicist metaphors” assumes that “the pattern of life in a society is similar to that of a biological organism” (Berlin 1979: 341), and that the needs of this “organism” determine the supreme goal for all of its members.

The relativist or constructivist view conceives of the nation as a product dependent on and relative to its context and historical circumstances. The nation is a social, cultural, and political construct. This view does not rely on a single metaphor the way the sociobiological view does. Although Benedict Anderson’s (1991) definition of nations does not rely on a specific metaphor, his concept reveals metaphorical thinking and raises some questions: he concentrates on the nation as a social construction defining it as “an imagined political community . . . imagined as both inherently limited and sovereign” Anderson (6 : 1991). His definition utilizes the CONTAINER conceptual metaphor because the nation is imagined as “inherently limited”: conceiving of a nation necessarily implies difference; that is, borders

between that nation and its Others. Anderson (1991: 7) claims that “the nation is always conceived as a deep, horizontal comradeship. Ultimately it is this fraternity that makes it possible over the past two centuries, for so many millions of people, not so much to kill, as willingly to die for such limited imaginings.” Anderson’s ideas raised an important question asked by gender and nationalism scholars (see, e.g., Racioppi and O’Sullivan 2000): How can women belong to the national community if the “nation” is imagined as a “deep, horizontal comradeship,” a “fraternity” ready to die for?

Some other modern theories about the origin and authenticity of ethno-cultural groups or ethno-nations do not develop their views using any “major metaphors.” However, their views are occasionally interpreted in metaphors by others. One of these is the “primordialist” view, according to which actual ethno-cultural nations existed for a long time during the pre-modern period (Hastings 1997): a popular version of this view is represented by Anthony Smith’s (e.g., 2009) “ethn-symbolism.” Özkirimli (2003) summarizes the ethn-symbolist views with the metaphor *NATIONS ARE ARTICHOKEs*, which goes back to Hoffmann (1966), who discussed the fate of the nation-state in the context of moves towards European integration. Artichokes provide an interesting source domain for nations: they have many layers of leaves and a middle part, a “heart” (which is itself a metaphor). Mapped onto the target domain, this implies that nations have many layers, or less important components (corresponding to leaves). These can be destroyed or abandoned (which corresponds to being “eaten” in the source domain) one by one. However, after these layers have been abandoned (been eaten), the essence of the nation (its heart) remains. The heart of the nation in the ethn-symbolist view, claims Özkirimli (2003), is the persistence and embeddedness of “the myths, symbols and memories.”

One of the widely used metaphors in discussing nations is nation-building. Nation-building is also a theoretical approach and a leading assumption of some modern nationalism theories. As Kolstø (2000) insightfully observes, the architectural metaphor of “nation-building” implies consciously acting agents such as architects and engineers. The expression relies on the metaphor *NATIONS ARE BUILDINGS*, in which the abstract domain of the nation is related to architecture. Cognitive linguistics has identified many abstract domains that are structured in terms of buildings and houses as concrete domains (see Lakoff & Johnson 1980 on the metaphors *IDEAS ARE BUILDINGS*, *ARGUMENTS ARE BUILDINGS*). In nation-building, the key elements of the source domain are “builders” mapped onto the active agents in the target domain. These agents are, for example, state leaders applying planned strategies in their result-oriented actions (aimed at, e.g., popularizing new state symbols). Other “builders” may be TV personalities and writers. Kolstø (2000) emphasizes that nation-building<sup>36</sup> also covers unplanned social change—that aspect of the target domain does not have a corresponding element in the source domain.

Metaphors are not only present at macro-levels of the nation and nationalism theories; they are also pervasive at the micro-level of scholarly discourse. A few phrases from a

36. Interestingly, the same process is labeled “nation-destroying” (see Connor 1972) because many states contain a number of nations and because their successful integration means transferring primary allegiance from these nations to the state.

book dealing with the former Soviet Union (Strayer 1998) already indicate a few conceptual metaphors: “the subsequent emergence of fifteen new independent nations from the ashes of the Soviet Union” (p. 71), *Cracks in the foundation* (chapter title), and “‘imagined communities’—nations with allegedly deep historical roots” (p. 72). These metaphors are: STATE DISSOLUTION IS FIRE, STATE FORMATIONS ARE BUILDINGS, and NATIONS ARE PLANTS.

## 5 Discussion and concluding remarks

Studying nations and nationalism and performing nations in everyday life relates to employing metaphorical thinking and using metaphorical expressions, two processes that do not necessarily go together. In some situations, metaphorical expressions are carefully chosen as tools in discussing an object of inquiry (across different discourses); in some other situations, conceptual metaphors are a natural way to think about an object, which is reflected in certain metaphorical expressions (at a discourse’s micro-level). These two dimensions seem to at least partly reflect the distinction between *deliberate* metaphors in discourse on the one hand and conceptual metaphors on the other. In discourse analysis, it is crucial to distinguish conventional metaphors (common ways of expressing things) from non-conventional ones, which are produced intentionally to achieve some specific goals (e.g., the family metaphor already discussed). Research on discourse metaphors (e.g., Zinken et al. 2007) emphasizes the specific nature of metaphorical expressions in discourse that do not seem to relate to primary conceptual metaphors based on immediate bodily experience, but instead rely on knowledge of culture, natural or social phenomena, and discourse history. A subtype of discourse metaphors is deliberate metaphors: these are specific metaphors used in various nation-building (or nation-destroying) projects, chosen by social actors led by specific aims that can be difficult to provide unambiguous evidence for.

Some deliberate metaphors are, for example, used to refer to particular nations across different discourses in order to generate positive or negative images of these nations in their population: these images can influence emotions and direct actions. Such metaphors include, for example, *Rainbow Nation* (applied to post-apartheid South Africa; see Bornman 2006) and *tamnica naroda* ‘prison of nations’. Whereas *Rainbow Nation* has positive connotations and in its cultural context plays a unifying role along with the most important national symbols (the flag and anthem; see Bornman 2006), the metaphor *prison of nations*<sup>37</sup> (used in very different contexts all over the world) carries a negative meaning suggesting oppression and lack of freedom of the “imprisoned.”

People use metaphors deliberately as part of certain strategies of nation-building and nation-destroying. Politicians, for example, use the metaphor THE NATION IS A BUILDING when positioning themselves and delineating their role and actions in concrete situations.

Metonymy and personification are pervasive in the discourse of the national. These conceptual metaphors in that discourse can be considered instances of banal and “everyday nationalism” (see, e.g., Billig 2006; Fox and Miller-Idriss 2008): they take part in

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37. For a detailed study of this metaphor in South Slavic discourse, see Šarić (in preparation).

performing nationalism. Metaphors are a regular part of larger scenarios (e.g., commemorations of a glorious past) of performing nations and nationhood. These scenarios are related to mass displays of emotions, and metaphors are important devices in arousing emotions.

Metaphors may be part of people's way of thinking about the world, especially abstract entities, and one may consider them natural. One should not, however, forget that metaphors always "direct" a certain way of thinking and exclude others. Eubanks (2000) emphasizes that metaphors are adopted as part of "discursive strategies." Conceptual metaphors are frameworks of thought adapted to the needs of language users' arguments in a concrete situation. Metaphors are invoked and harnessed to fit specific purposes of language (and metaphor) users.<sup>38</sup>

In recent decades, greater attention has been paid to the subjective dimensions of collective identities, such as discourse, memory, symbols, and myth, in studies focusing on (national) identity construction. Metaphor is either an integral part of, or interacts with, all of these dimensions, and investigating metaphor thus expands the understanding of collective identity.

Nations, no matter whether they are considered imagined or real communities, are subject to their members' feelings. The same is true for the related entities: states, countries, and homelands. Among the main means that establish and destroy the emotional attachment and sense of belonging of their members to these communities are symbols, myths, and metaphors. National communities, as Smith (1998: 138) argues, purvey narratives vital to their survival and renewal. Because metaphors are parts of these narratives, and they interact with symbols and myths, they play an essential role in national discourses (e.g., value and memory discourse).

Metaphors first and foremost play a role in giving emotional content to the nation (and in making it an entity worth dying for). They also contribute to portraying and representing the significance and distinctiveness of the nation: Smith (1998: 92) mentions imagery and representation (of which metaphors are an inherent part) as "the directive guidance that the specific ideal of the nation furnishes." As argued by Mach (1993), symbols arouse emotions and direct actions. The same applies to metaphors: it becomes apparent how much they matter when, for example, they start directing destructive actions.

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38. Goatly (2007) and Underhill (2011) point to a close (and sometimes dangerous) link between metaphors and ideology.

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**ČLANKI**  
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## SLOVENIJA: DVA DRUŽBENA SISTEMA V SPREMENLJIVI KOLEKTIVNI ZAVESTI

### IZVLEČEK

V Sloveniji je vzpostavitev samostojne države pomenila tudi zamenjavo družbenega sistema socializma s kapitalizmom. V članku je predstavljeno spreminjanje vrednotenja teh dveh sistemov na podlagi podatkov longitudinalnega raziskovanja slovenskega javnega mnenja (od 1990 do 2013). V analizi so upoštevane splošne ocene o a) socialističnem obdobju nasploh in po časovnem zaporedju, b) kakovosti življenja pred osamosvojitvijo in v samostojni državi, c) odnosu do pojmov Evropa, socializem in kapitalizem, ki jih dopolnjujejo stališča respondentov o tem, kako izbrani štirje pojmi (pravičnost, človečnost, neenakost, blagostanje) ustrezajo njihovim predstavam o enem ali drugem sistemu.

KLJUČNE BESEDE: antikomunizem, demokracija, kapitalizem, neenakost, socializem.

### Slovenia: two social systems in a changing collective consciousness

#### ABSTRACT

In Slovenia, the shaping of an autonomous state also meant replacing the socialist system with a capitalist one. The article presents the Slovenian population's changing evaluation of these two systems based on data collected through the Slovenian public opinion survey from 1990 to 2013. The analysis considers general assessments regarding: a) the socialist period in general and by time sequences; b) the quality of life before and after establishing the independent state; c) the relationship to the notions of Europe, socialism and capitalism, which are complemented by the respondents' statements on how four selected notions (justice, humanity, inequality and well-being) correspond to their images in both systems.

KEY WORDS: anticommunism, democracy, capitalism, inequality, socialism

## 1 Uvod

Družbeni razvoj Slovenije po drugi svetovni vojni zaznamujeta dva sistema in dve obliki državne urejenosti, ki ju časovno zamejujeta leti 1945 in 1991. V prvem, socialističnem obdobju se je Slovenija kot republika razvijala v okviru federativne jugoslovanske

države, po državni osamosvojitvi pa je vodilo razvoja postal kapitalistični sistem. Ob tej preobrazbi družbenega reda je treba poudariti, da je več stoletij delujoči kapitalizem potisnil z zgodovinskega prizorišča socializem, ki se je razvijal komaj nekaj desetletij. Oznaki kapitalizem in socializem upoštevamo kot krovna pojma za zgodovinsko (globalno) raznolike pojavne oblike, ki ju razlikuje sprejemanje (kapitalizem) ali zavračanje (socializem) dobička kot ključne vrednote pri ustvarjanju eksistencialno nujnih dobrin (v tržnem gospodarstvu) ter odnos do družbene neenakosti.

Pomemben teoretični navezni okvir pri pojasnjevanju sprememb v slovenski družbi pomeni upoštevanje raznolikosti socialističnih sistemov v praksi. V tem smislu ni sprejemljivo enačenje vseh oblik socializma v »vzhodni Evropi« in tudi ne vključevanje slovenskega socialističnega razvoja v to vrsto, temveč je treba upoštevati nekatere posebnosti. Glede na začetno stopnjo razvoja nekapitalističnega sistema tudi ni ustrezno njegovo označevanje s »komunizmom« (kar naj bi bila oznaka za razviti socializem).

O socializmu v Sloveniji lahko govorimo kot o zgodnjem socializmu, saj se je razvijal manj kot pol stoletja, od 1945 do 1991. Začetno revolucionarno odpravljanje kapitalističnega ekonomskega reda se je nadaljevalo s postopnim uveljavljanjem socialistične urejenosti na temelju družbene lastnine (Nečak in Repe 2003: 254–283); z uvedbo samoupravljanja (1950) naj bi se na vseh ravneh družbenega delovanja ustvarjale razmere za zmanjševanje družbene, razredne in spolne neenakosti. V prvem desetletju je bilo veliko skupnega z drugimi socialističnimi državami, vendar se je sistem v Sloveniji predvsem v sedemdesetih in osemdesetih letih 20. stoletja vedno bolj oddaljeval od grobega centralističnega urejanja vsakdanjega življenja v nekaterih drugih socialističnih državah, ki je izključevalo individualno iniciativo in napore. Poudariti je treba, da se slovenski model urejanja medčloveških odnosov ni zagotavljal enostransko le s strani države, temveč da so se v to urejanje vključevale množice ljudi (državljanov), ki so s samoprispevki pravzaprav pomnožili državno dodeljena finančna sredstva in s tem omogočili izgradnjo močne institucionalne podlage (npr. vrtci, šole, domovi za starejše, zdravstveni domovi, kulturni in športni centri) za sorazmerno kakovostno življenje. Tudi s tem delovanjem, ki je bilo vključujoče za vse prebivalce, so se oblikovale zasnove »demokracije od spodaj«. K temu so prispevali še redni zbori volivcev in občanov, prenašanje odločanja o neposrednih potrebah prebivalcev na krajevne skupnosti itd. Skratka, v praksi je nastajala demokracija od spodaj, ki »ni omejena zgolj na sfero politike /.../, pač pa nujno vključuje celotno družbeno in ekonomsko življenje« (Vodovnik 2014).

Za slovensko družbo je bilo značilno, da se je v praksi zelo približala socialnodemokratskemu tipu zagotavljanja družbene blaginje, kar so potrjevali npr. podatki Svetovne banke o dohodkovni razdelitvi (Dragoš in Leskošek 2003: 29)<sup>1</sup> in tudi nekateri drugi kazalci, npr. o zmanjševanju družbene neenakosti spolov (Jogan 2004: 367–374). Modernizacijski procesi so z ustreznimi reformami potekali zlasti od šestdesetih let naprej do

1. V šestdesetih in sedemdesetih letih je zgornja desetina najbogatejših gospodinjstev na Švedskem razpolagala z 21,3 % dohodkov vseh gospodinjstev, na Norveškem z 22,2 %, v Jugoslaviji pa z 22,5 %. Drugačen je podatek za ZDA – 26,6 %.

politične krize v osemdesetih,<sup>2</sup> ko so se pojavljala in krepila različna družbena gibanja, ki so se zavzemala za hitrejšo demokratizacijo družbe (Vodovnik 2014). (Brezobzirna) kritika vsega obstoječega se je vsebinsko navdihovala pri nasprotujočih si tipih družbenega reda in tako vključevala bodisi (demokratizirano) socialistično perspektivo bodisi »moderno« perspektivo »razvitih demokratičnih družb«, pri čemer se njihova bistvena značilnost (kapitalistični sistem) javno ni omenjala. Zadnja struja je ost kritike, ki naj bi bila čista, neideološka in znanstvena, usmerila predvsem v »totalitarizem«, »stalinizem« oziroma marksizem, ne pa v razkrivanje sodobnega kapitalizma (Kirn 1984).<sup>3</sup> V totalitarizem je bila brez ostanka uvrščena tudi slovenska socialistična praksa, ki je bila v primerjavi z drugimi socialističnimi sistemi v praksi razmeroma svobodna in razmeroma pravična samoupravna ureditev (Rus in Toš 2005: 24).

Za navzven zelo prepričljivimi cilji izločitve iz skupne države Socialistične federativne republike Jugoslavije (zaradi naraščajočih mednacionalnih konfliktov) in državne osamosvojitve, ki so se krepili v drugi polovici osemdesetih, so bili – širši javnosti manj znani – cilji spremembe celotnega družbenega sistema. Ta cilj je eksplicitno zagovarjala leta 1989 ustanovljena koalicija Demokratična opozicija Slovenije (Demos), ki se je v programu zavzela za tržno gospodarstvo in takšno suvereno državo, »samostojno ali v konfederaciji z drugimi državami, ki ne bo temeljila na utopičnem projektu socializma« (Čepič 2005a: 1285). Ta cilj pa je bil dosegljiv le ob odpravi obstoječega »totalitarizma« oziroma »komunizma« in vladajočega enostrankarskega sistema z vodilno Zvezo komunistov; z uresničitvijo tega cilja naj bi se slovenska družba spet »normalizirala«. Socializem je bil pri Demosu dojet kot patološki pojav, ki bi ga bilo treba (kot vse bolezni) takoj in v celoti odpraviti.<sup>4</sup>

Kritično presojanje socializma je potekalo po znanem vzorcu »sestavljene sprevernjenosti« z dvakratno dehistorizacijo (Jogan 2000: 14): navezne aktualne družbe vzornice so očiščene negativnih strukturnih učinkov, slovenska socialistična družba pa je očiščena razlikovalnih pozitivnih lastnosti v odnosu do realsocialističnih družb; za zgodovinsko primerjavo znotraj slovenske družbe pa je priročna dvostopenjska delitev na socialistično (z izključitvijo pozitivnih pridobitev) in predsocijalistično preteklost (z izključitvijo negativnih značilnosti). Glavnina kritične usmeritve se je tako lahko skrčila predvsem na formo oblasti, vsebinska presoja vsestranskih posledic tržne ekonomije delovanja svobodnega trga dela (zlasti naraščanje neenakosti in revščine) pa je ostajala ob strani. Prikrito je ostajalo zlasti to, na kar so kasneje, ob ocenah zloma komunizma, opozorili nekateri zgodovinarji, namreč, da »resnični zmagovalec v letu 1989 ni bila demokracija, ampak kapitalizem« (Mazower 2002: 389).

2. Z vprašanjem krize so se intenzivno ukvarjali tudi slovenski sociologi, npr. na strokovnem posvetu z naslovom Integracijski in dezintegracijski procesi v jugoslovanski družbi, ki je potekal leta 1982 v Mariboru (zbornik z enakim naslovom, 1983).
3. A. Kirn je takšen pristop podrobno analiziral in ga argumentirano zavrnil na primeru enega od ključnih sodelavcev (Nove revije, ki je bila od začetka žarišče kritičnega diskurza) in kasnejših avtorjev ustave RS, T. Hribarja.
4. Že pred zmago Demosa na volitvah je bilo opravljeno simbolno očiščenje: 7. marca 1990 je bil v takratni republiški skupščini z ustavnimi amandmaji odpravljen naziv »socialistična« in ostala je le »Republika Slovenija«.

Podlaga za radikalni prelom s socializmom je bila v Sloveniji dana z rezultati prvih večstrankarskih volitev leta 1990,<sup>5</sup> institucionalni temelji za vzpostavitev kapitalizma pa so bili izoblikovani kmalu po razglasitvi samostojne države (1991). Ključnega pomena za vzpostavitev novega, kapitalističnega ekonomskega reda je Zakon o denacionalizaciji (sprejet novembra 1991, URL 27/91-I),<sup>6</sup> ki mu je novembra 1992 sledil Zakon o lastninskem preoblikovanju podjetij. Osamosvojitve se je pokazala kot kratkotrajno »prijateljsko sporazumevanje« (Vodovnik 2014: 425), kajti »tržni kapitalizem je poglobil socialni partikularizem. Dobili smo državo, izgubili pa družbeno substanco« (Kovač 31 :2015). Z denacionalizacijo se je v Sloveniji pojavil »povsem nov sloj bogatašev, ki so to postali zaradi rojstva (v družinah razlaščencev), ne pa z lastnim delom«; posledica denacionalizacije pa je bilo že v prvem desetletju skokovito povečanje dohodkovnih neenakosti<sup>7</sup> (Dragoš in Leskošek 2003: 37).

Zamenjava socialističnega družbenega sistema s kapitalističnim je prispevala k oblikovanju takšne družbe, »ki ni samo manj pravična, ampak tudi (vsaj na ravni organizacijske demokracije) tudi manj svobodna«, kot sta po prvem desetletju utemeljeno sklepala Rus in Toš (2005: 24). Čeprav je bila v devetdesetih letih v Sloveniji dosežena hitra rast kakovosti življenja celotnega prebivalstva, »so jo na žalost spremljali znaki asocijalne diferenciacije slovenske družbe. /.../ Prav ta paradoks pa je ena od pglavlitnih nevarnosti prihodnjega razvoja slovenske družbe, saj je prav splošna rast kakovosti življenja ugodna priložnost za nebolečo izenačevalno politiko« (Rus in Toš 2005: 28). Razvoj v drugem desetletju in zlasti z nastopom krize je še povečal družbeno neenakost, »liberaliziranje« tržnega gospodarstva pa se je sprevrglo v »absurdno privatiziranje, bolj fevdalno kakor kapitalistično« (Drenovec 2013: 211). »Zdi se, da slovenski državi blaginje do zdaj ni uspelo zaščititi pred socialno marginalizacijo tistih, ki bi jih morala, je pa zaščitila tiste, ki bi sicer lahko poskrbeli sami zase« (Rus in Toš 27 :2005).

Ne da bi se spuščali (sicer potrebno) podrobno obravnavo načinov preobražanja družbe na različnih področjih in ravneh, naj opozorimo le na glavno značilnost njihove legitimizacije (upravičevanja). Ob opori na redukcionistični in dehistorizirani pristop se je javni diskurz večinoma napajal v ideologiji protisocializma oziroma (že v skladu s temeljnim pristopom) protikomunizma. Zagovarjanje novega družbenega reda, kot ga prakticirajo politično desno usmerjene stranke in ki večinoma poteka v imenu »prave demokracije«, se je krepilo od začetka državne samostojnosti, vseskozi pa je temeljilo na predpostavki,

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5. Ob 25-letnici teh volitev je bilo na in ob proslavi (7. aprila 2015 v CD, prenos na TV SLO 1) večkrat poudarjeno, da so te volitve pomenile »vrnitev demokracije«. Ta dogodek se tudi sicer pogosto poudarja. Kardinal F. Rode je npr. v slavnostni maši na Blejskem otoku ob dnevu Marijinega vnebovzeta (15. 8. 2014) poudarjal željo, »da bi se naša domovina osvobodila posledic totalitarne preteklosti /.../. Da bi bila prostor prave demokracije.«
  6. Denacionalizacija na Slovenskem je po oceni S. Dragoša in V. Leskošek (2003: 37) »največji 'socialni' transfer vseh časov. Denacionalizacijo je edina na vsem svetu uvedla samo Slovenija v obsegu stoo odstotnega vračanja v naravi, vključno s fevdalno lastnino.«
  7. Če upoštevamo samo razmerje med premoženjskimi dohodki pri desetini najrevnejših in najbogatejših, je 10 % prvih leta 1983 razpolagalo z 2,2 % premoženja, 10 % najbogatejših pa s 17,6 %; v letih 1997-1999 pa sta ustrezna deleža 0,3 % in 62,5 %.



da je komunizem zločinski sistem,<sup>8</sup> ki ga je treba celovito zrušiti, tudi z vračanjem »prave morale« v javno življenje. Po lastni, nenehno ponavljani oceni pa naj bi bila glavna nosilka te moralne prenovne ravno Katoliška cerkev (Jogan 2008; Smrke 2008), ki je tudi največja denacionalizacijska upravičenka (Dragoš 2014: 184). Prav ta institucija ima bogate izkušnje z bojem proti komunizmu in je po osamosvojitvi le nadaljevala s prakso, ki je bila z običajnim obredjem utrjena že v tridesetih letih 20. stoletja.<sup>9</sup>

V imenu »demokratizacije« se je v samostojni državi poskušalo odpravljati vse, kar naj bi bilo »ideološko«<sup>10</sup> oziroma kakor koli povezano s socializmom ali kar »komunizmom«. Ob obravnavi družbene neenakosti Dragoš in Leskošek (2003: 21) ugotavljata: »Domneva se, da tisto, kar je bilo značilno za socializem, ni združljivo z Evropo.« Zato je v diskurzivnem nasprotovanju socializmu zelo priročen tudi pojem evropeizacija, ki naj bi glede na preteklo državno pripadnost (»Balkanu«) dobil še dodaten, višji civilizacijski sopomen. Kljub površinskemu priseganju na neideološkost v ocenah socialistične preteklosti ter v zagovorih »evropske« sedanosti in prihodnosti pa je na podlagi mnogih indikatorjev mogoče sklepati, da gre dejansko za drugačno ideološko usmeritev, ki sicer površinsko pripoznava civilizacijske vrednote (kot so že od francoske revolucije naprej svoboda, enakost, solidarnost), globinsko pa s svojo zasidranostjo v (neo)liberalistični praksi kapitalizma celovito razdira družbene temelje za njihovo uresničevanje pri večini prebivalstva. Prav neposredne izkušnje večine prebivalstva z »modernizacijo« in racionalizacijo na vseh področjih in ravneh družbenega delovanja, ki se še posebej izražajo v času krize (po letu 2008), brez dvoma spodbujajo spremembe v vrednotenju socializma in kapitalizma.

## 2 Namen prispevka in opis metode

Skopi oris nekaterih bistvenih značilnosti, ki so posledica prehoda slovenske družbe iz socialističnega v kapitalistični družbeni sistem, je podlaga za lažje razumevanje sprememb v kolektivni zavesti. Namen tega prispevka ni celovito razkrivanje kompleksne sestave in raznolikih načinov ustvarjanja kolektivne zavesti, vključno z najpomembnejšimi producenti pomenov in smisla življenja; o tem obstaja vrsta drugih del. V tem prispevku bo spoznavna

8. Besednjak v javnem govoru, s katerim zasramujejo »komunizem«, je izjemno sovražen, poln najbolj pritlehnih sramotilnih oznak in klevet. Kot primer lahko navedemo samo nekaj oznak »komunistov«, ki so bile sporočene javnosti na shodu v podporo J. Janši 10. decembra 2014: »komunistična barbarska horda«, »rdeče pijavke«, »dediči izrodov rdeče idiot-revolucije«, pripadniki »rdečega satanizma nad slovenskim narodom«. Kot opora v teh prizadevanjih služi tudi Resolucija Evropskega parlamenta o evropski zavesti in totalitarizmu (2. april 2009), po kateri je prav komunizem najbolj nevaren totalitarizem.

9. Tako so se npr. molitve ob nedeljskih mašah končevale s prošnjo: »Lakote, kuge in komunizma reši nas, o Gospod!« Sicer pa je bil boju zoper komunizem namenjen del množičnega tiska (npr. časnik Slovenec, ki ga je od 1929 do 1942 urejal Ivan Ahčin) in več knjižnih objav (npr. Ahčin 1939).

10. Ves čas po osamosvojitvi se v javnem govoru uporablja pojem »ideologija« v izrazito slabšalnem pomenu, hkrati pa izjemno široko za označevanje vsega mogočega, kar je kakor koli povezano s pozitivnim vrednotenjem socializma.

pozornost omejena le na iskanje odgovora na vprašanje, kako se je v času samostojne države spreminjal odnos prebivalcev Slovenije do socializma in kapitalizma.

Kot indikatorje za ugotavljanje sprememb v vrednotenju teh dveh pojavov bomo upoštevali stališča in ocene, ki se nanašajo na a) socialistično obdobje nasploh in po časovnem zaporedju razvojnih etap, b) kakovost življenja pred osamosvojitvijo in v samostojni državi, c) odnos do pojmov Evropa, socializem in kapitalizem, č) skladnost nekaterih eksistencialno pomembnih determinant vsakdanjega življenja (kot so pravičnost in človečnost ter blagostanje in neenakost) v predstavah prebivalstva o enem in drugem sistemu.

Prvi vpogled v spremenljivo kolektivno zavest omogoča vrsta raziskav slovenskega javnega mnenja,<sup>11</sup> v katerih so bila od 1990 do 2013 longitudinalno zastavljena ustrezna vprašanja in na reprezentativnih vzorcih zbrani podatki o stališčih posameznih polnoletnih oseb. Za pričujočo analizo so bila opravljena križanja ustreznih vprašanj z naslednjimi sociodemografskimi spremenljivkami (bodisi z vsemi naštetimi ali samo z nekaterimi): spol, starost, izobrazba, kraj bivanja, vernost. Izbira teh neodvisnih spremenljivk je posledica poznavanja neenakih učinkov zamenjave sistema na posamezne socialne kategorije, ki se kopičijo zlasti ob dimenziji spola in statusne pripadnosti. V analizi podatkov so uporabljena orodja opisne statistike, interpretacija pa te izsledke dopolnjuje z vidika njihove umeščenosti v strukturne okoliščine, upoštevajoč tudi različne relevantne dokumente (predvsem v pisni obliki) in tiste dejavnosti, ki lahko učinkujejo na javno mnenje.<sup>12</sup> Zaporedje obravnave tematike sledi zgodovinskemu časovnemu traku, zato so predmet zanimanja najprej stališča o socializmu.

### 3 Socializem ali totalitarizem

Medijsko četrt stoletja razširjana predstava, da je čas socializma (od 1945 do 1990) »svinčeni čas« prevlade totalitarizma, je primerna spodbuda za iskanje odgovora na vprašanje, kako to obdobje ocenjujejo polnoletni prebivalci Slovenije. Ti so v dveh desetletjih sedemnajstkrat ocenjevali takratne razmere tako, da so izmed navedenih trditev izbrali tisto, ki jim je bila »osebno najbližje«. Spodbujeni z uvodno mislijo *Obstajajo različna mnenja o razmerah, v katerih smo živeli v Sloveniji v desetletjih po 2. svetovni vojni – vse do volitev 1990. Navajamo jih nekaj, vi pa povejte, katero je vam osebno najbližje.*<sup>13</sup> so se odločali drugače, kot jim dnevno dopovedujejo javni in mnogi zasebni mediji, o čemer govori tabela 1.

11. Vse raziskave so bile izvedene v Centru za raziskovanje javnega mnenja in množičnih komunikacij (CJMMK) na FDV na reprezentativnih vzorcih polnoletnih prebivalcev; osnovni podatki so v Toš (1999, 2004, 2009, 2013), natančne navedbe pa pri posameznih vidikih obravnave.

12. Zato so v opombah večkrat navedeni viri, ki se pojavljajo v množičnih občilih (pisnih in elektronskih), zlasti v javnih medijih, in ki so pogosto zapisi (oziroma prenos) neposrednega javnega govora zbranim udeležencem, npr. pri cerkvenih obredih, na strankarskih shodih ipd. Verjetno je javni diskurz za najširšo javnost tudi bolj pomemben določevalac stališč kot znanstvene razprave.

13. Za ugotavljanje smeri spreminjanja ocen so izbrani podatki štirih raziskav: SJM 93/1 – 5.02, SJM 01/2 – 1.15, SJM 11/2 – S30 in SJM 13/1 – S68. Možen je bil le en odgovor. Pri podatkih so izpuščeni deleži »b. o.«, ker so zanemarljivi – okoli 1,0 %.

**Tabela 1: Ocene razmer v Sloveniji (1945–1990) po SJM 1993–2013**

%	to obdobje je čas strahu in zatiranja	bilo je marsikaj dobrega, pa tudi marsikaj slabega	to je bil čas napredka in dobrega življenja	ne vem, b. o.
<b>1993</b>	6,1	67,1	16,5	8,5
<b>2001</b>	4,3	69,6	20,4	3,9
<b>2011</b>	5,5	55,2	24,8	10,2
<b>2013</b>	8,6	56,4	25,2	7,8

Le pičli manjšini je blizu ocena razmer, ki socializem enači s totalitarizmom. Tako je v vseh meritvah med letoma 1993 in 2013 prepričanih manj kot ena dvanajstina vprašanih. Večina prebivalstva v socialističnem obdobju ne vidi le slabosti, strahu in zatiranja. Da je bilo v tem času »marsikaj dobrega, pa tudi marsikaj slabega«, je po vseh meritvah prepričanih več kot polovica polnoletnih oseb, čeprav je to mnenje v dvajsetih letih oslabelo. Od leta 1993 do 2013 se je očitno okrepilo mnenje, da je bil čas do leta 1990 »čas napredka in dobrega življenja«: od prve do zadnje meritve to mnenje nadpovprečno sprejemajo neverne (1993: 20,7 % in 2013: 33,8%) in versko neodločene osebe. Po meritvi leta 2011 so tej oceni najmanj naklonjeni pripadniki NSi.

Kljub temu da četrtnina odraslih oseb v letu 2013 pozitivno ocenjuje obdobje socializma in da je več kot polovica prebivalstva pri vmesni oceni, se slabšalne in skrčene ocene o tem času kot totalitarizmu nikakor ne umikajo iz javnega govora. Trdovratno razširjanje in ponavljanje takšnih ocen je verjetno (vsaj delno) prispevalo k temu, da se je v zavesti ljudi zmanjšalo zavedanje o drugačnosti socializma v Sloveniji (in Jugoslaviji) glede na »komunizem« v »vzhodnem bloku«.

O tem govorijo odgovori (v raziskavah javnega mnenja od 1995 do 2012<sup>14</sup>) na vprašanje: *Kaj vi osebno menite, ali se je režim v SFR Jugoslaviji razlikoval od režima v Sovjetski zvezi in državah vzhodnega bloka ali se ni razlikoval?* Glede prvih povojnih let (do leta 1950) se je v prvi meritvi (1995) največ oseb odločilo za stališče, da se je jugoslovanski režim »delno razlikoval od sovjetskega« (40,3 %), leta 2012 pa se je ta delež zmanjšal na 31,5 %. Hkrati se je zelo zmanjšal delež tistih, ki so (bili) prepričani, da se režima nista »bistveno razlikovala« (z 29,6 % na 13,1 %). Domnevamo lahko, da posplošeni govor o socializmu kot zatiralskem sistemu, ki naj bi imel univerzalno veljavo, ne teče v prazno, čeprav se je nekoliko povečal delež tistih, ki menijo, da je šlo za bistvene razlike (z 18,3 % na 23,7 %). Ob marginaliziranju značilnosti »socializma s človeškim obrazom«, k čemur prispeva tudi izobraževalni proces, ne preseneča, da se je od prve do druge meritve delež nevednih povečal skoraj za trikrat (z 11,8 % na 31,7 %), zlasti pri ženskah (na 37,4 %), osebah z osnovno in poklicno izobrazbo (36,7 % in 35,3 %) ter pri starih do 30 let (33,9 %).

14. Raziskave: SJM 95/3 – V89 in V90, SJM 98/2, SJM 03/1 in SJM 12/2 – P 35 in P 36.

Bolj pomembna so mnenja o dogajanju v obdobju 60. let, po uveljavitvi samoupravljanja, do osamosvojitve. Da je v tem času obstajala bistvena razlika med primerjanima sistemoma, je bilo leta 1995 prepričanih več kot polovica vprašanih (54,6 %), leta 2012 pa le še tretjina (33,8 %). Medtem ko se deleža tistih, ki so v času od 1995 do 2012 zagovarjali delno (29,7 % in 27,6 %) ali ne bistveno razliko (6,4 % in 5,6 %), skorajda nista spremenila, se je izredno povečal delež nevednih, in sicer za več kot trikrat (z 9,4 % na 32,9 %). Leta 2012 vsaka tretja odrasla oseba ne zna oceniti razlike med samoupravnim socialističnim sistemom in sovjetskim (»realnim«) socializmom, samo še vsaka tretja pa je prepričana, da so obstajale bistvene razlike. Občutljivost za razlike med sistemoma socializma se v samostojni Sloveniji ne more ohranjati, sploh pa ne razvijati, ker so strukturno producirane podlage za to vedno bolj šibke, individualne izkušnje pa zamirajo.

Nevednost se povečuje tudi pri drugih vidikih ocenjevanja obdobja po drugi svetovni vojni. Tako se je delež nevednih glede trditve, da je v Sloveniji po letu 1945 pa vse do osamosvojitve vladala diktatura,<sup>15</sup> od leta 1995 do 2012 dvignil z 9,1 % na 21,6 %, (v letu 2012 nadpovprečno pri ženskah – 27,2 %). V obeh meritvah je približno petina vprašanih neodločena. Nasprotovanje oceni o neprekinjeni diktaturi po letu 1945 je sicer od prve do zadnje meritve oslabilo (zmanjšanje deleža z 41,7 % na 34,5 %), še vedno pa je takšno mnenje močnejše zastopano kot zagovarjanje takšne ocene (1995: 28,6 %; 2012: 21,7 %).

Verjetno se je na račun izrazitega povečanja nevednosti (s 7,2 % leta 1995 na 26,3 % leta 2012) zmanjšal tudi delež tistih, ki se strinjajo s trditvijo, da je bil sistem socialističnega samoupravljanja dobro zamišljen, le da ni bil tudi tako uresničen:<sup>16</sup> z dveh tretjin v letu 1995 (66,2 %) na dobro polovico (52,7 %) v letu 2012. Takšne ocene so leta 2012 nadpovprečno izražene zlasti pri vprašanih, starih nad 60 let (57,0 %), in pri moških (56,3 %), podpovprečno pa pri starih do 30 let (46,6 %) ter pri ženskah in bivajočih na vasi (49,7 %); glede te ocene samoupravljanja pa se ni sposobna opredeliti vsaka sedma oseba (vsaka osma ženska in vsak peti do šesti moški).

## 4 Sprememba sistema: napredek ali nazadovanje

Pričakovanja, da bi sprejem evropske »normalne« ureditve prinesel napredek, so bila v zadnjem desetletju samoupravnega socializma že ugnezdena v vsakdanji zavesti, čeprav pojem kapitalizem ni nastopal kot eksplicitna ustreznica, temveč kot delno skriti partner. V javnem diskurzu so namreč prevladovali obljube o tem, kako bo »demokracija« prinesla boljše možnosti življenja, na kar se je skrčilo javno predstavljanje prednosti večstrankarske politične ureditve ob zamolčevanju ekonomske vsebine, ki se je vezala na »stare demokracije«. Kot ponazorilo za razširjenost predstav o boljši prihodnosti lahko vzamemo podatek iz raziskave SJM 1991/1 (vprašanje 59), ko so vprašani odgovarjali na vprašanje: *Prosim, povejte mi, katera od besed na seznamu najbolj ustreza vaši predstavi*

15. Raziskavi SJM 95/3 – V100 in SJM 12/2 – P39.

16. Raziskavi SJM 95/3 – V102 in SJM 12/2 – P41.

o kapitalističnem gospodarstvu svobodnega podjetništva in o socialističnem gospodarstvu brez privatnih podjetij. Na prvem mestu je »napredek«, ki je ustrezal predstavi o kapitalističnem gospodarstvu pri več kot treh četrtinah vprašanih (77,3 %), sledi mu »dobiček«, na zadnjem mestu je kot ustreznica »pravičnost« (34,4 %).

Z uvedbo novega družbenega reda se je pričakovanje o napredku hitro razblinilo ob naraščanju neenakosti in revščine ter zmanjševanju socialne varnosti večine prebivalstva. O slabšanju razmer že v prvi polovici devetdesetih govori razmerje med povprečnimi dohodki 10 % zaposlenih z najnižjimi dohodki in 10 % zaposlenih z najvišjimi dohodki, ki je bilo leta 1984 1 : 3,5, leta 1990 1 : 5, 1996 pa že 1 : 6,5 (Hafner Fink 1999: 179, 180). Razlike med dohodki so se do sedaj še povečevale,<sup>17</sup> vedno pomembnejše za kakovost življenja pa so razlike glede na premoženje. Tako ima npr. po podatkih o razpolaganju z nepremičninami v letu 2014 81.000 slovenskih državljanov na družbenem dnu v lasti nepremičnine v vrednosti 47 milijonov evrov; 81.000 oseb na vrhu pa v vrednosti 25,1 milijarde evrov.<sup>18</sup> Revščina je postala izjemno očiten pojav, hkrati pa je postajala socialna politika, ki naj bi blažila negativne učinke tržne ekonomije, vedno bolj podrejena ekonomski (Leskošek in Dragoš 2014: 40). Kapitalistični ekonomski red je bolj prizadel ženske, kar se je pokazalo že v prvem desetletju (Jogan 2000: 18) in se nadaljuje v drugem, zlasti v času krize. Različni protikrizni ukrepi (predvsem v javnem sektorju) so namreč bolj prizadeli ženske tako v drugih evropskih državah kot v Sloveniji (Collins 2013; Humer in Roksandič 2014; Leskošek in Dragoš 2014: 42).

O negativnih, družbenorazkrojevalnih učinkih kapitalističnega reda govore tudi ocene, ki so bile izražene v raziskavi javnega mnenja leta 2013,<sup>19</sup> ko so se anketirani izražali o trditvi *Tudi pogledi na razvoj in življenjske razmere v Sloveniji v zadnjih dveh desetletjih – po osamosvojitvi – so različni. Navedli vam bomo nekaj pogledov, vi pa povejte, kateri od teh je vam najbližji*. Na prvem mestu (z 49,7 %) je ocena *To je bil čas poglobljanja socialnih razlik med ljudmi; bogati so postajali še bogatejši, revni še bolj revni; bil je čas nenehnih političnih spopadov*. Nadpovprečno so to oceno izrazili neverni (55,6 %), anketirani s poklicno izobrazbo (55,3 %), bivajoči na vasi in vsi, ki so stari več kot 30 let (okoli 53 %). Tretjina vprašanih (34,0 %) se je odločila za odgovor *bilo je marsikaj dobrega, pa tudi marsikaj slabega*, pri čemer so krepko nad povprečjem stari do 30 let (42,9 %). Samo desetina anketiranih (10,1 %) je bila mnenja, da je *to bil čas uveljavljanja slovenske demokratične države, čas napredka in izboljševanja življenjskih razmer ljudi*. Nevednih je bilo leta 2013 zelo malo (5,4 %): samo vsaka dvajseta oseba ni znala izraziti svoje ocene, v letu 2011 pa vsaka deseta. Verjetno je na mestu domneva, da nizek delež nevednih ni znak neukosti, temveč prej izraz osebne izkustvene presoje in neprekinjenega opazovanja dogajanja v državi (*in situ ter in vivo*).

17. B. Mekina navaja primer Gorenja, kjer je v letu 2015 razmerje 1 : 21. Na podlagi podatkov Geodetske uprave pa je razmerje med spodnjimi in zgornjimi 10 % lastnikov nepremičnin celo 1 : 531 (Cerarjeva pomoč najbogatejšim, Mladina, 10. 7. 2015, str. 30, 31).

18. Mladina, 4. 4. 2014.

19. Ogledalo javnega mnenja – SJM 2013 (S69) (potek raziskovanja: od 21. 9. 2013 do 18. 12. 2013; N = 1800, realizacija N = 1010). Na isto vprašanje v SJM 2011/2 je večina (50,6 %) odgovorila tako kot v letu 2013.

Torej ne neke »ideološke« predpostavke, temveč vsakdanje praktične izkušnje na ključnih področjih uresničevanja sistema družbene blaginje pri večini prebivalstva spodbujajo kritično presojo novega družbenega sistema. Že v letu 1992<sup>20</sup> je večina prebivalstva ocenila, da so se življenjske razmere po osamosvojitvi poslabšale, kar kažejo odgovori na vprašanje *Če primerjate življenje pri nas danes z življenjem pred približno petimi leti, ali so po vaši sodbi razmere glede na našete stvari danes boljše, približno enake ali slabše?* Da so (dosti) slabše, se je pri splošni oceni »kako živijo ljudje« odločilo 73,8 % vprašanih, pri »možnosti dobiti stanovanje« 70,1 %, pri »možnosti imeti, preživljati otroke« 82,4 % in pri zdravstvenem varstvu 62,8 % vseh vprašanih. To so podatki, ki jih pri ocenjevanju postsocialističnega obdobja nikakor ni mogoče zanemariti, saj kažejo na to, da so se hitro razblinila lepa pričakovanja, čeprav v Sloveniji prehod v kapitalizem (vsaj v prvem desetletju) ni potekal v obliki šok terapije.

## 5 Privlačnost pojma Evropa po evropeizaciji

Glede na to, da je Evropa nastopala kot navezni okvir za upravičevanje uveljavljanja kapitalističnega sistema, je vredno pogledati, ali je »evropeizacija« imela kakšen učinek na vrednotenje tega pomensko omnipotentnega pojma. O občutljivosti polnoletnega prebivalstva za kompleksne spremembe, ki so vstopale v slovenski družbeni prostor pod pojmom Evropa, lahko sklepamo na podlagi sprejemanja njenega pozitivnega vrednotenja od začetka samostojne države naprej, kar kaže graf 1.<sup>21</sup>

Odnos do pojma Evropa se je v dvaindvajsetih letih izredno močno spremenil. V letu 1991 je imelo (zelo) pozitiven odnos do pojma Evropa dobre tri četrtine vseh polnoletnih vprašanih, le 14,0 % je bilo nevtralnih in komaj peščica (2,9 %) jih je imela (zelo) negativen odnos; nevtralna glede tega pojma je bila vsaka sedma oseba, leta 2013 pa vsaka tretja (delež je 34,8 %), medtem ko ima negativen odnos skoraj vsaka deveta oseba (delež je 11,5 %), leta 1991 pa le vsaka 34. oseba.

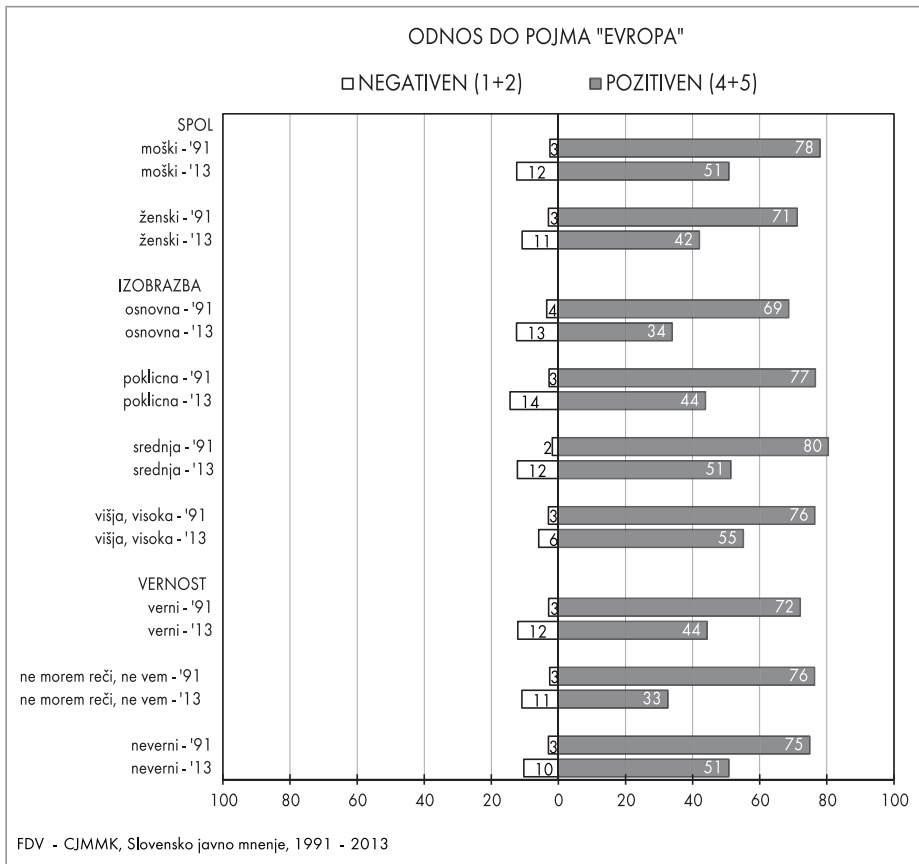
Zmanjševanje pozitivnega in naraščanje negativnega odnosa do pojma Evropa (zlasti glede na meritve SJM od leta 2011 naprej) je verjetno posledica gospodarske krize in načina njenega reševanja, ki ni razredno in spolno nevtralnno; razlike so v obsegu ter tudi znotraj posamezne kategorije. Tako se je pri ženskah v primerjavi z moškimi (po podatkih za leto 2013) močneje skrčila naklonjenost pojmu Evropa (za 10,3 odstotne točke, pri moških za 7,9), in tudi manjši delež žensk je tako naravnani (le 42 %), medtem ko ima dobra polovica moških še vedno pozitiven odnos.

Evropeizacija torej ni prispevala k večji naklonjenosti večine prebivalstva do (krovnega) pojma Evropa, kar dodatno osvetljuje spremenjeno umeščanje pojmov socializem in kapitalizem v zavesti polnoletnega prebivalstva v dveh desetletjih.

20. Raziskava SJM 1992/3 - 1.02.

21. Podatki so iz SJM 91/2 - S41 in SJM 13/1 - S41. Deleži so zaokroženi na cele številke.

Graf 1: Odnos do pojma Evropa po meritvah SJM 1991 in 2013 (v %)

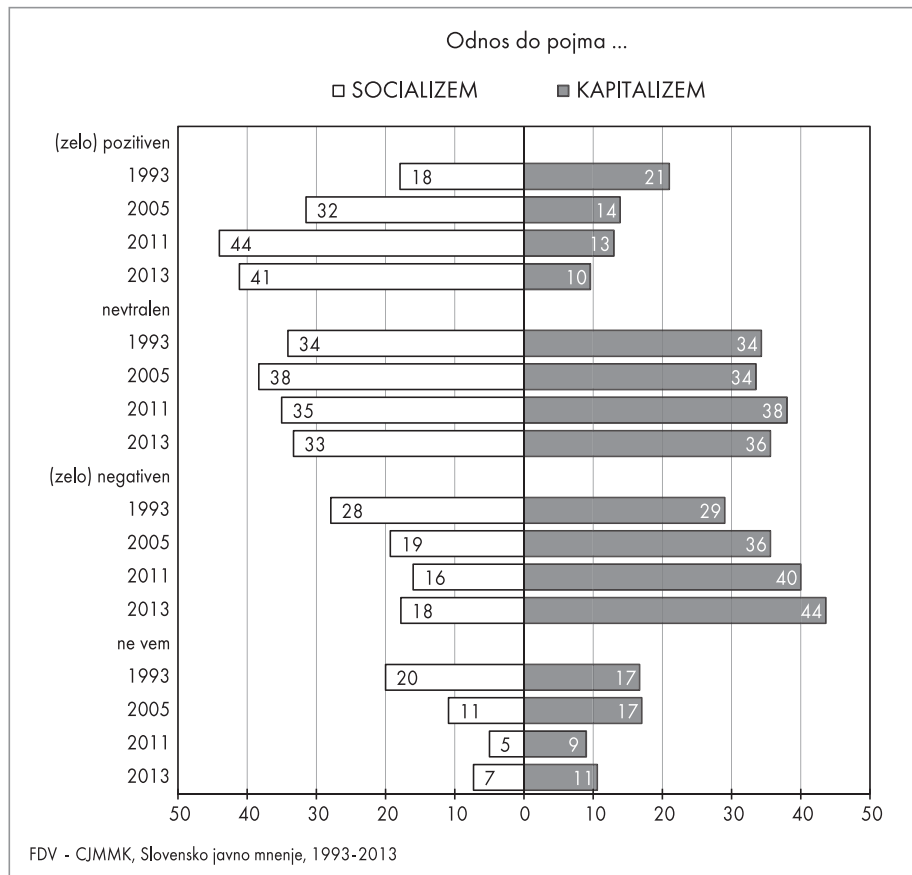


## 6 Privlačnost pojmov socializem in kapitalizem

Z oddaljevanjem od socialističnega sistema, predvsem pa s kopičenjem izkušenj s kapitalistično ureditvijo se očitno spreminja tudi odnos do samih pojmov socializem in kapitalizem. Graf 2 kaže spreminjanje ocen odnosa do teh dveh pojmov od leta 1993 do 2013, kakor so jih »brez posebnega razmišljanja« določili vprašani ob naslednji možnosti: *Našteli vam bomo nekaj besed oz. pojmov, vi pa na hitro, po prvem vtisu, brez dolgega razmišljanja ocenite, ali imate do njih zelo pozitiven, pozitiven, negativen ali zelo negativen odnos.*<sup>22</sup>

22. Raziskave: SJM 93/1 - 1.11, SJM 05/1 - 3.02, SJM 11/2 - S45 in S56, SJM 13/1 - S26 in S39.

**Graf 2: Odnos do pojmov socializem in kapitalizem v letih 1993, 2005, 2011 in 2013 (v %)**



Pozitivno vrednotenje socializma se je v dvajsetih letih zelo okrepilo: z manj kot petine leta 1993 na dobri dve petini odraslih oseb leta 2013. Do socializma so v letu 2013 najbolj pozitivno naravnani prepričani ateisti (59,2 %), stari nad 60 let (50,8 %), bivajoči v mestih (50,1 %), najmanj pozitivno naravnanih pa je med osebami, starimi do 45 let (32,2 %); ženske so v primerjavi z moškimi nekoliko bolj pozitivno naravnane (42,1 % : 39,8 %).

Delež neopredeljenih glede socializma se je po manjšem dvigu leta 2005 zmanjšal in znaša v letu 2013 eno tretjino (ki jo presegajo stari do 45 let in neverni), najmanj neopredeljenih je pri starih nad 60 let (22,5 %). Stalno se je (do leta 2013) zmanjševalo negativno vrednotenje socializma (ki je sedaj navzoče pri manj kot eni šestini odraslih oseb), podobno tudi nevednost: leta 1993 ni vedela odgovora vsaka peta oseba, leta 2011 vsaka dvajseta in leta 2013 vsaka štirinajsta.

Ocenjevanje kapitalizma se je gibalo v nasprotni smeri: pozitivno vrednotenje je precej oslabevalo (z 21,0 % na 9,6 %). Hkrati se je precej okrepilo negativno vrednotenje



(z 29,0 % na 40,0 %). Nadpovprečno negativno so ocenjevali kapitalizem stari nad 45 let tako leta 1993 (okoli 33 %), kakor tudi 2013 (47,9). Delež neopredeljenih v odnosu do pojma kapitalizem je v dvajsetih letih stabilen in okoli ene tretjine, delež nevednih pa se je od leta 1993 do 2013 zmanjšal (s 16,7 % na 10,6 %). V letu 2013 med nevednimi prevladujejo zlasti osnovnošolsko izobraženi (20,8 %). Zmanjšanje nevednosti glede pojma kapitalizem bi lahko razumeli kot posledico vedno bolj intenzivnega osebnega srečevanja s kapitalističnimi vzorci urejanja delovnih in vseh drugih razmerij v družbi.

## 7 Pomembne vrednote in družbena dejstva v predstavah o različnih družbenih sistemih

Spreminjanje odnosa do pojmov socializma in kapitalizma, ki je objektivno pogojeno s strukturnimi učinki, se subjektivno opira na presoje o pravičnosti in humanosti družbene regulacije. Kot poudarjata Rus in Toš (2005: 53, 54), je socialna država, ki se je v drugi polovici 20. stoletja razvila v državo blaginje, strukturni korelat pravične družbe. Tako minimalna oblika socialne države kot država blaginje »sta podvrženi kriteriju pravičnosti, in ne kriteriju učinkovitosti, ki velja za ekonomijo«, vsi njuni zagovorniki pa priznavajo »tudi dejstvo, da je pravičnost najvišje merilo pri družbeni regulaciji ene ali druge države« in da je »pravičnost uveljavljena tedaj, ko je doseženo določeno ravnotežje med svobodo in enakostjo«.

Prav to ravnotežje se je v samostojni državi Sloveniji vedno bolj razgrajevalo ter zlasti v zadnjih letih krize privedlo do velike socialne in ekonomske neenakosti in revščine. Čeprav naj bi država reševala naraščajoče neskladje med svobodo na trgu ter socialno in ekonomsko enakostjo, je omejevanje socialnih pravic in krčenje stroškov za blaginjo prispevalo k temu, da je slovenska družba (z razmeroma uspešnim socialističnim sistemom blaginje) postala na novo razslojena, vendar po merilih, ki so tipična za fevdalno in kastno družbo (Leskošek in Dragoš 2014: 49).

V obravnavo spremenljivega vrednotenja socializma in kapitalizma je torej več kot primerno vnesti vprašanje, kako so v predstavah o posameznem sistemu navzoči najprej ključna urejevalna vrednota pravičnosti in z njo neločljivo povezana človečnost, katerima sledita dva materialna pojava, neenakost in blagostanje. Brez dvoma so vsakdanje praktične izkušnje prispevale k lažjemu odločanju o tem, kako se pravičnost in človečnost, ki sta univerzalno pomembni merili za vsak družbeni red, skladata s predstavami posameznikov o socialistični in kapitalistični družbi. Preobrazbe v množični zavesti v času od 1991 do 2013 in opomba 23. kaže tabela 2.

23. V obeh raziskavah slovenskega javnega mnenja so bile anketirane osebe za vprašanjem o vrednotenju različnih pojmov (med drugim tudi pojmov kapitalizem in socializem) naprošene, da povedo še, *ali navedeni pojmi ustrezajo ali ne ustrezajo vaši predstavi o socialistični /oz. kapitalistični/ družbi*, med drugimi pravičnost (SJM 91/1 - S48 in SJM 2013/1 - S60) in človečnost (SJM 91/1 - S50 in SJM 2013/1 - S62).

**Tabela 2: Pravičnost in človečnost v predstavah o socializmu in kapitalizmu (1991–2013).**

%	pravičnost			človečnost		
	ustreza	ne ustreza	ne ve	ustreza	ne ustreza	ne ve
<b>socializem</b>						
<b>1991</b>	37,8	43,7	18,5	51,3	28,9	19,8
<b>2013</b>	64,9	22,3	12,9	75,0	12,8	12,2
<b>kapitalizem</b>						
<b>1991</b>	34,4	46,4	19,2	36,0	43,6	20,4
<b>2013</b>	26,5	61,8	10,2	32,0	55,0	11,9

Ti podatki so nazoren prikaz tendenc spreminjanja s časovno vzporednega in zaporednega vidika. Ko glede na pravičnost primerjamo dojetje socializma s podobo kapitalizma na začetku preloma s socializmom (1991), vidimo, da pri dobri tretjini anketiranih ni velikih razlik: pravičnost ustreza tako njihovim predstavam o socialistični kakor tudi o kapitalistični družbi.

Časovno zaporedna primerjava pa kaže velike zasuke ter ostro ločevanje med predstavami o vsebnosti pravičnosti in človečnosti v (predhodno doživetem) socialističnem redu in (sveže doživljanem) kapitalističnem. Delež tistih, ki pravičnost povezujejo s socializmom, se je z dobre tretjine povečal na skoraj dve tretjini: nadpovprečno pri prepričanih ateistih (73,1 %), mestnem prebivalstvu (71,6 %) in starejših od 45 let (70,0 %). Hkrati se je delež oseb, pri katerih pravičnost ustreza njihovim predstavam o kapitalizmu, zmanjšal z ene tretjine na eno četrtino; to mejo presegajo zlasti srednješolsko izobraženi (33,8 %) in mladi (32,8 %).

Po prvi meritvi tudi pri odločanju o neskladnosti pojma pravičnost s predstavo socializma in kapitalizma ni velikih razlik: tako meni manj kot polovica vprašanih oseb v obeh primerih. V letu 2013 pa se je delež tistih, katerih predstave o kapitalizmu ne ustrezajo pravičnosti, približal dvema tretjinama (zlasti pri višje in visoko izobraženih – 69,3 %, pri starih od 46 do 60 let – 69,3 %, prepričanih ateistih in nevernih – 67,7 % in 66,1 %). Hkrati se je pri oceni skladnosti pravičnosti s socializmom oziroma kapitalizmom od leta 1991 do 2013 skoraj prepolovil (sicer majhen) delež tistih, ki ne vedo odgovora (z okoli ene petine na približno desetino); podobno je tudi glede človečnosti.

Glede pojma človečnosti (humanosti) je že v prvi meritvi prevladovala ocena o ustreznosti s predstavo socializma, ki se je v zadnji meritvi še dvignila (od polovice do treh četrtin vseh vprašanih); nad povprečjem so prepričani ateisti (84,6 %). Hkrati se ni bistveno spremenil delež tistih, ki menijo, da človečnost ustreza njihovi predstavi o kapitalizmu (ostaja okoli ene tretjine), delež tistih, katerih dojetje človečnosti ni ustrezno njihovi predstavi o kapitalizmu, pa se je precej povečal, na več kot polovico (55 %). V zadnji kategoriji izstopajo z nadpovprečnimi deleži zlasti visoko izobraženi in stari od 46 do 60 let (67,7 % in 65,5 %) ter prepričani ateisti in neverni (62,3 % in 60,3 %).

Soočenje dveh sistemov v dinamični kolektivni zavesti polnoletnega prebivalstva glede na dojetje njune poveztivosti s pretežno moralnima vrednotama, kot sta pravičnost in človečnost, bo dopolnjeno z odnosom do dveh (materialnih družbenih) dejstev, katerih upravljanje je bistveno razlikovalno glede na sistem in katerih razporeditev je neločljiva sestavina (različne) kakovosti življenja: neenakost in blagostanje. Spremembe v dojetanju ustreznosti pojmov, ki označujeta ta dva pojma, prikazuje tabela 3. in opomba 24.

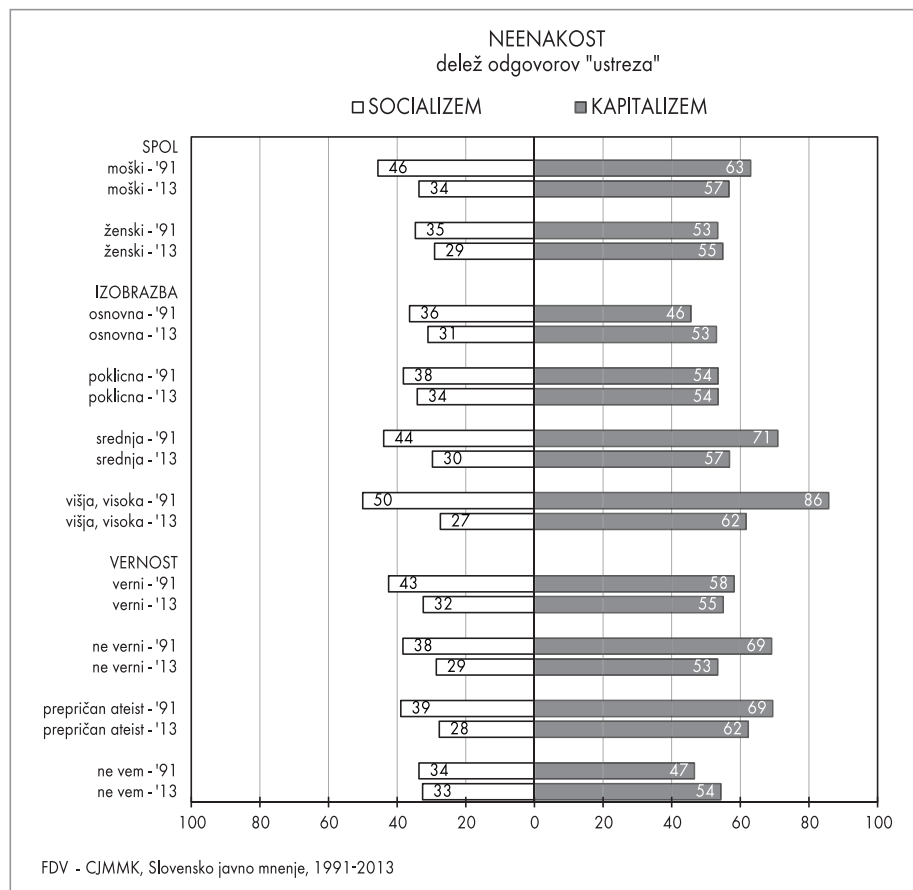
**Tabela 3: Neenakost in blagostanje v predstavah o socializmu in kapitalizmu (1991–2013).**

%	neenakost			blagostanje		
	ustreza	ne ustreza	ne ve	ustreza	ne ustreza	ne ve
<b>socializem</b>						
<b>1991</b>	40,2	42,0	17,8	30,9	50,3	18,8
<b>2013</b>	31,1	57,7	11,2	61,1	24,7	14,3
<b>kapitalizem</b>						
<b>1991</b>	58,3	23,6	18,1	63,1	18,7	18,2
<b>2013</b>	55,6	31,6	12,8	42,8	41,3	15,9

Ob tem ko se je nevednost glede ustreznosti pojma neenakost v predstavah o obeh sistemih od leta 1991 do 2013 nekoliko zmanjšala, je ocena o ustreznosti tega pojma s predstavo o kapitalizmu skoraj nespremenjena in prevladujoča; hkrati se je močno povišala ocena o neustreznosti pojma neenakosti v predstavah o socializmu, ki jo izraža več kot polovica anketiranih. Tako se je skoraj izenačeno ocenjevanje o ustreznosti in neustreznosti neenakosti v predstavah o socializmu (dve petini vseh) v začetku uvajanja kapitalističnega sistema po dobrih dveh desetletjih preobrazilo v izrazito asimetrično, saj v povprečju le slaba tretjina povezuje socializem z neenakostjo. Kot kaže graf 3, so pod tem povprečjem višje in visoko izobraženi (pri katerih je tudi največje znižanje – za 23 odstotnih točk), prepričani ateisti in neverni, ženske ter tisti s srednjo izobrazbo. Brez bistvenih razlik glede na vse tri izbrane spremenljivke v letu 2013 več kot polovica vprašanih povezuje neenakost s kapitalizmom.

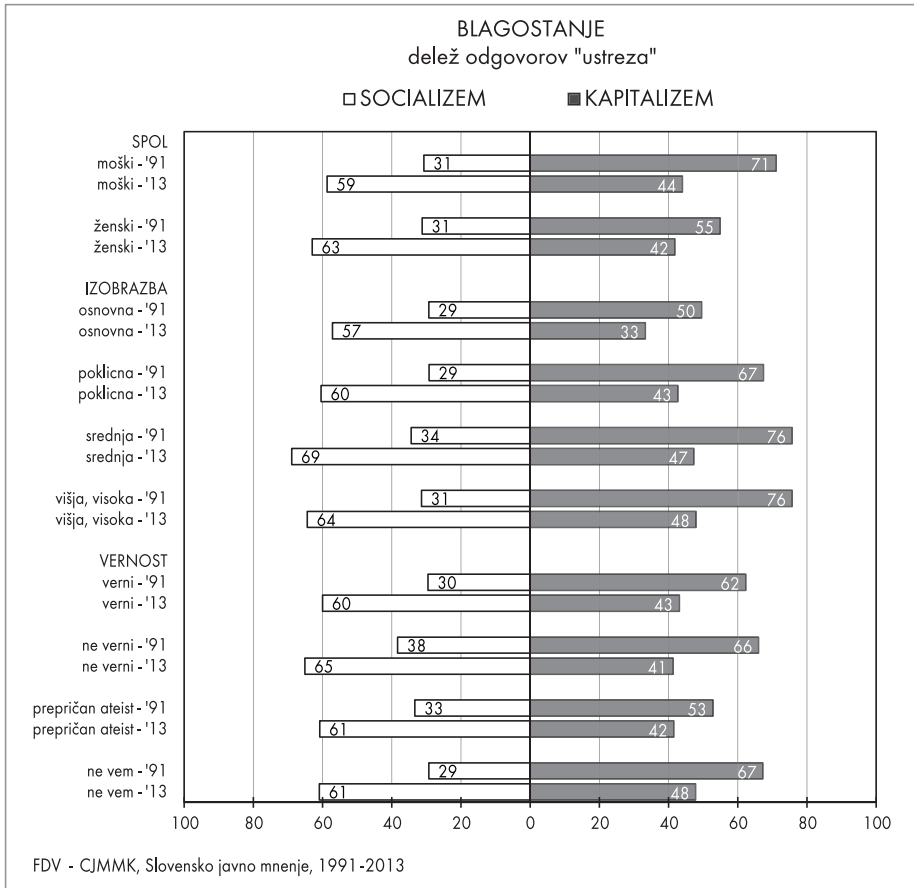
24. V opombi k človečnosti in pravičnosti (23) je pojasnjeno anketno vprašanje, za pričujočo tabelo pa so uporabljeni podatki v zvezi z naslednjimi vprašanji: za neenakost SJM 91/1 – V59cB in SJM 13/1 – S56 (za socializem) ter SJM 91/1 – V59cA in SJM 13/1 – S44 (za kapitalizem); za blagostanje pa SJM 91/1 – V59eB in SJM 13/1 – S57 (za socializem) ter SJM 91/1 – V59eA in SJM 13/1 – S45 (za kapitalizem).

**Graf 3: Ustreznost pojma neenakost socializmu in kapitalizmu glede na spol, izobrazbo in vernost v letih 1991 in 2013 (v %)**



Največji premiki od leta 1991 do 2013 so v ocenjevanju povezljivosti obeh sistemov z blagostanjem: začetna prevladujoča ocena o tem, da blagostanje ne ustreza predstavam o socializmu (polovica vseh), je v zadnji meritvi zdrsnila na slabo četrtino, medtem ko se je hkrati izrazito okrepilo stališče, da pojem blagostanje ustreza predstavi o socializmu (s 30,9 % na 61,1 %). Močno prevladujoča ocena o ustreznosti blagostanja predstavi o kapitalizmu v letu 1991 (skoraj dve tretjini vseh) se je leta 2013 skrčila na raven dveh petin in je praktično izenačena z oceno o neustreznosti pojma blagostanje v predstavah o kapitalizmu. Kot kaže graf 4, ni bistvenih razlik glede na spol, izobrazbo in vernost v okrepitvi pojmovanja, da blagostanje ustreza predstavi socializma: deleži vseh kategorij vprašanih so nad polovičnim. Glede ustreznosti blagostanja predstavi o kapitalizmu pa delež nobene kategorije ni dosegel polovice.

**Graf 4: Ustreznost pojma blagostanje socializmu in kapitalizmu glede na spol, izobrazbo in vernost v letih 1991 in 2013 (v %)**



Obseg sprememb v vrednotenju dveh družbenih sistemov na podlagi tu izbranih indikatorjev kaže, da se v množični zavesti začetna pozitivna predstava o kapitalizmu, ki je spodbujala kritično presojanje socializma, po vsestranskem preverjanju v praksi razkraja, vedno močnejše pa stopa v ospredje ugodna ocena socializma. V zavesti večine se že kažejo prepričljivi znaki polarizacije v dojemanju socializma in kapitalizma. O tem govori tabela 4, v kateri so upoštewane vodilne izbire ocen o (ne)ustreznosti štirih pojmov s predstavami socializma in kapitalizma po podatkih v letu 2013.

**Tabela 4: Ustreznost izbranih pojmov socializmu in kapitalizmu po SJM 13/1.**

2013	SOCIALIZEM	KAPITALIZEM
USTREZA	človečnost pravičnost blagostanje	neenakost blagostanje
NE USTREZA	neenakost	pravičnost človečnost

## 8 Sklep

Četrto stoletje od uvedbe večstrankarske demokracije, ki naj bi prinesla več svobode in napredek, so se v Sloveniji z vidika uresničevanja ekonomskih in socialnih pravic ustvarjale razmere, ki spodbujajo vprašanja o prilaščanju demokracije in tudi svobode. Ta dva eksplicitna cilja, ki sta upravičila zamenjavo družbenega sistema, sta v okoliščinah tržnega gospodarstva vedno bolj skrčena na formo, katere vsebina je bližje potrebam in interesom nosilcev moči in bogastva. Zato se povečuje razmik med pričakovanji in potrebami večine prebivalstva na eni ter realno možnostjo določanja ustreznih pogojev skupnega, družbenega življenja na drugi strani.

Nosilci političnega odločanja, ki bi z institucionalnimi ukrepi lahko spremenili smer razvoja, vedno bolj odkrito delujejo v skladu z neoliberalnimi zahtevami nosilcev ekonomske moči. Posledice takšnega (globalnega) delovanja napeljujejo k oceni, da »že živimo v postdemokraciji, stanju, ko formalni vidiki še obstajajo, resnično odločanje pa že poteka mimo njih, predvsem na relaciji politika-kapital-mednarodne združbe«. <sup>25</sup> Ali, drugače povedano, »demokratske stranke vseh psovod nastopajo kot instrumenti uveljavljanja volje finančnih institucij in družbenih zastopnikov finančnega kapitala«. <sup>26</sup> Zagovorniki obstoječe kapitalistične urejenosti to razumejo kot neko naravno dejstvo, ki se mu preprosto ni mogoče izogniti, treba se mu je samo prilagoditi, kajti za ta red naj preprosto ne bi bilo alternative.

Glede na tako usmerjen razvoj ni presenetljivo, da se je tudi v Sloveniji v času »demokracije« zelo zmanjšalo zaupanje v ključne politične institucije, <sup>27</sup> povečalo pa se je zaupanje v družino in sorodstvo, kar je v skladu z (neoliberalno) individualizacijo odgovornosti za obstoj posameznika in družbe. Dilema, ali je sedanje stanje v slovenski družbi nepredvidena posledica razvoja kot takega in pomanjkanja »vizije« nasploh, se vedno

25. Kot navaja J. Lorenci ugotovitev Colin Crouch v prispevku *Naši poppremierji* (Mladina, 3. 7. 2015, str. 17).

26. Kot ugotavlja S. Tomšič v prispevku *Upor* (Mladina, 3. 7. 2015, str. 22), kjer tudi trdi, da če »drži, da je evropski združitevni proces izključno ekonomski projekt, potem je bila demokracija vseskozi farsa: na videz prijazna grimasa avtoritarnega kapitalizma«.

27. Kot primer lahko vzamemo skrajnost, popolno nezaupanje v državni zbor, ki ga je leta 1991 po podatkih SJM/1 izrazilo 12 % vprašanih, leta 2012 pa 43 % (SJM 12/1); podobno se je okreplilo nezaupanje v vlado (ustrezna deleža sta 13 % in 39 %).

bolj kaže kot umišljena in odvečna. Na podlagi objektivnih indikatorjev o institucionalno determiniranih spremembah (ki so privedle do silovitega naraščanja družbene neenakosti) kot tudi z upoštevanjem subjektivnega zaznavanja teh sprememb, ki kažejo na postopno ozaveščanje o bistvu »normalizacije« družbenega reda, lahko utemeljeno sklepamo, da je zelo jasna vizija razvoja v samostojni državi (vsaj na družbeno latentni ravni) obstajala že pred samo odpravo socialističnega sistema in da ta vizija – ob nedvoumni podpori ali celo prisili Evropske unije – postaja vedno močnejša določilnica bodočega razvoja Slovenije. Realna alternativa sedanjemu stanju je »more but the same« (A. Gouldner), kolikor se ne bo zmanjšala razdalja med večino (producentov vsega razpoložljivega bogastva in sredstev za življenje) in manjšino, ki odloča o prerazdelitvi ustvarjenih dobrin. Ali, drugače povedano, *status quo* se bo v Sloveniji nadaljeval, kolikor bolj se bo krepila asimetrična demokracija<sup>28</sup> kot dekla svobodne tržne ekonomije.

Vzpostavljanje bolj uravnotežene demokracije, ki bi z državno regulacijo odpravljala negativne in družbeno razkrojvalne učinke kapitalističnega reda, je alternativa, ki se je v zadnjem desetletju že ugneznila v zavest kot vodilna,<sup>29</sup> zlasti pri najnižje izobraženih in pri vernih.<sup>30</sup> Treba pa je omeniti, da se je hkrati okrepilo prepričanje o skupni odgovornosti posameznika in države (ki je navzoče pri dobri tretjini anketiranih, nadpovprečno pri višje in visoko izobraženih ter nevernih), medtem ko se je že pičila manjšina zagovornikov popolne individualne odgovornosti še zmanjšala. Vzporedno s to spremembo se je krepilo zavzemanje za »majhne socialne razlike«, kar kažejo podatki merjenj javnega mnenja od leta 1994 do 2013<sup>31</sup> in (zelo) pozitivni odnos do pojma »sindikalne pravice delavcev«. <sup>32</sup>

Vprašanje je, ali lahko v takšni (pre)usmeritvi subjektivnih zavzemanj za več pravičnosti v družbi vidimo predvsem izraz nostalgije po socializmu, s čimer se v javnem diskurzu pogosto (slabšalno) označuje kakršna koli kritična presoja obstoječega stanja in nakazovanje alternativnih rešitev, ki niso po meri vladajoče manjšine. Čeprav naj bi bilo »postsocialistično obdobje /.../ izredno plodno za nastajanje nostalgij« po socializmu (Velikonja 2008: 30), naraščajočega zagovarjanja večje enakosti v Sloveniji ni mogoče celovito pojasniti le s to značilnostjo. Na podlagi sprememb v kolektivni zavesti, ki so v tem prispevku obravnavane v okviru preobražanja strukturno determiniranega okolja, je brez dvoma treba iskati odgovore na vprašanje o povečevanju naklonjenosti bolj egalitarnemu redu predvsem v novih okoliščinah, ki jih v vsakdanjem življenju prisilno doživlja vedno večji del prebivalstva, v neprekinjeni produkciji strahu za obstoj zdaj in v prihodnje. Že prvi vpogled v dinamiko spreminjanja kolektivne zavesti kaže, da se doveznost za

28. Oznaka »asimetrična demokracija« je primerna oznaka za raznolike delujoče demokratične politične sisteme, v katerih je institucionalno zagotavljanje družbene povezanosti po meri (vladajoče) manjšine (opomba M. Jogan).

29. O tem lahko sklepamo na podlagi odgovorov na vprašanje, *kdo je predvsem dogovoren za to, da bi imeli ljudje primeren življenjski standard*. Podatki v dveh meritvah (SJM 06/1 in SJM 13/1 – S 24) kažejo, da se je za primarno odgovornost države odločila približno polovica vprašanih.

30. Ta podatek potrjuje ugotovitvi M. Smrketa o večji naklonjenosti vernih »socialističnemu sindromu« (TiP 2015: 449).

31. SJM 94/2 in SJM13/1 – S 38.

32. SJM 94/2 in SJM13/1 – S 34.

enostransko nasprotovanje socializmu zmanjšuje, zlasti pri tistih, ki še imajo osebne izkušnje s socializmom, medtem ko odsotnost teh izkušenj povečuje odprtost za nevednost in potencialno za dojemljivost sovražnega govora o tem sistemu.

Glede na naraščanje negativnih izkušenj s kapitalističnim redom in vedno večjim nezadovoljstvom z življenjem, zlasti v času krize (po letu 2008), je razumljivo, da je naklonjenost reformnim spremembam družbe, ki je absolutno prevladovala do krize,<sup>33</sup> zamenjalo prepričanje, da je treba z revolucionarno oziroma »odločno akcijo korenito spremeniti celoten način delovanja naše družbe«. Takšno mnenje je bilo do leta 2003 izrazito manjšinsko (deleži so bili pod desetimi odstotki), v letu 2013 pa je postalo prevladujoče, zagovarja ga več kot polovica (57,4 %) vseh odraslih anketiranih oseb. Ta zasuk je povezan tudi z okrepitevijo prepričanja, da »potrebujemo močnega voditelja, ki bi uredil stvari«:<sup>34</sup> delež se je s 45,4 % v letu 1995 dvignil na 55,2 %.

V takšnih razmerah je vedno bolj pereče vprašanje, v katero smer bo krenil družbeni razvoj: ali k povečevanju pravičnosti in družbene enakosti ali pa v nadaljnje razkrajanje institucionalnih temeljev za njuno uresničevanje. Priseganje na prihodnost *per se* ob učinkovitem delovanju (latentne) strategije razvoja prispeva k nadaljevanju obstoječega stanja. Zato vprašanji »demokracija za koga« in »kje so meje neenakosti« ostaja še naprej aktualno tako za raziskovanje družbenih dejstev kot za spreminjanje v praksi.

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33. Med letoma 1992 in 2008 je bilo po podatkih SJM vedno precej več kot polovica anketiranih prepričanih, da so reforme pot do izboljšanja (SJM 92/1 – 54,5 % in SJM 08/1 – 72,0 %).

34. V SJM13/1 (S72) je bila takšna možnost dana v zvezi z anketnim vprašanjem: *Včasih demokracija ne deluje. Kadar se to zgodi, nekateri menijo, da potrebujemo močnega voditelja, ki bi uredil stvari; drugi pa menijo, da je tudi takrat, ko stvari ne delujejo, demokracija najboljša. Kaj vi mislite o tem, ali takrat ...*



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## Viri

Časnikarske vesti in sporočila e-medijev so natančno navedene v opombah.

## SUMMARY

In Slovenia the shaping of the autonomous state meant also the replacement of the socialist system with the capitalist one. The preparing of this change and the strengthening of a new social order has been legitimized through the need for the democratization and Europeanization; but the public discourse, based on the reductionist and dehistoricized approach, has been mostly inspired in the ideology of anti-communism. After the shaping of the multiparty parliamentary democracy in the name of the progress the abolition of everything connected with the socialism began and, in the same time the capitalist free market economy, with the very well-known negative social consequences, was restored and strengthened.

The article represents the changing evaluation of the Slovenian population regarding these two systems, based on the data collected through the longitudinal Slovenian public opinion survey from 1990 to 2013. The data are processed by the descriptive statistics instruments, the results are completed by the interpretation regarding their social structural position and respecting various relevant documents as also activities (particularly those of mass media) that are the most effective producers of public opinion. The treating of the topic chronologically follows the existence of each system, therefore the cognitive interest is firstly directed on the evaluation of socialism.

The analysis takes into consideration general assessments regarding a) the socialist period in general and by time sequences, b) the quality of life before and after the establishing of the independent state, c) the relation to the notions of Europe, socialism and capitalism, which are completed by the respondents' statements on that, how selected four notions (justice, humanity, inequality and well-being) do correspond to their representations (images) on both systems. That in the observed period the beginning relatively positive evaluation of capitalism is weakening and, that at the same time, the positive assessments of socialism are increasing, is the key recognition. This tendency is explainable not only by the nostalgia for socialism, but first of all through the multidimensional personal experiences with the worsening of life conditions for the majority of people.

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**RECENZIE KNJIG**  
BOOK REVIEWS





Tibor Rutar

**Thomas Piketty: Kapital v 21. stoletju. Ljubljana: Mladinska knjiga, 2015. 768 strani (978-961-01-3831-0), 36, 96 EUR**

Verjetno ne pretiravamo, če rečemo, da je kapitalizem ena glavnih analitičnih osi, okoli katere se vrtila sociologija in ekonomija. To ne pomeni, da se sociologija in ekonomija ukvarjata zgolj s kapitalizmom, njegovimi mehanizmi, vzroki, posledicami in pojavi. A motimo se, če mislimo, da kategorija kapitalizma – ali, nekoliko manj natančno, kategorija modernosti – ne leži v osrčju obeh ved, vsaj kot stalna (kontrafaktična) referenčna točka. Če to drži, je precej nenavadno ali celo škandalozno, da je kapitalizem, kot sta ga razumeli ekonomija in sociologija v preteklosti in kot ga razumejo nekatere vidnejše sodobne ekonomske in sociološke paradigme – denimo neoklasična sinteza v ekonomiji ter neowebrovska in konstrukcionistična sociologija –, velikokrat definiran na negotov oziroma nespecifičen način. Bralk in bralcev te revije verjetno ni treba posebej prepričevati, da to počnejo masikateri ekonomisti, ki o kapitalizmu pravzaprav raje sploh ne govorijo, ampak namesto tega uporabljajo bolj nevtralne izraze, denimo »industrijska/postindustrijska družba«. Vendar tudi sociologi, najslavnejše Max Weber, niso povsem zgledni, ko govorijo o kapitalizmu in kapitalu. Obe kategoriji pogosto enačijo s širitvijo trgov in urbanih središč, s poglobljanjem delitve dela, razvijanjem tehnologije in kopičenjem bogastva. V nekem smislu to seveda ni problematično, saj je kapitalizem res povezan z vsemi temi pojavi. Problematično pa je, ker so na tej ravni splošnosti vsi ti pojavi prisotni tudi v nekapitalističnih družbah – gre torej res za specifično kapitalistične pojave? – in ker je točna vzročna povezava med, recimo, širitvijo trgov in kopičenjem bogastva na eni strani ter kapitalizmom na drugi redko jasna. Ali razraščanje trgov povzroča kapitalizem ali obratno? Ali je kopičenje bogastva nujni ali je nemara tudi zadostni predpogoj za vznik kapitalizma? Če je cvetoča komercialna dejavnost eden glavnih kapitalističnih znakov, ali so bile antične trgovske družbe kapitalistične?

Francoski ekonomist Thomas Piketty na prvi strani svojega razvpitega dela *Kapital v 21. stoletju* pravi, da nam v knjigi ponuja »nov teoretski okvir za globlje razumevanje temeljnih mehanizmov«, ki se tičejo kapitala, kapitalizma, neenakosti in moderne ekonomske dinamike. Na tej teoretski podlagi (in s pomočjo svojih empiričnih izsledkov) kasneje predstavi dva »temeljna zakona kapitalizma« (str. 73 in 208) in »bistveno protislovje kapitalizma« (str. 739). Skratka, če naslov njegove knjige ni dovolj jasno sporočal, da se bo ukvarjal s kapitalom in kapitalizmom, nam to ob branju postane zelo kmalu povsem jasno. Pikettyjev namen je v luči zgornjega odstavka vznemirljiv. Tu imamo ekonomista, ki izrecno zavrača marksistične in druge radikalne, izrecno protikapitalistične sentimente, hkrati pa na dolgo in brez sramu piše o kapitalizmu, kapitalu in neenakosti. Progressivni kritiki kapitalizma, ki ne marajo sektaške obskurnosti, v katero je običajno potopljena radikalna protikapitalistična levica, bi morali biti precej navdušeni nad »fenomenom Piketty« – in povečini tudi so.

Vendar vse ni tako enostavno. Piketty kmalu po uvodnem poglavju naznani, da bo besedilo poenostavil tako, da bo izraza »kapital« in »premoženje« uporabljal kot sopomeniki (str. 67). »Materialni in finančni kapital,« pravi, »ki ga v knjigi imenujem preprosto ‚kapital‘, obsega vse oblike premoženja, ki jih ima posameznik (ali skupina posameznikov) načeloma lahko trajno v lasti, prenese lastništvo teh oblik premoženja na druge osebe ali jih menja na trgu« (str. 66). Na prvi pogled se to verjetno ne zdi kaj več kot priročna, nedolžna propedevtična bližnjica, ki bo olajšala razumevanje njegove argumentacije, a v resnici je zelo problematično iz vsaj dveh razlogov.

Prvič, Piketty s to potezo pravzaprav močno spodreže svoj osrednji cilj napisati razpravo o posebej kapitalistični obliki neenakosti in rasti. Namreč, kot kasneje ugotavlja tudi sam, tako splošna definicija kapitala nima nobene posebne zveze s kapitalističnimi družbami zadnjih nekaj stoletij, ki so nasledile predmoderne ali zgodnjemoderne fevdalne, absolutistične in tributarne družbe.

Pikettyjev kapital-kot-premoženje obstaja *od nekdanj*: obstaja »v vseh civilizacijah« in vključuje tako »orodja in obdelavo kmetijskih površin (z ogradami, namakanjem, izsuševanjem itd.) kot tudi prve oblike stanovanjskih prostorov (jame, šotori, kolibe itd.)« (str. 269). Piketty tako nima teorije *kapitalistične* oblike premoženjske neenakosti, kapitalizem pa *ipso facto* projicira nazaj v davno preteklost in ga naturalizira, ovekoveči.

Drugič, Pikettyjeva vseobsegajoča definicija kapitala vpliva na njegove empirične izsledke. To je pomembno, saj svoje definicije kapitala nikjer sistematično ne zagovarja pred drugimi, bolj ozkimi in nemara ustrežnejšimi definicijami, s katerimi bi prišel do drugačnih empiričnih izsledkov – denimo do izsledkov, da v kapitalizmu profitna mera tendenčno pada, ne raste, in da je ta padeč eden ključnih strukturnih vzrokov za sekularno stagnacijo, ki pesti današnji svet in o kateri vse več govorijo celo tako eminentni ekonomisti, kot je Larry Summers. Njegova empirija torej ni tako samoumevna in nedolžna, kot se lahko zdi.

Piketty navkljub svoji vseobsegajoči, nadzgodovinski definiciji kapitala govori o »temeljnih zakonih kapitalizma« in o »osrednjem protislovju kapitalizma«, s čimer sporoča, da so nekatere družbe (kapitalistične) zelo drugačne – *temeljno* drugačne – od drugih (nekapitalističnih). Ta historistična poteza je dobrodošla, vendar žal ni uspešna. Njegov »prvi temeljni zakon kapitalizma« je, kot pravi sam, zgolj tautologija (definicija), »ne zakon«, in to tautologija, »konstrukcija, veljavna vedno in povsod« (str. 213). Njegov »drugi temeljni zakon kapitalizma«, ki pravi, da če je stopnja varčevanja večja od stopnje ekonomske rasti (tj. rasti produktivnosti) in rasti prebivalstva, razmerje med kapitalom in dohodkom narašča, se prav tako ne zdi posebej zgodovinsko omejen in s tem zares *kapitalističen*. Navsezadnje tudi Pikettyjevo »osrednje protislovje kapitalizma«,  $r > g$ , po katerem profitna mera prehiteva stopnjo rasti dohodka, ni veliko drugega kot statistična regularnost, ki ne more biti omejena zgolj na kapitalistične družbe in vzrok katere v vsakem primeru sploh ni razložen.

V knjigi in intervjujih smo izvedeli, da Karl Marx po Pikettyjevem mnenju ni najustreznejša referenca ali celo ena ustreznih referenc za sodobno ekonomsko razmišljanje o kapitalu, kapitalizmu, rasti in neenakosti. Na vprašanje, ali je to res ali ne, tu ne moremo odgovoriti. Lahko pa rečemo, da ne glede na to, kaj si bralka ali bralec misli o številčnosti in resnosti napak v Marxovem in sodobnem marksističnem razmišljanju o kapitalizmu, to razmišljanje za razliko od Pikettyjevega vsaj *poskuša* zajeti kapitalizem in kapitalistične pojave v njihovi (zgodovinski) specifičnosti. Prelom, ki se je zgodil s prehodom iz predkapitalističnih družb (ki so tudi same pomembno notranje razslojene) v kapitalistične, je v resnici epohalen, zato je zelo smiselno ostro pojmovno razlikovati med bogastvom nasploh in *kapitalistično* obliko bogastva, tj. kapitalom, namesto da oba spojimo v sopomenki.

Jasmina Založnik

**Marina Gržinić in Šefik Tatlić: *Necropolitics, Racialization, And Global Capitalism: Historization Of Biopolitics And Forensics Of Politics, Art, And Life*. Lanham, Boulder, New York, London: Lexington books, 2014. 321 strani (ISBN 978-0-7391-9196-5), 70 britanskih funtov**

Kot napoveduje naslov, je primarna okupacija knjige izris nekropolitike (kot paradigmatkega načela vladanja in načela oblikovanja politične moči), izhajajoče iz procesa rasializacije (kot osrednjega ideološkega načela) v globalnem kapitalizmu – ali bolje – reorientacija globalnega kapitalizma, ki od upravljanja življenja drsi v ustvarjanje presežne vrednosti iz smrti. Avtorja knjigo zastavita z ambicioznim ciljem historizacije biopolitike ter forenzike politike, umetnosti in življenja. Natančneje, gre za artikulacijo politike in epistemoloških načel, ki zagotavljajo reprodukcijo kapitala oziroma zasledovanje vzvodov, ki prispevajo k ohranitvi kapitalističnega nadzora ter se uprizarjajo kot depolitizacija njegovih učinkov in ideologij.

Delo, ki je nastalo v soavtorstvu Marine Gržinić in Šefika Tatlića, ni – kot je običajno – zasnovano kot skupen avtorski zapis, temveč kot spojitev samostojnih raziskovalnih prispevkov na isto temo. Dva jezika in dva pristopa se medsebojno prepleteta v rizomatsko strukturiranem besedilu, v katerem je mogoče poglavja razumeti kot platoje, znotraj katerih avtorja markirata osrednje postulate transformacije globalnega kapitalizma. Natančneje, prvi del knjige, ki ga podpisuje Marina Gržinić, se iz poudarjene obravnave procesa rekontekstualizacije (politike) umetnosti po padcu berlinskega zidu (1989) razveja v tematizacijo brisanja zgodovine s premikanjem markerjev in/ali nasilno reartikulacijo (ki je hkrati tudi rekonceptualizacija) družbe kot take. Šefik Tatlić v drugem delu z artikulacijo relacij med državo in družbo, demokracijo in kapitalizmom, zatirane in zatiralca ter posredno dodatnim pojasnjevanjem nekaterih temeljnih premis in konceptov (globalni kapitalizem, hegemonija, ideologija, demokracija – demokratično; politika – politično, normalizacija itd.) predvsem utrjuje teze iz prvega dela knjige.

Tematizacija tega širokega zastavka se vrtniči zgolj okoli dveh besedil, ki sta kot gradnika postavljena odprto in propustno za umestitev plejade drugih konceptov, s katerimi se polje obravnave širi in krepi misel avtorjev.

Osnovana je na besedilu *La movilización global: Breve tratado para atacar la realidad (Globalna mobilizacija: Kratka razprava o napadu Realnosti)* španskega filozofa Santiaga Lópeza Petita in njegove konceptualizacije »Velike transformacije« kot točke prekrija globalnega kapitalizma z realnostjo in transformacijo odnosa med kapitalom in oblastjo v solastniško razmerje. Tak odnos se je formuliral v sedemdesetih letih 20. stoletja in privedel, kot trdi Santiago López Petit, do točke, ko je postal »kapital več kot kapital, ker je oblast«. To razmerje (med drugim) rezultira v politični nevtralizaciji in konceptu nekropolitike, kot ga zasnuje politični teoretik Achille Mbembe v svojem istoimenskem eseju (2003). Omenjena eseja, razširjena in dopolnjena z »ustrezajočimi« referencami, sta v knjigi predstavljena kot gonilna sila Evropske unije (podrobneje ju obravnavata in izpostavljata predvsem 2. in 3. poglavje). S svojo razširitvijo na heterogene spremljajoče koncepte »teles drugačne števnosti in avtorjev, ki konstituirajo 'uporniško' zgodovino« (str. 100) pa ustvarjata poligon, na katerem se vrši (re)artikulacija konceptualnega aparata, ki bi bralcu omogočil misliti drugačno preteklost, sedanost in predvsem prihodnost.

To je tudi razlog, da je knjigo mogoče obravnavati kot glosar, ki se z motrenjem in artikulacijo Drugih pozicij zoperstavlja globalnemu kapitalizmu in »intelektualnemu retardizmu« (Nataša Velikonja). Slednji uteleša prav procese brisanja in potvarjanja zgodovine ter »osvetljuje delovanje liberalnih in humanističnih super-naracij kot procesa normalizacije« (str. XIII) (velikih konceptov postsveta, ki nas poskuša prepričati, da smo opravili z grozotami in nepravilnostmi), ki zamegljujejo vpogled v postopke, skozi katere se (še naprej) vrši razmejevanje posameznikov glede na raso,

spol, razred, državljanstvo itd. Z naslonitvijo na Walterja Benjamina je strategijo črpanja in učenja iz nepriznanih tradicij kulturne izkušnje ter prevajanjem razlik v diskurzivnih kontekstih nenazadnje tudi tisto, kar še zares ustvari zarezo v družbi in s tem potencialno spremembo.

Avtorja tako poskrbita predvsem za niz konceptov, ki jih medsebojno vzporejata in primerjata. Pri obravnavi se nenehno premeščata od splošnejših k bolj specifičnim pojmom in pomenu zamenjave njihovih predpon; (beli) feminizem vstopa v relacijo do disidentskih oblik feminizma in transfeminizma; biopolitika je vzpostavljena v odnosu do nekropolitike; kolonializem in kolonialna matrica moči razkrivata odklon od postkolonializma; sodobni kapitalizem v transgresijah drsi v turbokapitalizem, punkkapitalizem itd.; nacionalna-država se transformira v vojno-državo in rasno-državo; preizprašuje se sprememba pojma Zahod v »nekdanji« Zahod idr. Omenjeni pojmi so dopolnjeni in pojasnjeni tudi z osrednjimi relacijskimi pari politične teorije, kot sta na primer politika – politično in demokracija – demokratično, s katerimi se še dodatno osvetli pomen v zamenjavi predpon in potreba po rekonceptualizaciji pojmovnega aparata, s katerim operiramo. Spremembo analize pa je mogoče doseči, kot menita avtorja, s premikanjem markerjev v sami analizi – namesto obravnave imigranta v središče postavimo pojem državljan.

V tem prizadevanju pisca nista ne dosledna, še manj natančna. Prekomerno črpanje iz različnih virov privede do konceptualne zmede in nejasnosti pri obravnavi bližnjih, a ne nujno tudi prekrivajočih se pojmov. Na drugi strani je knjiga prenapolnjena s ponavljajočimi se definicijami in izpeljavami. *Ad nauseam* seže tako daleč, da se celotni pasusi prenašajo iz poglavja v poglavje, pri čemer avtor(ja) izgublja(ta) bralčevo pozornost. Ponavljanje z razliko je srčika podpisa Šefika Tatlića. Ta si sicer prizadeva, da bi s precizacijo pisave podkrepil svojo argumentacijo, a zaradi pikolovskega razmejevanja bralca izgubi na pol poti. Nasprotno pa s prekomernim parafraziranjem, reformuliranjem in simplificiranjem podanih tez deluje podcenjujoče do bralca in v njem ustvarja odpor. Tudi »ilustrativni« primeri, na katerih sloni predvsem prvi del knjige, zaradi baročne uporabe pridevnikov učinkujejo v nasprotju z zastavljenim ciljem. Na mestih sicer odpirajo možne točke razumevanja »potlačene« zgodovine (na primer poglavje o izbrisanih, avstrijskih beguncih itd.), naslavljajo številna zanimiva vprašanja ter razkrivajo »možne« posledice nekritičnega zapopada in izumljanja novih konceptov ter iz njih izpeljanih diskurzov (kot na primer raziskovalno-umetniško in teoretski projekt »nekdanji« Zahod), medtem ko na drugih s hitro izpeljanimi povezavami in zaključki delujejo dogmatično. Če zaključim, knjigi manjka predvsem dobra uredniška roka, ki bi z grobim posegom v gradivo bistveno prispevala k preglednosti in jasnosti dela kot celote.

A kljub temu da je knjiga *Necropolitics, racialization and global capitalism* daleč od koherentnega dela, ji je treba priznati prispevek h kritični analizi, ki se nekje na robu bori zoper družbeno hegemonijo. Zastopana pozicija je prej izjema kot pravilo, pri čemer izjave ni mogoče lokalizirati, temveč jo je treba ugledati znotraj širšega mednarodnega prostora. Nenazadnje nam s svojim mestom kaže regulativne protokole in ideologijo, na katerih se reproducira »nekdanji« Zahod. Nas torej presenetiti, da je bibliografija, na katero se avtorja v knjigi naslanjata, manjšinsko (če sploh) zastopana v slovenskih knjižnicah?

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Klara Otorepec

**Milica Antić Gaber, Živa Humer, Slavko Gaber, Jasna Podreka, Sara Rožman, Irena Selišnik, Iztok Šori, Veronika Tašner, Pavel Zgaga: Zahtevna razmerja: spol, strukturne ovire in priložnosti. Ljubljana: Filozofska fakulteta, 2015. 201 strani (ISBN 978-237-718-2), 14,90 EUR**

Za zbornik, ki si je za svojo nalogo zadal raziskati in odgovoriti na vprašanje, »zakaj kljub nekaterim strukturnim spremembam, premikom in zamikom, kljub izboljšanju položaja žensk na področju izobraževanja in v profesionalnem življenju, [...] ni prišlo do sprememb tudi v smeri bolj uravnotežene delitve moči in odgovornosti v politiki« (str. 143), se zdi, da prihaja ravno v pravem času, tj. ko se je poleg strokovne, tudi širša javnost začela ponovno zanimati za »pozabljena« feministična vprašanja in nenehna, četudi velikokrat prezrta prizadevanja za odpravo na spolu temelječih neenakosti. Zastavljeno vprašanje pridobi aktualnost tudi zato, ker se zbornik nameni odgovor nanj iskati prav na specifičnem geografskem, kulturnem in političnem področju, torej v Sloveniji. Ta je namreč za razliko od številnih evropskih držav zaradi določenih zgodovinskih socialističnih prizadevanj za enakopravnost spolov in kljub ambivalentnemu odnosu tedanje partije do feminizma kot »meščanske ideologije« na področju enakopravnosti uspela doseči in – v tranzicijskem obdobju – obdržati nekaj temeljnih sistemskih ukrepov (npr. plačani enoletni porodniški dopust), o katerih so ženske na domnevno bolj razvitem, demokratičnem in enakopravnem Zahodu lahko le sanjale.

Zbornik je sestavljen iz več samostojnih člankov (pri avtorstvu prednjači Milica Antić Gaber), avtorji in avtorice pa se pri svojem raziskovanju opirajo na številne empirične podatke, ki jih zajemajo iz nacionalnih statističnih podatkov in preteklih raziskav. Na njihovi podlagi tolmačijo priložnosti in ovire za enakost žensk na štirih poljih: izobraževanje, delo, zasebnost (družina) in politika, s poudarkom na slednjem. Dodatno je zbornik razdeljen na tri dele; prvi se osredotoča na (re)strukturiranje slovenske družbe in vlogo spola kot strukturirane in strukturirajoče strukture, drugi na polje visokošolskega izobraževanja ter povezanosti med visoko izobrazbo in odločitvijo za vstop v politiko, tretji na zakonske mehanizme (predvsem na področju družinske politike) ter vrednostne družbene sodbe do politike same in položaja žensk v njej v slovenski družbi. Ob tem se teoretsko naslanjajo predvsem na Bourdiejev koncept polja (habitusa) in različnih oblik kapitala z raziskovanjem možnosti prenosa slednjega med različnimi polji, ki ga povežejo s Connelleyjevim konceptom spolnih režimov in spolnega reda ter širšim »nacionalnim habitusom«. Pri procesu oblikovanja in spreminjanja slovenske družbe se navežejo predvsem na teoretike postmoderne sociologije, kot so Beck, Giddens in Bauman. V zborniku je prisotno zanemarljivo število feminističnih avtoric, kar je glede na tematiko precej presenetljivo. Sicer dobijo besede v poglavju o družini in delu, a jih pri uvodnem konceptualnem orisu problemskega polja skoraj ni moč najti. S tega vidika se poraja precej pertinentno vprašanje, zakaj je toliko prostora namenjenega npr. razpravam o poznih in tekočih modernah ali družbi tveganja omenjenih sociologov, ki sicer res predstavljajo nekakšen železni repertoar teorij o sodobni družbi, a jih ravno ta železnost postavlja v prepogosto (iz)rabo konceptov, in to celo na področja, kjer njihova opažanja morda niso najbolj relevantna. S tega vidika bi bila odločitev za kakšnega drugega avtorja, predvsem pa avtorico z istega področja vsekakor dobrodošla.

Hkrati se podobna težava pri odmerjanju prostora pojavlja tudi na mestih, ki so namenjena poglobljeni razlagi različnih dejavnikov znotraj posameznih polj, ki botrujejo težjemu uveljavljanju žensk v politični sferi. Razgrnitev dejavnikov je sicer ključna za oris kompleksnega in prepletenega sklopa razlogov, ki so privedli do trenutnega stanja, toda težava je v tem, da je veliko prostora namenjenega zgolj deskripciji stanja, ki pa se obenem uporablja tudi kot interpretacija pridobljenih

statističnih podatkov, ki to »predpostavljeno« stanje seveda potrjujejo. Tako se zbornik na primer premalokrat vpraša po vzrokih znotraj same sfere politike, ki bi segli onkraj že znanih običih mest, kot je na primer prevladujoča politična kultura (politika kot »men's game«) in specifičen družbeni odnos do politike, ki ji vztrajno pada ugled v očeh slovenske družbe (nevstop v politiko kot racionalna odločitev). Več prostora bi tako lahko namenil vprašanju, s kakšnimi težavami se dejansko srečujejo ženske, ki se kljub oviram odločijo vstopiti v politično polje. Tam se recimo pogosto soočajo z diskreditacijo svojih veščin in znanj ravno na podlagi ocenjevanja stopnje njihove ženskosti in ženskenosti (priznavanje veščin ženski je obratno sorazmerno z družbeno ji pripisano stopnjo ženskosti), obenem se od njih pričakuje prevzetje drže in lastnosti, ki veljajo za tipične moške, kar lahko hitro postane izvor nove kritike (prevelika »moškost«). Ambivalentna družbena pričakovanja, ki se vežejo na ženske v politiki, pisci in piske zbornika problematizirajo zgolj na določenih mestih, npr. »Kanjuo-Mrčela (2007) izpostavlja, da je vzroke za diskriminacijo žensk na trgu dela mogoče iskati v tem, da so položaji z največ moči v sodobnih organizacijah zelo maskulizirani, in sicer tako glede spola kot tudi glede pričakovanega sloga vodenja in načinov uporabe moči« (str. 80); »Država je v 'socialističnem obdobju z nekaterimi "ukrepi", kot sta dobro razvita mreža otroškega varstva in celodnevna osnovna šola, sicer do neke mere razbremenila ženske, še zdaleč pa ni odpravila dvojne obremenjenosti oziroma ideološkega razmišljanja in predstave o materinski vlogi žensk' (Kozmik in Jeram 1997: 12–13)« (prav tam); »Razvojni trendi na trgu delovne sile in obnašanje moških glede enakosti in partnerstva v veliki meri ostajajo vpeti v tradicionalne vzorce in prakse ter tako v neskladju s pričakovanji mladih žensk, katerih življenjski vzorci so se v zadnjih desetletjih zelo spremenili« (prav tam); »Ženske, ki že delujejo v politiki, namreč poročajo, da so deležne kritike, če zaradi družinskih obveznosti ne morejo sodelovati na vseh političnih dogodkih, in obenem, da zanemarjajo otroke in družino, če so nenehno prisotne v javnosti (MacKay 2001: 19; McKay 2007: 383)« (str. 99). Če bi zbornik pri interpretaciji rezultatov večkrat poskušal seči dlje kot zgolj do ravni potrjevanja predhodnih ugotovitev ali segel na prej omenjeno problemsko polje, ki vsaj v slovenskem polju še ni bilo pogosto izpostavljeno, bi popravil vtis, da ne prinaša ničesar res novega.

Nerodne so tudi nekatere uporabe terminov, kot je recimo »feminizacija poklicev«. Skozi kontekst je moč razbrati, da gre za pojav, ko v določenem poklicu število žensk prevlada nad številom moških, kar je v grobem sicer res, izostane pa razlaga sekundarnih učinkov tega procesa (npr. devalvacija poklica in zanj potrebnih znanj v očeh javnosti, z izjemo določenih »prestižnih« poklicev, kot je recimo pravo). Pri tem zbornik omenja zgolj enega, in sicer dejstvo, da tudi znotraj t. i. feminiziranih poklicev najvišja vodilna in odločevalska mesta še vedno zasedajo moški. V oči pade tudi način ubesedenja primerjave deleža opravljenega gospodinjanskega dela po spolu, ki ga avtorji in avtorice navajajo pri pojasnjevanju »dvojne obremenjenosti« žensk, tj. zaposlenost z delom v službi in dodatnim neplačanim delom doma, kot enim izmed razlogov za manjšo angažiranost in zastopanost žensk v političnem življenju. Načeloma korektno razlago zmoti uporaba besede »izključenost« (resda samo v opombi), in sicer: »To pomeni, da so moški v Italiji bolj izključeni iz dela v družini kot moški v Sloveniji« (str. 103). Izbira pasivne oblike glagola izključevati vpelje možnost dvomnega branja, da je za moškim opravljanje gospodinjanskega dela onemogočeno zaradi tega, ker jih nekdo namerno izključuje, ne pa zato, ker gospodinjanskega dela na opravljajo, ker naj to delo ne bi bilo skladno z njihovo predpisano spolno vlogo.

Kljub določenim pomanjkljivostim zbornik deluje kot zaokrožena celota, kar je zaradi številnega nabora sodelujočih avtorjev in avtoric pri zbornikih včasih težko doseči. Delno je zaokroženost zagotovo odraz timskega dela raziskovalcev in raziskovalk, saj je zbornik nastal na podlagi rezultatov vnaprej zastavljenega raziskovalnega vprašanja in ne zgolj na podlagi kolažnega nabora različnih člankov. Glede na to, da sodelujoči prihajajo z različnih področij, pa je med drugim tudi dober primer medinstitucionalnega sodelovanja. Slednje je v slovenski znanstveni skupnosti žal prej redkost kot pravilo. Prav tako zbornik ponuja sistematičen in deloma tudi zgodovinski pregled institucionalnih ukrepov in raziskav na področju zagotavljanja enakopravnosti spolov v slovenski

družbi. S tega vidika je bogat vir informacij zakonodajnih sprememb in beleženja prizadevanj za sistemsko ureditev enakopravnosti spolov tako na širši nacionalni ravni kot na ravni posameznih zakonodajnih področij, ki jih obravnava zbornik. Četudi z vidika teoretičnih spoznanj zbornik ni prebojen, je nabor teorij, ki jih uporablja, vseeno moč brati tudi kot opravljanje za marsikoga nehvaležne naloge, da na enem mestu tematsko zbere najpogostejše že znane ugotovitve in tako služi kot izhodiščna točka za nadaljnja poglobljena teoretična branja uporabljenih avtorjev in avtoric. Ob tem mu je tudi treba priznati, da to opravi na dosleden in slogovno lahko berljiv način. Kot sem že omenila, pa avtorji in avtorice poskrbijo tudi za določen prispevek k razpravi s statističnega vidika, ko prikažejo ključne kvantitativne spremembe vključevanja žensk v izobraževalno, poklicno in politično življenje ter – na podlagi mnenjskih raziskav – tudi odraz sprememb širšega družbenega mnenja o primernih spolnih vlogah za ženske. Prav te statistike pa v času, ko se – kot odgovor na novo vidnost feminističnih prizadevanj – del javnosti tudi z uporabo statističnih podatkov trudi prikazati, da so (vsaj formalne) neenakosti med spoloma odpravljene, služijo kot dokaz, da ni tako, ter tako terjajo nove rešitve in odgovore na vprašanje enakosti spolov.

Neven Polajner

**Bogomil Ferfila: Rusija in Putinov kapitalizem. Ljubljana: FDV, 2015.  
427 strani (ISBN 978-961-235-698-9), 39 EUR**

Monografija avtorja dr. Bogomila Ferfile *Rusija in Putinov kapitalizem* nudi obetaven naslov o političnih in ekonomskih procesih v geografsko največji državi na svetu, ki je v mednarodnem prostoru dvignila veliko prahu s tem, ko si je 18. marca 2014 pripojila ukrajinski polotok Krim. Temu so sledili tudi oboroženi spopadi in kriza na vzhodu Ukrajine, kjer pretežni del tam živeče populacije tvori rusko prebivalstvo. Vse omenjeno je vodilo do največjega zaostrovanja odnosov med Vzhodom in Zahodom po koncu hladne vojne. Posledica omenjenih dogodkov je tudi dejstvo, da je temam, ki se v najrazličnejših pogledih nanašajo na vprašanja, povezana z Rusko federacijo, enormno zrasla priljubljenost. Potem ko je prva in največja (bivša) socialistična država na svetu sistem državnega socializma nadomestila z neoliberalnim kapitalizmom in liberalno demokracijo in ko se je na prelomu tisočletja pričela čutiti potreba po vse temeljitejšem premisleku o aktualnem družbenem konsenzu glede obstoječih političnih in ekonomskih razmerij, je globoka analiza konceptov, povezanih z demokracijo in kapitalizmom, še toliko bolj zaželeno. Posebej v povezavi z državo, pri kateri odraz temeljitih notranjih družbenih sprememb le redko ostane izključno znotraj njenih meja.

Delo se prične v obliki konglomerata, ki združuje geografske značilnosti ter zgodovino nastanka in konstituiranja ruske države, hkrati pa vključuje tudi nekatere potopisne elemente. Pri tem posamezna poglavja služijo kot izhodiščni vir informacij o nekdanjem carskem glavnem mestu Sankt Peterburgu, vzhodnoevropskem delu Rusije ter zahodni ruski enklavi Kaliningrad skupaj z njeno zgodovinsko, geografsko in geopolitično umestitvijo. Sledita obsežno poglavje o ruski Antarktiki in še obsežnejše o ruski Arktiki, ki skupaj tvorita skoraj polovico knjige. Glede Arktike delo nudi razmeroma izčrpen geografski in etnografski opis, skupaj s predstavitvijo njene vojaške in obrambne vloge. Poleg strateške vloge je izpostavljeno pomembno vprašanje jedrskih poizkusov, nesreč in odlaganja jedrskih odpadkov, ki so tudi sicer v največji meri vezani ravno za to geografsko območje. Predstavljen je še gospodarski vidik področja ter vloga tamkajšnjih naravnih bogastev in energentov. Poglavje o ruski Antarktiki hkrati obsega predstavitev raziskovalnih postaj, ki se tam nahajajo, skupaj z raziskovalnimi programi in značilnostmi. Lahko trdimo, da sta ti dve poglavji najbolj izvirni in prinašata delu dodano vrednost, saj je na to temo v odnosu do ostalih tem, ki se navezujejo na Rusijo ter njene družbene in politične razmere, na voljo precej manj literature; še zlasti, če smo osredotočeni na slovenski jezik.

Ruska tranzicija je skupaj s tranzicijo ostalih vzhodnoevropskih držav predstavljena v obliki okvirnega opisa, ki nudi osnovni vpogled v razmere devetdesetih let prejšnjega stoletja. Vendar pa zaradi širine in obsežnosti teme ter velikega števila v delu zajetih področij v večji meri ne obsega tudi poglobljenih in večdimenzionalnih analiz. Delo tako vsebuje obsežen nabor različnih podatkov, ki so predvsem ekonomskega značaja, in zato z ekonomskega vidika tudi razmeroma dobro prikaže razmere v Rusiji po razpadu Sovjetske zveze. V zadnjem poglavju je knjiga obogatena z različnimi uporabnimi statističnimi analizami in primerjavami Rusije z ostalimi bivšimi socialističnimi državami v Evropi, kar spremljajo kratke pripadajoče interpretacije. Pri tem pa vseeno opazimo, da je večina političnih in družbenih procesov interpretirana skozi ekonomske podatke, značilnosti in paradigme. Tako na primer bralec s poglobljenimi politološkimi in družboslovnimi pričakovanji trči ob sicer dobrodošel ekonomski prikaz določene situacije, kateri pa manjka ustrezna poglobljena politična dimenzija oziroma – z drugimi besedami – velikokrat gre za sklepanje »z ekonomskega na vsesplošno družbeno«. Pri tem pa je tisto, kar politologi definiramo kot politično, velikokrat spregledano. Namesto tega se pogosto – kot rezultat interpretacije ekonomskih razmer – pojavljajo le enostavni zaključki. Tako je na primer, ko govorimo o centralizmu in razmeroma avtoritarni

oblastni strukturi ruske države, treba vedeti, da se je legitimnost oblasti v Sovjetski zvezi napajala iz podobne oblastne strukture, kot je bila praksa v njeni predhodnici carski Rusiji. Podoben prenos vzorca bi lahko ugotavljali tudi v Putinovi »tretji Rusiji«, ki (za zdaj) uspešno združuje simbola rdeče zvezde sovjetskega socializma in zlatega orla ruskega carstva.

Delo v okviru ekonomske oziroma ekonomsko-politične dimenzije nudi ustrezno opredelitev razmerja med Rusijo in državami Vzhoda, pri čemer velja še posebej izpostaviti Kitajsko in Japonsko. Prav tako je dobrodošla tudi naknadna dodatna ekonomska primerjava med Rusko federacijo in Ljudsko republiko Kitajsko. Tu gre predvsem za statistično primerjavo obeh zelo pomembnih globalnih akterjev, kjer pa na primer lahko pogrešamo tudi komplementarno razumevanje njihovih odnosov. V vse bolj kompleksnem in globaliziranem svetu ne gre več toliko za to, kdo izmed obeh je v tekmovalni prednosti na posameznem (bolj ali manj ekonomskem) področju, temveč je vse bolj pomembno razumeti, kaj pomeni, če oba akterja skleneta zavezništvo in se na področjih, kjer sta dominantna, pričneta tudi ključno dopolnjevati. Metaforično to lahko ponazorimo kot sintezo med »enormnimi zalogami zemeljskega plina in naravnih bogastev na eni strani in skoraj neskončno produkcijo blaga široke potrošnje na drugi strani«. Tu bi bilo hkrati smotno izpostaviti še vprašanje prihodnosti povezovanja držav BRICS-a (Brazilije, Rusije, Indije, Kitajske in Južne Afrike) ter analizirati njihove realne možnosti.

Poleg že omenjenega je v delu izpostavljeno še vprašanje ruske politične tranzicije in političnega sistema. Vsebovan je dober in pregleden prikaz strankarskih akterjev v obdobju vse od začetka obstoja samostojne države. Kljub temu pa (v večji meri) ne gre za presežek golega naštevanja političnih inštitucij in pri tem preštevanja števila poslancev v času posameznih političnih mandatov. Vseeno pri prebiranju naletimo na razmeroma temeljit numerični povzetek uspehov Vladimirja Putina in njegove stranke na volitvah, skupaj s predstavitvijo drugih pomembnih političnih akterjev. Vse omenjeno lahko služi kot koristen pripomoček za usmeritev pri pripravi poglobljenih ter bolj fokusiranih političnih in drugih družboslovnih analiz. V okviru razumevanja političnega sistema je ponujen še zelo kratek izhodiščni premislek o demokraciji. Ta se sicer na začetku obetavno dotakne vprašanja poimenovanja političnih sistemov, vendar pa se hitro prelevi v ponovno interpretacijo statistik. Zato sicer lahko služi kot suplementarni vir dodatnih informacij bralcu, ki ima o izhodiščni temi že izoblikovano razmeroma jasno predstavo in pri tem že razpolaga z zadostno mero znanja o ruskih (ter splošnih) družbenih in političnih procesih.

Izhodiščni pojem *kapitalizem* je razumljen predvsem v čistem ekonomskem smislu, zahteven bralec pa pri tem lahko pogreša temeljito analizo in umestitev fenomena v ruski ter tudi širši družbeni in politični kontekst. Če smo natančnejši – gre za odsotnost presežka razumevanja kapitalizma samo v goli tradicionalni ekonomski formi kot prostega tržnega gospodarstva. Manjka namreč pridih politične dimenzije kapitalizma, ki izhaja iz same narave kapitalistične države. Sem sodi na primer opredelitev njene vloge politične selektivnosti, demokratične legitimacije, vprašanja racionalnosti, funkcijskih problemov politično-administrativnega ravnanja, zmožnosti in nezmožnosti vladanja, ideologije in podobno. Na kratko torej dimenzije, ki bi zastopala kritično in inovativno pozicijo do obstoječih konvencionalnih ekonomskih, političnih ter ostalih družbenih razmerij in paradigem. Naj se navežemo še na drobno pomanjkljivost v tehničnem smislu – glede na to, da delo v geografskem smislu pokriva ogromno ozemeljsko območje, ki je bilo v preteklosti deležno korenitih družbenih sprememb, bi bilo veliko pregledneje, če bi bile posamezne interpretacije (poleg tega, da so podkrepjene z odličnimi statističnimi preglednicami) dodatno opremljene tudi z ustreznim kartografskim prikazom. Kljub vsem izpostavljenim prednostim in kritičnemu premisleku o dimenzijah, ki bi sicer zajeten vir podatkov o *Rusiji in Putinovem kapitalizmu* naredile še boljše, je delo brez dvoma dobrodošel prispevek vsemu, kar o tem ogromnem prizorišču družbene in politične pestrosti že vemo in česar se moramo še naučiti. Naj pri tem omenimo, da je obravnavano delo dobrodošlo dopolnjevati z dodatnimi, bolj teoretsko utemeljenimi deli, ki iz opisnosti prehajajo v razlagalnost. Šele takšna osnova lahko služi kot temelj za resno znanstveno raziskovanje znotraj začrtane teme.

Andrej Kirbiš

**Rudi Rizman: Odrpte sociološke agende – globalizacija, demokracija in intelektualci. Ljubljana: Znanstvena založba Filozofske fakultete, 2014 (Zbirka Razprave FF). 187 strani, (ISBN 978-961-237-720-5), 14,90 EUR**

Knjiga *Odrpte sociološke agende – globalizacija, demokracija in intelektualci* je še ena publikacija prof. Rudija Rizmana, ki podaja poglobljen, predvsem pa kritičen vpogled v temeljna odprta vprašanja sociološke in širše družboslovne analize sodobne družbe. Knjiga je razdeljena na štiri tematske sklope. V prvem avtor obravnava globalizacijo, ki je eden najpogostejše obravnavanih, a kljub temu (ali pa ravno zato) razmeroma slabo razumljen pojem. Avtor opozori na spodbudne korake, ki jih je sociologija naredila pri obravnavi globalizacije, predvsem z osredotočanjem na strukturne vidike globalizacije (s poprejšnjega fokusa na analizi procesov), z obogatitvijo konceptualnega repertoarja (npr. s pojmom »glokalizacija«) ter s prehodom iz tradicionalnega metodološkega nacionalizma k metodološkemu globalizmu. Čeprav nacionalna država še vedno igra pomembno vlogo, je slednja od nastopa globalizacije bistveno drugačna, to pa terja tudi novo (odprto) raziskovalno paradigmo. Avtor v tem okviru predstavi ključne sociološke teorije, ki obravnavajo globalizacijo. Že v tem sklopu ponudi tudi jasno izhodiščno vlogo, ki naj bi jo igrale sociologija in druge družboslovne vede skupaj s humanističnimi – prispevale naj bi »tisto javno dobro, brez katerega ni ali ne bi bilo mogoče govoriti o demokratični družbi«.

Drugi tematski sklop bolj poglobljeno obravnava demokracijo, predvsem v odnosu do aktualne globalne krize. Avtor najprej ponudi vpogled v nekatere dimenzije krize, ki je nastopila leta 2008, in se dotakne glavnih razlogov zanjo, nato pa kritično obravnava ekonomiste, ki krize ne le da niso napovedali (razen nekaterih redkih izjem), ampak so k njej (ne)posredno tudi prispevali. Sklep, ki sledi, ni presenetljiv: iluzorno bi bilo pričakovati, da bi nas iz krize pripeljali (ti isti) ekonomisti – fundamentalistični zagovorniki prostega trga, ki so javno zagovarjali idejo, da je na področju ekonomije (državna) regulacija odveč. K problemu je po avtorjevem mnenju med drugim prispevala tudi matematizacija sodobne ekonomske vede, za katero se nemalokrat skrivajo problematične teoretične predpostavke, poenostavljeni modeli razlag ekonomskega življenja in, morda ključno, pristranski ideološki pogledi. Iskanje vzrokov krize, predvsem pa njene odprave je za avtorja posledično interdisciplinarni problem, ki zadeva poleg ekonomistov tudi sociologe, politologe, zgodovinarje idr. Potrebna je nova ekonomska paradigma, saj s starimi, očitno družbeno škodljivimi pristopi ni mogoče reševati težav, ki so pripeljali do njih. Odločujoči prispevek h krizi pa gre pripisati političnim elitam, ki so bile zainteresirane za omenjene ekonomske »analize«. Skratka: akademski oportunistem in konformizem priklanjanja neokonservativizmu (oz. neoliberalizmu) je imel za posledico prevlado mikroekonomskih teorij nad makroekonomskimi, kar pa je nujno vodilo k izgubi makropogleda nad ekonomskimi procesi (če samo spomnimo – praktično ne mine teden, da ne bi kak predstavnik (slovenske) politične elite v medijih izrekel zguljene fraze, da se država ne more (več) zadolževati, ker tudi vsaka gospodinja ve, da lahko gospodinjstvo porabi le toliko, kolikor je na voljo!).

Avtor že v prvem sklopu v okviru analize odnosa med globalizacijo in demokracijo opozori na paradoks – globalizacija je prispevala k širjenju demokracije po svetu, po drugi strani pa se demokratično odločanje ni zasedrilo v tistih ustanovah, ki so pravzaprav najmočnejše in najvplivnejše. V tem kontekstu je kritičen do nadnacionalnih ustanov (Mednarodni denarni sklad, Svetovna banka, G8 ipd.), katerih odločitve imajo posledice za ves svet, četudi nimajo demokratične legitimnosti, prav tako pa za svoje pogosto zgrešene odločitve ne odgovarjajo praktično nikomur (str. 63). V drugem sklopu avtor razpravlja o še nekaterih ustanovah brez demokratične legitimnosti – agencijah za oceno bonitet držav, ki neposredno vplivajo na življenje milijard ljudi po svetu. Spomni tudi, da

se je v času krize še okrepila perverzna logika, ko prihaja do trendov *socializacije finančnih izgub* bogatih ob siceršnji *privatizaciji njihovih dobičkov*, povečevanja dohodkov korporacij in vodilnih kadrov, katerim so se dohodki v času krize še povečali, ob siceršnjem povečanju neenakosti v dohodkih in premoženju kot posledici uvajanja ekonomskih »reform«, predvsem v obliki »zategovanja pasu«.

V tretjem delu se Rizman loti vloge intelektualcev v sodobni družbi, ki so bili po demokratičnih tranzicijah v postkomunističnih družbah pogosto potisnjeni na rob, četudi so pomembno prispevali k ukinitvi enostrankarskih oblasti. Avtor poudarja predvsem pomen »nekonformističnih« intelektualcev, ki so se jih avtoritarni vladarji nemalokrat bali še bolj kot »zunanjega sovražnika«. Spomni, da so raziskave javnega mnenja v Sloveniji v šestdesetih letih prejšnjega stoletja pokazale, da je izobraženi sloj (intelektualci) užival visok ugled, celo višjega kot oblastniki, kar je imelo številne posledice (nenazadnje tudi zahtevo Centralnega komiteja po kazni odgovornega za takšno raziskavo). Rizman se strinja s tistimi misleci, ki intelektualce vidijo kot nosilce »nerevolucionarne« oz. »evolucijske« revolucije, o njih pa razpravlja tudi v kontekstu uporniških aktivistov oz. civilne družbe, ki je bila ključna za realizacijo mobilizacijskega potenciala v smeri prehoda v demokratični politični sistem. Težave za intelektualce so po padcu berlinskega zidu predstavljali številni dejavniki, med drugim tudi (ne)uspešno vključevanje v rutino strankarske politike, v primeru vključevanja pa posledična izguba ugleda (nekdanjih) intelektualcev. Intelektualci so po padcu nedemokratičnih režimov dobili občutek, da na vidiku ni novih zgodovinskih tem in sovražnikov, zoper katere bi se borili. Avtor v isti sapi poudarja, da so danes izzivi za intelektualce (lahko) še večji kot v preteklosti; kot primer navaja nadzor in zapiranje pomembnih družbenih sfer, do česar danes v primerjavi s komunističnim obdobjem prihaja na mnogo bolj prefinjene načine, pod krinko demokracije in svobodnega trga. Avtor tako spomni, da v sodobni družbi in trenutnih kriznih razmerah morda bolj kot kadarkoli prej potrebujemo kritično mišljenje in »družbeno mobilizacijo intelektualnih energij«; v nasprotnem primeru – še posebej ob upoštevanju okoljskih razmer – človeštvo čaka kataklizma.

Četrti, sklepni del knjige je namenjen obravnavi vloge humanistike v globalni hegemoniji neoliberalizma. Avtor priznava, da se pri opisih humanistike pogosto omenjata besedi »kriza« in »zaton«; razlogi za to so kompleksni, mednje pa gre uvrstiti tudi marketizacijo univerz iz tipa Humboldtove raziskovalne univerze v t. i. neoliberalno »McUniverzo«, kjer se univerza prilagaja ustroju korporacij in komercialnemu etosu. K degradaciji humanistike je prispevala tudi marginalizacija filozofije, eno izmed rešitev pa lahko predstavlja tudi interdisciplinarna integracija, kjer se filozofijo in humanistiko poveže s (tehnično) znanostjo. To se po avtorju mestoma že dogaja; primer je harvardska univerza, ki študentom ponuja predmete (tudi) iz humanističnih ved, podobni primeri pa obstajajo tudi v realnem sektorju, saj ima v nekaterih državah že okoli tretjina vodilnih v največjih korporacijah tudi diplomo humanističnih ved. Humanistika je po Rizmanu ključna za blaginjo v sodobni družbi – za velike družbene neenakosti in revščino sta namreč pogosto (so) odgovorna pomanjkanje empatije, občutka za pravičnost (slednje so tudi bolj primerni kazalci stanja civilizacij kot pa kazalci bor(z)nih tečajev), brez humanistike in posledično njenega prispevka k ustvarjalnosti in »lepemu« pa bi bila družba bistveno osiromašena.

Knjiga *Odprte sociološke agende – globalizacija, demokracija in intelektualci* je pomemben prispevek k razumevanju ključnih vprašanj, s katerimi se danes srečujejo družboslovne in humanistične vede. Bralec si (ravno zaradi tega) ob prebiranju mestoma zaželi še dodatno razdelanega avtorjevega pogleda na slovensko družbo – če ne že poglobljenih analiz slovenske družbe (kar ni bil namen pričujoče knjige), pa morda katere izmed štirih v knjigi obravnavanih tematik. Zanimiv bi bil npr. avtorjev poglobljen komentar na civilno družbo v Sloveniji (npr. v času krize), ki je – kot vemo iz številnih preteklih meddržavnih primerjalnih raziskav – vsaj na ravneh vključevanja njenih državljanov v okvir državljanke participacije sorazmerno nizko aktivna. V vsakem primeru pa lahko sklenemo, da avtor v svoji knjigi ne podaja le prepričljive sinteze pogledov nekaterih ključnih družboslovnih avtorjev na osrednje probleme sodobne družbe ob vključevanju lastnih refleksij,

ampak s svojo tenkočutno analizo odstira nekatera do sedaj še ne obravnavana področja družboslovja. Obenem pa je morda ključni prispevek knjige avtorjevo zastavljanje vprašanj, ki bi se jih družboslovci in humanisti morali lotiti, ko obravnavajo pereče tematike življenja v globalni družbi in ko preizprašujejo svojo vlogo pri njihovem razreševanju.