

ARTICLE

The Bilingualism Bonus in Socialist Slovenia: Domestic Policy or Diplomatic Prestige?

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Abstract

The objective of the article is to establish why a financial bonus for Slovenian–Italian bilingualism was introduced in the District of Koper (comprising today’s Slovenian municipalities of Ankaran, Koper, Izola and Piran), which came under Yugoslav rule after 1954. Using Brubaker’s triadic nexus concept and analysis of newly discovered archival sources, the authors found that (a) on the federal level, Yugoslavia only focused on minority protection as much as it was required to by international agreements and treaties, (b) the Italian minority itself was not a relevant actor in the Yugoslav system of minority protection, (c) Italy had a marginal role in the process of protecting the Italian minority in Yugoslavia, and (d) the political elite in Yugoslavia introduced the bilingualism bonus to encourage the integration of the Italian minority when building a new (socialist) sociopolitical order. The Slovenian–Italian bilingualism bonus was therefore not an altruist measure directed at minority protection, but rather a self-serving measure by the authorities to reinforce their power.

Keywords: Slovenia; Italy; minority protection; Yugoslavia; socialism; bilingualism bonus

Introduction and the Research Problem

The objective of this article is to establish why a Slovenian–Italian bilingualism bonus as an issue of Italian minority protection (hereinafter BB) was introduced in the District of Koper,¹ which came under Yugoslav rule after 1954.

The BB is an instrument for achieving the objectives of specific public policies (Gazzola and Grin 2017). It is a public-sector financial incentive calculated to encourage its recipients to use a minority language in their work, thus enabling minority members to use their language in official matters, giving them a sense of heightened protection, and making them feel more welcome and accepted (Rossi, Lipsey, and Freeman 2004). Although political science has developed myriad tools for explaining the formation, development, and evaluation of public policies (Rossi, Lipsey, and Freeman 2004; Weimer and Vining 2014), the reasons for the introduction, development, and evaluation of BBs remain relatively poorly researched (Ricento 2006). Most studies of language policies that are directed at supporting and promoting the use of minority languages in different European countries focus on evaluating the current state of affairs and less so on designing and exploring the broader social reasons, motives, and goals for introducing incentives to boost specific language policies (Grin et al. 2003; Novak Lukanovič 2011; Gazzola et al. 2016; Laakso et al. 2016). Existing research thus sees BBs as self-evident, failing to explore the reasons behind its introduction. It has moreover been evaluated mainly through the lens of its economic component (effectiveness)

and less from the perspective of its political, social, and cultural influence. Our research will therefore particularly focus on the reasons for its introduction.

Alongside this macro-level research, there is a corpus of studies dealing with BBs at the micro level, specifically with respect to the needs of the individual/user—either the recipient of the BB or the person benefiting from better services due to the BB (cf. Weibel, Rost, and Osterloh 2010). Therefore, Vandenebeele (2007) analyzed the intrinsic and extrinsic motivation of public servants in relation to BB, Frey (1997) focused on the nature and structure of incentives in the workplace, and Kübler (2013) took on the issue of incentives in public administration and examined “representative bureaucracy” and “representative public administration,” which should reflect the diversity of the constituent parts of a society. Of course, more research on the topic was conducted in multilingual countries (for Canada and Switzerland, see Kübler, Kobelt, and Andrey 2011; Turgeon and Gagnon 2013; Gazzola 2016; for Wales, see Evas and Cunliffe 2016), but all of these articles mainly focus on the conceptualization of the BB, its functioning, and its effectiveness.

The thesis we wish to test in this article pertains to the reason(s) for the introduction of the BB in the District of Koper. We believe there could be two reasons for the introduction of the BB: (1) an external or *altruist* one and (2) a domestic or *selfish* one (Figure 1).

Even though the above reasons are presented as part of a purified model, real life rarely limiting itself to only one, we presume that Yugoslavia/Slovenia introduced the BB mainly for (selfish) reasons of domestic policy. This is partially confirmed by the statement given by Vlado Majhen, a member of the Executive Committee of the Slovenian Communist Party’s (ZKS) Central Committee, claiming that “minorities can be a factor of convergence with neighbouring countries” and that “minorities can be an important player [in the formation of the socialist state—comment added by authors] as long as they are constantly involved in labour and social governance.”² For Majhen, minorities were not an independent entity but always in some sort of relational position—to external factors and actors (neighboring states), or internally, to the political system.

Our thesis will be tested by compiling different methods. The main method used will be a critical analysis of primary (archival) and secondary (books, chapters, data, etc.) sources, which will represent the framework of the research. Our theoretical starting point will be Brubaker’s (1993, 1995, 1996) *triadic nexus*. But because we are primarily interested in the reasons for the introduction of the BB, we will expand the *triadic nexus* and its derivations using a comparative critical analysis of primary sources from the Archives of the Republic of Slovenia, or official publications of the District of Koper, official documents of the Socialist Republic of Slovenia, and session transcriptions of the Assembly of the Socialist Republic of Slovenia. Until today, these sources

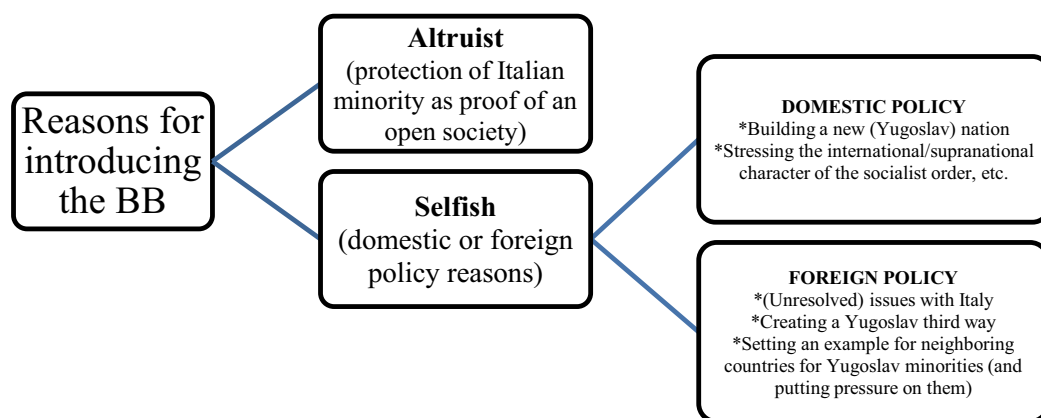


Figure 1. Yugoslavia’s reasons for introducing the BB.
Source: Author’s illustration.

have neither been analyzed nor presented in the Slovenian or broader international context. Because the reasons for the introduction of the BB are highly important not only for Yugoslav–Italian relations but also for the theoretical value of minority protection, we believe the presentation of findings from these sources gives this article even more added value.

The article is divided into two parts: theoretical and empirical. The introduction is followed by the theoretical part, which presents the framework for the empirical analysis of the BB introduction in the District of Koper. The article ends with a discussion and conclusion, explaining the basic findings, evaluating the thesis, and outlining possible related areas for future research.

The Yugoslav System of Minority Protection and the Position of the Italian Minority in Yugoslavia 1945–1990: A Theoretical Framework

There is still a lot to learn about minority protection in Yugoslavia for the following three reasons. First, declarative/outspoken commitments made by Yugoslavia were often divorced from reality. It is therefore almost impossible to evaluate to what extent the declared minority protection commitments were translated into practice. The foreign public was often told that Yugoslavia cared about minorities, with politicians simultaneously stressing that the protection of minorities in Yugoslavia is not an activity per se but rather part of integrating minorities into the new—socialist society, defined by the “international³ spirit of Yugoslavia [...] in which there are no privileged and deprived minorities” (see Bebler, 1960, 10–11).

The second reason is mostly connected to how the term minority was understood in Yugoslav society. Usually, a minority was understood to designate a community that speaks a different language from the majority. This is confirmed also by Bebler⁴ (1960, 15). In his lecture for the Austrian Society of Foreign Policy and International Relations (*Österreichische Gesellschaft für Aussenpolitik und Internationale Beziehungen*), he highlights the following:

In the Federal Assembly, as in the Assemblies of the Republics and in the lower-level public authorities, **each deputy can use its mother tongue** and it is translated into one of the **Yugoslav languages** (Serbo-Croatian, Slovenian or Macedonian). Members of minorities can use their native language in public if they **do not know the language of the majority**. [emphases added]

Although Bebler in his note states that minorities have the right and possibility to use their language, this was not so in everyday practice. Yugoslav national *exclusivism* (as opposed to *inclusivism*) is apparent in the last sentence of Bebler’s speech, where he highlights minority languages as being “second best,” used only in cases when somebody does not speak the language of the majority.

The third reason lies in how Yugoslav decision makers perceived individual minorities in terms of relevance—that is, which minority was really relevant. In Yugoslavia, the only relevant minority were the Albanians. This can be seen in Bebler’s expose (1960, 8, 11, 18ff) and also in some official statements, like the one from the VI Congress of the League of Serbian Communist, highlighting that “around three-quarters of all minority members of Yugoslavia live in the Socialist Republic of Serbia”; [...] “special emphasis relating to this topic concerns the regions of Kosovo and Metohija” (Stefanović 1982, 37) [where the majority of citizens are Albanians—comment added by authors].⁵ The understanding of Albanians as the major Yugoslav minority issue is likewise confirmed by Komac in 2023⁶ declaring that

[w]ithout acknowledging the political stance towards Albanians, we cannot understand the system of minority protection in Yugoslavia, neither its lack of structure, ad-hocness, tailor-made [organisation], and fractured nature

and emphasizing that

Yugoslavia had no uniform approach to different minorities. The federal structures dealt mostly with the issue of Albanians, while states were entitled to define the level of minority protection afforded to other minorities by themselves. That is why you have different approaches to minority protection for Hungarians in Vojvodina, Croatia, and Slovenia; for Italians in Slovenia and Croatia; etc. Finally, it could be said that Yugoslavia created its own system of minority protection where declarative commitments were sometimes far removed from everyday practice, [the country] frequently eschewing its national and international obligations.⁷

The above-mentioned facts and the complexity of Yugoslav–Italian relations partially explain the lack of research focusing on the position of the Italian minority in Yugoslavia from the historical and socioeconomic-cultural point of view, a topic that has been exciting more interest “only” in the last 20 years.⁸

Studying the Italian minority in Yugoslavia and the Yugoslav reaction to its existence can best be explained using Brubaker’s (1993, 1995, 1996) three-pillar approach to analyzing minorities, which he calls the *triadic relational nexus*. According to him, the “national question” in Europe is a triangular nexus between “national minority, nationalizing state, and external national homeland” (Brubaker 1993, 6). In his model, Brubaker (1993, 10) underscores the importance of seeing minorities as dynamic. He points out that a “national minority is not something that is given by the facts of ethnic demography, [but] a *dynamic political stance*.” A minority can therefore be understood as a *policy entrepreneur* (Mintrom, 2019), reshaping itself according to its own criteria and with specific demands from the majority. At the same time, the political elite of the state must answer these demands to ensure the coherence of its own state form (Brubaker 1995, 112–113).⁹ The term *nationalizing state* refers to the state where a particular minority lives. This state is ethnically heterogeneous (whether authorities officially recognize this or not), and a relationship between the majority ethnic group and minority ethnic group(s) is established. The third element of the *triadic nexus* is the *external national homeland*, sometimes also called the *kin-state*.¹⁰ As Brubaker (1995, 117) states, the external national homeland is the state “responsible [...] for its ethnic co-nationals who live in other states and possess other citizenships.” In the case of the Italian minority in Yugoslavia after 1954, the components of the *triadic nexus* would be the following: (1) *the minority* is the ethnic group of Italians that remained in Yugoslavia after 1954, (2) *the nationalizing state* is Yugoslavia (after 1991, Slovenia and Croatia), and (3) *the external national homeland* is Italy.

Brubaker (1993, 1995, 1996) also highlights another characteristic of his triadic structure—its *relational status*, or rather “relation between relational fields” (Brubaker 1995, 118), which moves the entire model from a static to a dynamic one. Precisely this understanding allows us to analyze the reasons and changes in the attitude of the Yugoslav authorities toward the Italian minority in Yugoslavia. Static models could not explain this and would require a case study. But if we analyze Brubaker’s model closely, we can see that it not only allows a case-study analysis but also empowers a longitudinal analysis of the development of the relations between the Yugoslav authorities and the Italian minority in Yugoslavia as well as the determinants and factors that affected it.

Nevertheless, although criticism of Brubaker’s model exists (cf. Chandler 1999; Wolczuk 2000; Kulyk 2001; Kuzio 2001), none has been able to refute it. On the contrary, Smith (2002, 3–16) reinforced it by introducing its fourth component (that is, the international *milieu*),¹¹ turning it from the *triadic* into a *quadratic nexus*.¹² Smith’s intervention in Brubaker’s model set the course for research on minorities for the next 20 years (Tesser 2003; Pettai 2006; Smith 2020; Krasniqi 2013; Abram 2021a).¹³

The suitability of the *quadratic nexus model* for analyzing Italian–Yugoslav relations is illustrated by Abram (2021a, 18; Abram 2021b, 41–60), who uses “the system of international relations” as the fourth component. He points out that the minority issue in Yugoslavia cannot be considered outside “the idea of ‘active coexistence’ on a global level, [since the Yugoslav Communist Party’s 1958] programme underscored the recognition of national minority rights in the development of a

new system of international relations” (cf. Haug 2012; Udovič 2022). *Via facti* we agree with Abram (2021a, 2021b) that Italian–Yugoslav relations cannot be studied by not including the international *milieu* and its accompanying events; what is methodologically and epistemologically problematic for us is to equalize the fourth variable (the international environment) with Brubaker’s three, as the fourth variable represents “just” a framework in which Brubaker’s three components are interacting among themselves (cf. the diagram by Pettai 2006). Instead of using the term *quadratic nexus*, which is somewhat inaccurate when analyzing Italian–Yugoslav relations, we therefore opt for an *expanded triadic nexus* (Figure 2).

Based on our research thesis, illustrated in Figure 1, our discussion on the introduction of the BB will focus mainly on an analysis of the *expanded triadic nexus*, focusing on the vertex of the nationalizing state. We will look at both the domestic and foreign policy reasons for introducing the BB. We will limit ourselves to this based on an analysis of primary sources, which indicate that members of the Yugoslav political elite often emphasized the importance of including minorities in the sociopolitical make-up of the state to additionally legitimize this order while also reducing the significance of nationality and ethnicity, which would in the long run lead to reduced ethnic tension and conflict, the possibility of which could already be felt in the 1960s.¹⁴

Italian Minority Protection in Yugoslavia: The Application of the Expanded Triadic Nexus Introduction

Relations between Yugoslavia and Italy¹⁵ after the First and Second World War are considered among the most complex in Europe. This can be attributed to three factors: (1) after WWI, having switched sides to the *Entente*, Italy was given a third of the Slovenian ethnic territory and a large part of Istria, both of which should have been part of Yugoslavia according to their ethnic composition; (2) in 1941, Italy occupied part of Yugoslavia—half of Slovenia and other parts (part of Croatia, today’s Montenegro, Bosnia and Herzegovina, etc.)—effectively participating in the partition of Yugoslavia; and (3) after WWII, the Cold War started precisely on the border between Yugoslavia and Italy, starting with the arrival and later forced withdrawal of Yugoslav Partisan forces from Trieste and later with the protracted procedure of determining the border between the two countries, lasting from 1947 to 1975. Only with the Osimo Treaty of 1975¹⁶ was the Gordian knot finally cut on one of the hotspots with the highest potential for military conflict (Pirjevec, 1995; see also Komac, 2015a, 2015b).

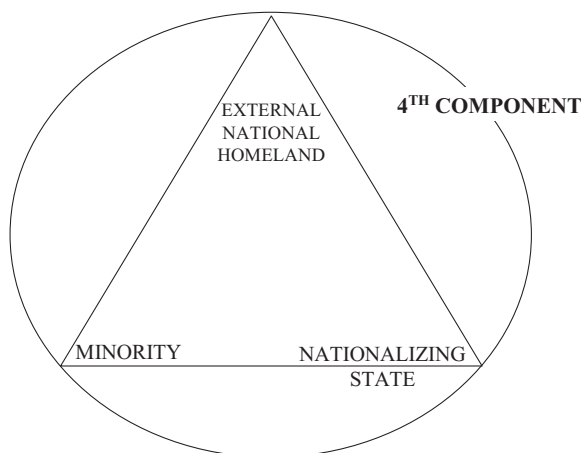


Figure 2. Methodologically and epistemologically upgrading the *triadic nexus* into an *expanded triadic nexus*. Source: Authors illustration.

Apart from the geopolitical shifts and changing borders between Yugoslavia and Italy, the relations between the two countries after WWII were further complicated by two other determinants: (a) the ideologically and politically different systems in the two countries and (b) the changed ethnic composition of the border territory, particularly on the Yugoslav side.

With respect to the former, we must note that, with the ascent of Tito and his comrades (Pirjevec, 2011a) to power, Yugoslavia became a communist or socialist state and as such was part of the community of states in the sphere of influence of the Soviet Union (until 1948).¹⁷ On the other side, Italy—partly “administered” by American allied forces—remained a country with a liberal economic and political order. Although historical analyses of Italian-Yugoslav relations often neglect this ideological divide between the two states, we believe that we cannot fully comprehend the state of affairs between Yugoslavia and Italy between 1947 and 1990 without also analyzing their sociopolitical, economic, and cultural relations (cf. Mišić 2013, 2018, 2021, 2022; Portmann and Ruzicic-Kessler 2014; Bucarelli et al. 2016; Ruzicic-Kessler 2018; Kapetanović 2022).

But from the perspective of our analysis, the critical factor of the two is the latter—the changed ethnic composition of the *newly acquired* Yugoslav territory. The composition started changing rapidly right after 1945¹⁸ and even more drastically after the Paris Peace Treaty was signed in 1947, allowing Italian citizens to “become citizens with full civil and political rights of the State to which the territory is transferred”¹⁹ or to opt for Italian citizenship within a year.²⁰ Of course, the decision was personal, but given the political and ideological constellation in Yugoslavia at the time, the fearmongering about what would happen to Italians if they stayed in Yugoslavia, as well as soft (and less-soft) measures of the Yugoslav authorities that “helped” Italians “choose,” it comes as no surprise that a large number of Italians from the *newly acquired* Yugoslav territories opted to move to Italy. And this drastically changed the composition of the population in these parts²¹ as well as the attitude of Yugoslav authorities to the Italians who stayed in Yugoslavia.²²

The fact that Yugoslavia encouraged Italians to move to the other side of the border was not against postwar central Party policies, as confirmed by Komac (2022). He notes that the idea of an ethnically homogenous state was appealing to the Communist Party, and they were using different forms of ethnic engineering to build such a state including relocations, deportations of ethnic minorities, and international treaties. He adds the importance of remembering that Yugoslavia settled agreements with Eastern bloc countries including Hungary, Poland, Ukraine, and Czechoslovakia regarding deporting minority members. This finding clearly shows that Yugoslavia initially sought to create a nationally homogenous state (nationalizing state), where it would be easier to introduce a socialist system. The authorities were aware of the pitfalls that befell the Kingdom of Yugoslavia before the war precisely because of national(ist) strife, which not only caused instability in governance but also culminated in a fratricidal war between 1941 and 1945. In such a frame of mind, there was hardly room for the Italian population in Yugoslavia.

Pirjevec (2011b) makes an important observation in terms of *the nationalizing state* and minority triadic components: for Slovenians (Yugoslavia), Koper (and the entire area of what later became the District of Koper, which is the focus our research) “fell from the sky” as a gift no one expected. Pirjevec says Trieste was the only symbolically important access point to the sea for Slovenians, and Koper was beyond the Slovenian frame of mind. When Tito saw that he could not get Trieste—according to Pirjevec, he already knew this from his talks with Churchill in Naples in 1944—he simply took Koper as better than nothing. Koper was therefore second best after Slovenians could not get their first choice.²³ This thesis by Pirjevec provides some sense to the different approaches in encouraging the Italian population to opt for Italy after 1947. In any case, the exodus stopped in 1951, but the world had already changed dramatically by then.

After splitting from the Cominform in 1948, Yugoslavia sought partnerships with Western Allies. The latter knew that Tito needed money for survival, so they tried to pressure Yugoslavia to reach a solution for the never realized Free Territory of Trieste (FTT). The apex of the first wave of the Cold War, the Korean War, and above all the inability of the United Nations to bring the FTT to life due to the Cold War blockade led to the Allied decision in 1952 to leave the administration of the

FTT's Zone A to Italy. Tito responded with vitriol, explaining at an event near Nova Gorica that he would consider the move as a declaration of war. The crisis escalated, but so did the economic situation in Yugoslavia, leading it to soften its stance somewhat and accept a compromise that made neither Italy nor Yugoslavia particularly happy. Zone A of the FTT was given to Italy and Zone B to Yugoslavia. A line was drawn between the two zones, which Italians regarded as provisional (*linea di demarcazione*), whereas Yugoslavs understood it as a regular border between the two states. This different interpretation persisted for another 20 years, until the signing of the *Osimo Treaty* in 1975.

In the initial post-WWII period (1945–1954), the Italian minority in Yugoslavia found itself in dire straits. Although the Constitution of the Federative People's Republic of Yugoslavia guaranteed minorities the right to “the free use of their own language,”²⁴ this specifically also being reaffirmed for Italians by Articles 4 and 7 of the Permanent Statute of the Free Territory of Trieste, Abram (2018) found that between 1947 and 1955 visible signs of the presence of the Italian population on the *newly acquired* Yugoslav territory were being erased from public spaces.²⁵ This was also the case for bilingualism and activities in other areas (Abram, 2021a).

After concluding the Memorandum of Understanding regarding the Free Territory of Trieste (MoU) in 1954 and a gradual rapprochement between Yugoslavia and Italy, the situation also changed for the Italian minority in Yugoslavia. Their right to use their own language in private and public spaces was defined in Point 5 of Annex II to the MoU. This point also intervened notably into public space, stipulating that public signs in bilingual areas must be in both languages. In this case—probably due to the temporary resolution of relations with Italy, the rise of new initiatives around the world (the Non-Aligned Movement), the thawing of relations with the Soviet Union (the Belgrade and Moscow Declarations, 1955/1956)—this written commitment encouraged Yugoslav authorities to grant the Italian minority more rights also in the public space (Abram 2018, 2021a; Orlić 2019). We believe the major contributor to the relaxation of attitudes toward the Italian population in the area was Yugoslavia's association with postcolonial states. If Yugoslavia wanted to assert itself as the leader of the newly emerging Non-Aligned Movement, it had to lead by example, showing it would defend their basic rights and that it differed from Western and Eastern regimes.

But of course, even the protection of minorities, to which Yugoslavia committed itself, did not go as smoothly as it should have. The first issue, relevant for the entire time from 1955 to 1990, is the different status and position of the Italian minority relative to other minorities in Yugoslavia. Yugoslavia was much more generous toward this minority than it was toward others (e.g., the Hungarian one), which was probably because Italy was a Western country and a member of the European Economic Community. The second—and previously mentioned—issue was the discrepancy between commitments and practice, also in the case of the Italian minority. As an illustration of this, the *Findings, Positions and Proposals of the Local Conference of the Koper branch of the Socialist Alliance of the Working People* from 1988 contains the following quote: “The self-governance acts of united labour organisations should be translated, but they are mostly not”, also wondering “whether the bilingual services were on an appropriate level.”²⁶ In other words, 30 years after introducing measures guaranteeing full bilingualism, the dilemmas faced by the Italian minority were more or less the same. The third observation within the Yugoslav–Italian *expanded triadic nexus* are the differences at the local level. Although Italy (the *external national homeland*) insisted that the Italian minority in Yugoslavia was indivisible,²⁷ Yugoslavia permitted its republics to deal with the concrete benefits of minorities. This led to the Italian minority in Slovenia and Croatia being protected differently, as confirmed by the Minutes (*Zapisnik*) from 1965 where the Slovenian political leaders conditioned the protection of the Italian minority on its existence, whereas the Croatian side conditioned it on a specific number of its members.²⁸

BB in the District of Koper as an Element of the Nationalizing State: The Fourth Component

The *new path* that Yugoslavia started pursuing in the second half of the 1950s brought two major shifts: internally, the political elites started a gradual liberalization of the economy (although still

within the framework of the socialist political and economic system); in the area of foreign policy, Yugoslavia, with its experience of being tied strongly to the East until 1948 and to the West between 1948 and 1955, sought a *third way*, which materialized in 1961 with the establishment of the Non-Aligned Movement. In this domestic and foreign policy context of thawing, Yugoslavia also adopted a friendlier policy toward the “foreign” minorities present on its territory. In the case of the Italian minority, this was reflected in its renewed physical visibility (e.g., reinstatement of bilingual street signs, bilingualism in official proceedings; Abram, 2021a) as well as in activities of the political elites to encourage its “political visibility.”²⁹ Justifications for why Yugoslavia should do this were diverse, ranging from no official justification and the relevant officials simply assuming these rights of the Italian minority as a fact³⁰ to the reasoning that respecting the rights of minorities in Yugoslavia by allowing them to use their own language and reinstating visible bilingualism would set an example for other countries where Yugoslavia had its own minorities.³¹

Foreign Policy Justifications for Introducing the BB in the District of Koper

When analyzing the foreign policy factors behind the introduction of the BB, we cannot overlook the already mentioned Paris Peace Treaty between Yugoslavia and Italy (1947) and the MoU (1954), both of which defined the language rights of Italians who decided to stay in Yugoslavia. The fact that Yugoslavia did not wish to open new fronts after having invested a lot of effort into establishing the MoU with Italy is evident from a memo of the Ethnic Affairs Commission sent to the Yugoslav Communist Party’s Central Committee (Ethnic Minorities Commission) of July 3, 1959, where the state authorities provide the federal level with a detailed list of measures Slovenia took to insure the implementation of the MoU.³² A mixed Yugoslav–Italian commission for coordinating the implementation of the MoU met the same year. In the preparations for this meeting, the federal authorities inquired about the changing of the names of minority members in the District of Koper, a question that the Italian side was certain to pose. The answer from the District of Koper authorities was “[T]o our knowledge, there were numerous cases [of making the surnames and first names Yugoslav—comment added] on the Croatian side, but not many in our district.”³³

Yugoslavia’s intention to send a foreign policy message to its neighbors by granting a certain level of protection to minorities on its territory is also confirmed by the intervention made by Mitja Ribičič, a member of the Executive Council (government) of the Socialist Republic of Slovenia, when passing the Act on Bilingual Schools and Schools with the Language of National Minorities as the Language of Instruction in the People’s Republic of Slovenia. Ribičič highlighted the political significance of the document, which he said was important “both at the level of Yugoslavia and in the framework of relations with neighbouring countries, specifically Hungary, Austria and Italy.” He went on to explain that education in the District of Koper remained monolingual (with separate Slovenian and Italian schools) “due to certain international commitments” (i.e., the MoU).³⁴ The same spirit is reflected in subsequent minutes recorded by district, state, and federal bodies; however, international commitments as set down in the MoU are brought up less and less frequently and the importance of the minority as an element of building the sociopolitical system of Yugoslavia is mentioned more and more. In general, we can say that the foreign policy component was much more important in the first decade after signing the MoU but later sunk into the background, failing to reemerge even during the “second Trieste crisis” in the mid-1970s.

To summarize, by looking at the link between minority protection in Yugoslavia and international commitments and relations with neighboring states, we can see that the idea of minority protection as an instrument of Yugoslav diplomacy mainly came in two forms: (1) *pacta sunt servanda*, marked by temporarily closing open issues with Italy and a boost in economic cooperation between the countries, and (2) Yugoslav minority policy as an example for neighboring states (Italy, Austria, and Hungary). The latter was emphasized several times in meetings of the Commission on Minorities of the SZDL (Socialist Alliance of the Working People) and other SZDL fora. Yugoslav policy toward minorities was therefore not supposed to be based on “counting minority members” or on the attitude of “neighbouring countries towards Yugoslav minorities.”³⁵

Domestic Policy Justifications for Introducing the BB in the District of Koper

The question that the Communist Party elites kept encountering was how to encourage individuals to implement this new, friendlier policy toward minorities in their everyday contact. Discussions went in different directions—from taking the protection of the Italian minority as a given fact that simply must be observed to explanations that people need to be encouraged to accept this new minority protection policy as something positive. The state invented an instrument, known as the BB, precisely for this purpose. The first mention of this planned instrument, directed at ensuring greater minority protection with respect to the use of their language, was in 1959. The minutes from the 25th session of Slovenian Communist Party's District Committee of Koper state that a "regulation is expected to be passed in the autumn granting a stimulation/special bonus to officials who prove they can work in both languages."³⁶ The state decided to adopt a policy of encouraging the protection of the Italian minority also by rewarding individuals who can work with people in the Italian language. It only took a few months for the bonus to be de facto introduced.

March 1960 brought a new Decree on the Job Classification in the Administrative Bodies of the District People's Committee of Koper,³⁷ which already required applicants for specific positions to speak Italian, but this decree did not yet mention any financial reward for this skill. This was introduced a year later in the Decree on a Special Bonus for Employees who also use Italian in Official Business,³⁸ granting officials also using Italian a "special bonus of up to 5,000 dinars a month."³⁹ Records show that the same policy was also introduced for members of the Hungarian minority, the only difference being that the local communities with the Hungarian minority kept warning the state authorities that they were short on funds for the BB,⁴⁰ whereas there were no such financial constraints in the District of Koper.

Symbolically, the position of the Italian minority improved with the adoption of the Constitution of the Socialist Republic of Slovenia (Ustava Socialistične republike Slovenije, 1963), which stated in Article 77 that, on territories with the two minorities, "the Italian and Hungarian languages shall be equal to the Slovenian language in public and social life. The manner of exercising the rights of members of the Italian or Hungarian nationality shall be determined by law and municipal statutes." The adoption of state constitutions thus transferred the full burden of implementing minority rights from the federal to the state/local level. The dilemma of the relation between the *nationalizing state* and the *minority* was therefore no longer officially in the domain of the federation but rather in the hands of its constituent republics and local entities. This led to problems both in Italy (the *external national homeland*), which insisted on equal protection of both parts of its minority as well as between the Italian communities in Slovenia and Croatia, where the latter constantly complained that protection in Slovenia was better.⁴¹

An analysis of many other minutes taken by decision-making bodies at the state and District of Koper levels shows that the BB established itself as an essential instrument for ensuring active bilingualism and protecting the Italian minority in the District of Koper. After 1964, discussions only revolved around how this bonus should be granted:⁴² (a) whether it should be tied to the individual or the individual's post,⁴³ (b) whether it should be fixed or variable (as a combination of a fixed bonus and an additional super-bonus),⁴⁴ (c) how to devise uniform criteria for granting the BB,⁴⁵ etc. The need for the bonus and its justification were no longer up for discussion. But there were debates on the broader understanding of bilingualism and the position of the Italian minority in the Yugoslav sociopolitical system.

Archival sources record one of the first such discussions in a meeting of the ZKS Central Committee's Commission for Minority Issues in 1959, where Vlado Majhen explained in his expose that the Communist Party should set an example of inclusion of minorities in the sociopolitical life of Yugoslavia. He went on to state that the Communist Party should "involve [young] members of national minorities in [local] political leaderships."⁴⁶ A conclusion that the socialist system is more successful in resolving minority issues than capitalist states was made at the session of the Main Board of the SZDL of Slovenia on February 3, 1967.⁴⁷ This position is reiterated a decade later in a

document of the Slovenian Assembly on the realization of special rights of the Italian and Hungarian minorities,⁴⁸ whose introduction includes the following highlights:⁴⁹

- (1) our consideration of the position and development of nationalities [in Yugoslavia, and Slovenia] is original; it derives from the special, original social foundations of our socialist self-governing society;
- (2) we have always understood the national question also as a class question;
- (3) members of the nationalities living in [Yugoslavia] are our political wealth, our advantage; and
- (4) replacing the term minority with nationality is the political expression of qualitative change; etc.

This logic continues throughout the document, which is a thorough analysis of the situation regarding the Italian and Hungarian minorities in Slovenia.

All three cases—Majhen's intervention, conclusions of the SZDL Main Board, and the Assembly's analysis—show that Yugoslav political leaders viewed minorities as a sociopolitical issue, not a national one, meaning that minorities in Yugoslavia could be a building block of the new, socialist sociopolitical order, but they needed proper encouragement for that. Therefore, neither the federal nor the state political leaders were against greater protection of minorities on the state and local levels. On the contrary, declaratively they even supported a higher level of protection, which—according to Majhen (1959)—should not be based on reciprocity (i.e., how neighboring countries protect the Slovenian or Croatian minority) but rather on “reverse reciprocity,” meaning that Yugoslavia should give the minorities on its territory more to set an example.

Discussion and Conclusion

Our paper sought to establish why Yugoslav (and by extension the Slovenian) authorities introduced the BB as an instrument for protecting the Italian minority in the District of Koper. We built the analysis on our own model of an *expanded triadic nexus*, which combines the influences of the needs of the Italian *minority* in Yugoslavia, the characteristics of the *nationalizing state* (Yugoslavia), and the *external national homeland* (Italy), all of which is set in the frame of the fourth component, the influence of norms and the actors' activities in the international community. The analysis brought the following conclusions:

- (1) For the Yugoslav leadership (as *the nationalizing state*), the only relevant minority whose policies should be set out at the federal level were the Albanians; other minorities were protected usually at the level of the republics, districts, or local communities, (only) if the international agreements and treaties required so. Even in such cases, the protection of minorities was mainly left to the state (republic) level and to local communities.
- (2) Applying the first conclusion to the case of the Italian minority in Yugoslavia it is possible to say that the Italian minority was not a relevant actor in the Yugoslav system of minority protection, first, because its members who remained in Yugoslavia were looked upon with suspicion by Italy (sometimes they were called communists or untrue Italians and sell-outs⁵⁰ and, second, because it was not regarded as a relevant actor by either the federal or the state and local authorities. Consequently, it was pushed to the sidelines, assuming a sort of *voluntary submission* and *pragmatism*, which Lusa (2021) illustrates with the words “Dovemo parlar con tutti, dovemo domandarghe soldi a tutti e dovemo cior soldi de tutti.”⁵¹
- (3) Italy (as an *external national homeland*) played a marginal role in the process of protecting the Italian minority in Yugoslavia. Although the consulate in Koper sometimes tried to influence the local authorities to get certain things moving, the available archival sources allow us to conclude that Italy was not too interested in the conditions of the Italian minority in Yugoslavia. The reason for this may lie in the MoU being a two-way treaty. If Italy showed

the willingness to demand that Yugoslavia accomplish duties stemming from international treaties, this would surely spur Yugoslavia to also demand more rights for the Slovenian minority in Italy.

- (4) What kind of influence did the fourth element, the international framework, have on the situation faced by the Italian minority in Yugoslavia? Apart from the declarative level, there was none. The Italian minority in Yugoslavia “was forgotten” as soon as the MoU was signed, as the international community did not really address its rights more than strictly necessary. Because Yugoslavia declaratively (in some cases also in practice) and formally took care of the Italian minority on its territory, it did not represent an issue the great powers felt inclined to deal with at the height of the Cold War.

We can consequently justly question Yugoslavia’s motives for introducing the BB. The answer is clear: mainly out of domestic political need or necessity. The BB was an instrument the Yugoslav authorities (i.e., the Communist Party) invented to include the Italian minority more into the building of the new sociopolitical order. In this, the BB had a dual role. For the majority population, it was a reward for using the Italian language. And for the minority, the influence of the BB—the visible bilingualism and possibility of using their own language in official dealings with state institutions—created the impression that the regime looked favorably on them, as they could live out their national identity within the socialist system. In this sense, the BB was a mirage of sorts that kept both sides happy—the “service provider” (majority population) and the “service seeker” (minority members). However, neither side was aware that the BB primarily helped the political elite in building the new sociopolitical order, where the national question was only one of the basic components of the class struggle (Bačič 1977, 458–469) and therefore less and less important until it would become completely obsolete once the society was fully reformed. Additional proof of this can be found in the introduction of the concept of *nations* and *nationalities* (ethnic minorities), which Yugoslavia started using in the late 1960s and which took hold after a new Constitution was adopted in 1974.⁵² With the expansion from *constitutive nations of Yugoslavia* to *nations and nationalities of Yugoslavia*, the authorities diluted the significance of classical *nationhood* and started replacing it with workers’ self-governance. In this system, your national or ethnic identity was increasingly irrelevant, and it was much more important who or what you were in terms of ideological affiliation.

To conclude, the introduction of the BB has little to do with the *expanded triadic nexus*. In fact, it even has almost nothing to do with the protection of the Italian and Hungarian minorities in Slovenia (apart from its indirect effects). But it has a lot to do with the ideological social constellation and the argumentation of Yugoslav political elites that nations are an outdated 19th century concept, outgrown by both mankind and the socialist system. The BB was therefore not born out of altruism, but rather based on selfish interests of the political elites, which—under the guise of minority protection—mainly wanted to reinforce and protect their own position.

Acknowledgments. We would like to thank professor Miran Komac, the editors, and the two anonymous reviewers for their substantive contribution to the quality of the article.

Financial support. This work was supported by two research programmes (Slovenia and Its Actors in International Relations and European Integrations, P5-0177, and Ethnic and Minority Studies and the Slovene Studies, P5-0081) and by the research projects (Institutional Bilingualism in the Ethnically Mixed Areas in Slovenia: Evaluation of Bilingualism Bonus Programme, J6-9373, and Political Participation of National Minorities and Persons Belonging to Them: Comparative Study of Political Participation of Slovene Communities in the Neighboring Countries of the Republic of Slovenia, J5-3117), all financed by the Slovenian Research and Innovation Agency (ARIS).

Disclosure. None.

Notes

- 1 Following the signing of the Memorandum of Understanding [MoU] regarding the Free Territory of Trieste between Italy and Yugoslavia in London in 1954, which effectively abolished

- the Free Territory of Trieste and drew the border between Yugoslavia and Italy, the Koper, Izola, and Piran municipalities came under the administration of the Socialist Republic of Slovenia (then part of Yugoslavia) (Memorandum of Understanding regarding the Free Territory of Trieste, October 5, 1954, U.N.T.S. 235). From 1991, the three municipalities (Ankaran becoming an independent municipality later) encompass the part of Slovenia where segments of an Italian minority continue to live and work.
- 2 Komisija za manjšinska vprašanja pri CK ZKS, 1959, Zapisnik Komisije za manjšinska vprašanja pri CK ZKS z dne 5. junij 1959, Arhiv Slovenije 1589-III (825), 2–5.
 - 3 Contrary to “national.”
 - 4 Aleš Bebler—Primož was a partisan, diplomat, and a high-ranking politician in post-WWII Yugoslavia. He was advisor to Edvard Kardelj (the chief ideologist and No. 2 in Yugoslavia), the permanent representative of Yugoslavia in the United Nations (1950–1952), and the ambassador to France and Indonesia, to name a few of his functions.
 - 5 A negative attitude toward Albanians in Kosovo and Metohija can also be found in Bebler’s expose on p. 4 where he writes (with a sublimely negative tone): “Today, there are 750 thousand Shiptars, 250 thousand more than 20 years ago, what can be attributed to the sharp growth of this population.”
 - 6 Komac, Miran. 2023. Interview by author regarding the minority protection in Yugoslavia. Ljubljana and via email, February 7, and March 17, 2023.
 - 7 Yugoslavia actively participated in the debate surrounding the formulation of the *Helsinki Final Act*; however, due to the Brezhnev doctrine, it was most concerned with Principles I to VI (Principle I: *Sovereign equality, respect for the rights inherent in sovereignty*; Principle II: *Refraining from the threat or use of force*; Principle III: *Inviolability of frontiers*; Principle IV: *Territorial integrity of States*; Principle V: *Peaceful settlement of disputes*; Principle VI: *Non-intervention in internal affairs*), and not VII (*Respect for human rights and fundamental freedoms, including the freedom of thought, conscience, religion or belief*), which were already accomplished for Yugoslavia (Helsinki Final Act, 1975, <https://www.osce.org/files/f/documents/5/c/39501.pdf>. [Accessed May 30, 2021]; see also Rizman, 1979). The irrelevance of *Principle VII* for/in Yugoslavia was also commented on by the U.S. Helsinki Watch Committee in 1986. On p. 1, it states that “[m]ost troubling for Yugoslavia’s multinational society is severe ethnic and religious discrimination.” U.S. Helsinki Watch Committee. 1986. *Violations of the Helsinki Accords: Yugoslavia*. A Report Prepared for the Helsinki Review Conference. Vienna: Helsinki Watch. Universal Declaration of Human Rights. 1948. A/RES/217 (III).
 - 8 For more on the complex relations between the two states in the past and today and/or the Italian minority in (former) Yugoslavia compare a few recent studies such as Abram (2018, 2021a, 2021b), Bajc (2014, 2017), Bajc and Matjašič Friš (2019), Bucarelli et al. (2016), Dato (2010), Furioso Cenci (2023), Godeša (2014), Grgič and Popič (2023), Hrobat Virloget (2019, 2021, 2023), Jurić Pahor (2012, 2018), Klabjan (2011), Lampe (2018, 2019, 2023), Lenassi and Paolucci (2020), Mišić (2013, 2018, 2021, 2022), Mezgec (2023), Montini and Mišić (2017), Orlić (2015, 2019), Pelikan (2022), Pirjevec (2015, 2016), Poropat Jeletić (2017), Pupo (2005, 2012), Purini (2012), Ramšak (2016), Reglia (2012, 2016), Režek (2016), Tomaselli, Engl, and Lupinc (2021), Umer Kljun (2015), Zaccaria (2019), and Žitko (2015, 2023).
 - 9 Kymlicka (2000, 187–188) understands minorities much more statically as ethnic “groups that formed complete and functioning societies in their historic homeland prior to being incorporated into a larger state.”
 - 10 Kemp (2006, 112) explains the difference between the kin-state and the nationalizing state as follows: “The idea of the kin-state is based on the rather nineteenth century premise that nations are bonded by ties of ethnic kinship. This notion of blood and belonging presupposes a primordial, almost tribal, linkage that, when given a political expression, provides argumentation—if not legal justification—for leaders and defenders of the nation to take action on behalf of all those linked by kinship. [...] In promoting a nation-based agenda, a kin-state may behave

like a nationalising state, but on a grander scale. Whereas the nationalising state's ambitions are confined to its own borders, a kin-state may seek to protect 'co-nationals' (on the basis of kinship rather than citizenship) wherever they live (usually in a neighbouring state).” For more on the issue of kin-state in Southeast Europe, see Stjepanovic (2015).

- 11 In his case, the fourth component was Euro-Atlantic integration.
- 12 Germane (2013, 29), for example, adds a fifth element to the *quadratic nexus*—the relational interplay among different national minorities in the same state.
- 13 Interestingly, the analysis of German–Romanian relations by Cercel (2017) uses the *triadic nexus* in the first part of the analysis but later expands it into the *quadratic nexus*.
- 14 Abram (2021a, 19) argues that tendencies toward Yugoslavism, or building a uniform Yugoslav nation, could be seen as early as the late 1950s. We are skeptical about this and believe the Communist Party leaders abandoned the idea once it became clear that the constitutive nations of Yugoslavia could not be merged, replacing the idea with a relativization of the importance of nations and ethnic identity in the new, socialist sociopolitical order. Therefore, this is not a case of abandoning but downplaying the role of national and ethnic identity in relation to the sociopolitical order (which, of course, was international).
- 15 The terms Yugoslavia, Italy, and Slovenia are used generically regardless of the changes in their political systems.
- 16 Osimo Treaty, 1975, U.N.T.S. 1466.
- 17 Some fragments of Soviet influence also remained relevant until the end of Yugoslavia in 1991. The Yugoslav Army in 1990/1991 waited for a signal from Moscow to act against the activities of the Slovenian and Croatian leadership. However, despite several calls from Belgrade, Moscow did not react. The Yugoslav Army then chose to act on its own accord, starting the war in Slovenia, Croatia, and Bosnia and Herzegovina.
- 18 For historical clarity, we must briefly contextualize the events in the territories of Yugoslavia and Italy in the 20th century. After WWI, Italy received parts of what were then Austrian territories, inhabited by mostly Slovenians. According to some estimates, around one-third of Slovenians remained outside their “national country.” In the ensuing years, fascism in Italy rose to power, introducing harsh measures against people speaking Slovenian (changing names on graves, changing names at birth, persecuting people speaking Slovenian in churches, teaching in Slovenian, and killing some of them because they spoke Slovenian). This period is first and foremost marked by TIGR (Trst–Istra–Gorica–Reka), an organization that fought for the freedom of Slovenians oppressed by fascism, and the two Trieste processes (I and the II) against Slovenian compatriots. This was followed by WWII. In the last days of the war, Tito and his comrades passing through Istria went to Trieste and entered the city on May 1, 1945. Nevertheless, the Yugoslav army members committed atrocities, killing civilians, and throwing them in sinkholes known as *foibe*. In 2020, the presidents of Slovenia and Italy made a symbolic gesture of peace by visiting the *Bazoviška fojba*. For more on *foibe*, see Pirjevec et al. (2012).
- 19 Treaty of Peace with Italy [Paris Peace Treaty], 1947, U.N.T.S. 49 and 50, article 19, ¶ 1.
- 20 Paris Peace Treaty, Article 19, ¶ 2.
- 21 According to a 1910 census, the greater area of present-day Slovenian coastal municipalities (Koper, Izola, and Piran) had a population of 24,669 Slovenians and 31,706 Italians (Troha, 2000, 205). Official post-1945 data show the following picture: whereas 18,324 Italians (52.7% of the population) and 16,347 Slovenians lived in the area in 1945, the ethnic composition had changed completely by 1956, with 34,306 Slovenians and 3,073 Italians (7.6%) living in this area. In 1959, the number of Italians living there is reported to have decreased further to just ^{2,475} (Komac, 2022).
- 22 Komac (2022) points out that the approaches in the Slovenian and Croatian parts of Zone B of the Free Territory of Trieste were completely different. While authorities in the Slovenian part allegedly made efforts for as many Italians as possible to move to Italy, the Croatian part of Zone B was supposedly more reserved to “encouraging” the Italian population to leave, stating

- economic reasons. A document of the Federal Secretariate for Foreign Affairs supports this line of thought, given by the Croatian administrators of Zone B, arguing that “those who had compromised themselves at the time of Fascism and during the war have already left.” Arhiv ZSZZ, 1955, Dokument št. 18075, Belgrade, p. 14.
- 23 Pirjevec (2011b) also points out that Tito insisted on the 9th Corps marching into Trieste to avoid resentment from Slovenians, who expected Trieste to be their window into the world.
 - 24 Constitution of the Federative People’s Republic of Yugoslavia, 1946, Chapter 3, Article 13, https://www.worldstatesmen.org/Yugoslavia_1946.txt. (Accessed May 30, 2021).
 - 25 Abram (2018) analyzes this on the case of Rijeka.
 - 26 Občinska konferenca SZDL Koper, 1988, Ugotovitve, stališča in predlogi Občinske konference SZDL Koper o uresničevanju pravic pripadnikov italijanske narodnosti v Občini Koper, št. 025/33-7, z dne 27. oktober 1988, at 2, Arhiv Slovenije 537-244 (2599).
 - 27 This caused some trouble for Slovenia and Croatia in relations with Italy after the break-up of Yugoslavia.
 - 28 Zapisnik o razgovorih s predstavniki medobčinskih komisij za manjšinska vprašanja v Kopru in predstavniki Unije Italijanov za Istro in Reko z dne 29. 3. 1965.
 - 29 Okrajni komite ZKS Koper, Zapisnik 25, seje sekretariata Okrajnega komiteja ZKS Koper, ki je bila 24. aprila 1959, Arhiv Slovenije 1589-III (872).
 - 30 Okrajni komite ZKS Koper, Zapisnik 25, 1959.
 - 31 Okrajni komite ZKS Koper, Zapisnik 25, 1959, 3.
 - 32 Zapisnik Komisije za manjšinska vprašanja pri CK ZKS, 2.
 - 33 Sekretariat Okrajnega komiteja ZKS Koper, Poročilo 34, seje Sekretariata Okrajnega komiteja ZKS Koper z dne 18. septembra 1959, at 3, Arhiv Slovenije 1589-III (881).
 - 34 Izvršni odbor Glavnega odbora SZDL, Zapisnik 6, seje Izvršnega odbora Glavnega odbora SZDL z dne 1. marca 1962, Arhiv Slovenije 537 (29).
 - 35 Komisija za manjšinska in izseljenska vprašanja ter mednarodne zveze, 1964, O manjšinah in narodnostno mešanih območjih v SR Sloveniji, at 15, Arhiv Slovenije 537-244 (270).
 - 36 Okrajni komite ZKS Koper, Zapisnik 25, 5.
 - 37 Odlok o sistematizaciji delovnih mest v upravnih organih Okrajnega ljudskega odbora Koper—Odlok št. 10, Uradni vestnik okraja Koper 6/1960.
 - 38 Odlok o posebnem dodatku za uslužbenca, ki v uradnem poslovanju uporabljajo tudi italijanski jezik, Uradni vestnik okraja Koper 11/1961.
 - 39 To give a better idea of this value, the same document states on p. 147 that the price of 1 kg of bread is 80 dinars. For 5,000 dinars, one could therefore get 62.5 kg of bread. In today’s terms, if 1 kg of bread costs about EUR 2, this would equate to EUR 125.
 - 40 Skupščina občine Lendava, 1977, Zahteva za takojšno dodelitev sredstev za dvojezično poslovanje, Dokument št. 402-27/76-01, Arhiv Slovenije 537-331 (2630).
 - 41 Zapisnik o razgovorih s predstavniki medobčinskih komisij za manjšinska vprašanja v Kopru in predstavniki Unije Italijanov za Istro in Reko, 1965.
 - 42 Izvršni odbor Glavnega odbora SZDL, Zapisnik 6, 1962, point 5 of the justification.
 - 43 Zakon o sistemu državne uprave in o izvršnem svetu Skupščine SR Slovenije ter o Republiških upravnih organih, 1979, Uradni list SRS 24/1979.
 - 44 Urad za narodnosti, 1985, *Osebni dohodek in dodatek na osebni dohodek za znanje in uporabo jezika italijanske oz. madžarske narodnosti* [...], Arhiv Slovenije 2046-47.
 - 45 *Enotni kriteriji za zagotavljanje sredstev za dvojezične dodatke delavcev v pravosodnih organih na narodnostno mešanem območju*, 1989, Arhiv Slovenije 2046–48; Urad za narodnosti. 1985.
 - 46 Komisija za narodnostna vprašanja, 1959, Dopis (Komisija za narodne manjine CK ZKJ) z dne 3. julij 1959, 2–5, Arhiv Slovenije 1589-III (815).
 - 47 Izvršni odbor Glavnega odbora SZDL Slovenije, 1967, Zapisnik 13, seje Izvršnega odbora Glavnega odbora SZDL Slovenije z dne 3. februarja 1967, Arhiv Slovenije 537 (35).

- 48 Skupščina Socialistične republike Slovenije, Informacija o uresničevanju posebnih pravic pripadnikov italijanske in madžarske narodnosti v SRS z dne 20. 12. 1976, 2–3, Arhiv Slovenije 537 (104).
- 49 Selected points from the document that are relevant to our topic.
- 50 Udovič, Boštjan. 1996. “Discussion with Alda, Dančka and Mother about Slovenians Fleeing across the Border.” Notes according to memory. Sečovlje.
- 51 “We must speak with everyone [politicians in Yugoslavia/Slovenia], we must demand money from everyone [in Yugoslavia/Slovenia], and we must take money from anyone.” The original statement is written in the *Istroveneto* (dialect of Istria and Veneto).
- 52 Ustava Socialistične republike Slovenije, 1974, Ljubljana.

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