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On the cover:
Ostrov Island, Danube River,
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Marginal Areas, between Potential and Future Projects

LAURA BONATO

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These people give a new meaning to the place where they reside and make positive contributions to the community, often seeking new forms of rurality and cultural and socio-economic models related to environmental sustainability.

Marginal Area

THE MOUNTAINS, and particularly the Alps, are probably the marginal territory par excellence. Subject to depopulation as early as the 19th century, Alpine areas experienced a major crisis after the Second World War, following the processes of industrialization and urbanization, as they were considered unsuitable, compared to the flat areas, for the use of new mechanized techniques (Bonato 2017).

The history of life in the Alps began between the 12th and 15th centuries, when the first hamlets started to appear and farming developed. The Alps gradually became a place of passage and pilgrimage, with the construction of communication routes, paths and monasteries, turning into meeting places and crossroads of commercial and cultural exchange. From the second half of the 16th century until the 17th century, however, there was a

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gradual loss of autonomy. In fact, due to the advancing glaciers and falling temperatures, the Alps begin to be seen as hostile and useless places and perceptions begin to spread that contrast the primitive and inadequate life of the mountains with the civilized and advanced life of the cities. At the same time, this antithesis sees the rural Alpine populations as the expression of tradition and integrity, as opposed to the urban populations that represent corruption and the degradation of customs. In this context, there was a revival of interest in the mountains on the part of writers and travelers, a tendency that came to a halt during the 19th century due to the birth and rapid consolidation of the industrial system that pushed the mountain dwellers to move and emigrate to territories further down the valley, until the aforementioned crisis after World War II.

In the Italian Alps, depopulation and the exodus towards the valley began in the period of industrialization, in the mid-19th century, and continued until at least the 1970s: entire territories were abandoned and totally deprived of the possibility of an economic and social recovery in favor of adjacent areas with new services and infrastructures (Bätzing 2002). In particular, the period most affected by depopulation is the one between 1961 and 1971, due to the massive industrial development and urbanization process that generated significant migration to productive and urban areas. The city is par excellence the place of work, comfort and a variety of services; on the other hand, the territories that are abandoned and left uncultivated favor deforestation, and thus the reduction of wooded areas, soil impoverishment and hydrogeological instability: obviously all this causes not only environmental and economic impoverishment, but also cultural and social depletion, with the “disintegration of communities and the dissipation of local memories and cultures” (Teti 2017, 9); there are fewer professionals specialized in agroforestry practices, as both their knowledge and peasant knowledge are disappearing; there is also an ageing population and a decline in services and income.

However, since the 1980s and 1990s there has been a change, a sort of “Alpine renaissance” (Morandini and Reolon 2010) that sees the disappearance of certain stereotypes and an unexpected revival of interest in living in these areas, together with an important demographic and social variation, with the arrival of new inhabitants who bring about change and become promoters of resilience among local communities.¹

New life projects can be realized in marginal areas and these areas are thus charged with new meanings that go beyond actions aimed at mere economic gain, such as those aimed at seasonal mass tourism and the commodification of territories. This renewed relationship between the inhabitants and the Alpine region emerges as a practice that deserves to be investigated as an example of territorial political strategies effectively oriented towards the needs of the inhab-

itants, in which the most interesting challenge is represented by the possibility of intervention and the dialogue between different disciplines (Bonato 2017).

But who are the new inhabitants of Alpine areas? Those who—coming from the cities or, in any case, from non-mountainous areas—often settle in abandoned locations, creating a new territory where the previous one was previously lost? Those who come from different socio-cultural backgrounds and whose knowledge interacts and intertwines with the traditional skills they partly acquire?

We can schematically reduce migrants to three types (Membretti, Barbera, Dagnes, and Musacchio 2019):

a) by choice: they decide to move away from the city in search of a lifestyle in harmony with nature. They are mainly young Italians, but also pensioners, who possess significant economic and cultural resources, as well as a few foreigners who come from wealthy European regions. They engage in self-entrepreneurial projects in the agri-sylvo-pastoral, tourism and socio-cultural services sectors. This form of immigration, which began in the late 1990s, is numerically insignificant but has brought about a change in the composition of the population (Bergamasco, Membretti, and Molinari 2021);

b) out of necessity: they are foreigners from poor countries seeking better living conditions; often, from the cities they moved to in the 1990s in search of a job, they move to marginal areas in search of cheaper housing and work in the tourism, personal services and agri-sylvo-pastoral sectors. A survey conducted by Membretti and Lucchini (2018) showed that mountain dwellers by necessity also value a better quality of life and environment, greater security than in the metropolis, and a social sphere characterized by a sense of community and direct relations;

c) by force: these are asylum seekers and refugees who are placed in mountainous locations based on relocation and reception projects. Their impact on the territory is numerically significant and they are now the main factor in combating depopulation, falling birth rates and a rising median age. They also contribute to the preservation and development of entire production systems, recover abandoned homes and are the necessary users for services such as schools and transport (Bergamasco, Membretti, and Molinari 2021).

The contribution of these different categories of new residents to the labor market is relevant because it can both foster a possible revival of settlements and “counteract that social desertification, typical of the *dead season*” (Dematteis and Membretti 2017, 70).

Various studies have shown that those who become mountain dwellers by choice, who invest in a decisive change of life, although not very numerous, demonstrate a willingness to establish a “true” bond with the mountains, al-

most becoming defenders and guarantors of the local bio-socio diversity. A new inhabitant, coming from the city, or in any case from a non-mountainous area, socialized to a large extent elsewhere, brings with him a set of values, customs, and skills mostly different from those of the locals, and often a new activity, bringing about the renewal of territorial resources by introducing organic farming, technology, bio-architecture, etc. New projects and ideas, new forms of sociability, knowledge and skills mingle, renew Alpine culture and reinvent tradition. Not least, their environmental impact is usually low because they tend to inhabit existing buildings.

The considerable contribution in terms of innovation and the strong impetus given to economic recovery by the new residents of mountain areas have resulted in a “composition of many local populations” (Viazzo and Zanini 2014, 1), characterized by very different social and cultural aspects. I feel it is imperative to assess the contribution of those who decide or are forced to remain in their place of origin and who have only recently started to be investigated. “Restance” is the phenomenon that often develops in the search for new forms of rurality and cultural and socio-economic models linked to environmental sustainability (Teti 2014). Those who stay by choice remain or return with the firm intention of contributing in a concrete manner to the development of the territory and the community, to their liveability (Pollice, Rinella, and Epifani 2021), by actively participating in management and planning policies, formulating practical and substantial proposals, capable of directing every decision-making process, and taking care of the territory. In this case, restancy is a conscious life choice that reshapes the relationship with the territory and its potentialities. Those who stay out of necessity have no alternative; they would like to leave their place of origin but do not have the possibility: nevertheless, they often make positive contributions to the community (Membretti, Salvo, and Tomnyuk 2023).

We have taken up a concept dear to anthropology, that of “homecoming”: a “homecoming” of the production, enhancement and narration of places. We are witnessing the reappearance of the centrality of the local, which—not without complications, not without the possibility of conflict arising from ethnic, identity, linguistic, economic and environmental issues—makes it opportune to rethink the role of the territory, its care and valorization.

Recovery

WHILE THE 1990s saw a reversal of this trend, with a gradual repopulation and the emergence of virtuous local development processes characterized by new ways of inhabiting the mountains and using environmental resources, in the same period anthropological research also shifted its attention from the study of Alpine communities as closed social structures and their systems of thought and ecological adaptation to the analysis of material and immaterial cultural assets: the discipline became interested in the establishment of festivals, in the traditions, knowledge and know-how of local populations for the purposes of preservation and valorization. From a “savage ethnography” perspective on communities that have escaped modernization, we move on to a multidisciplinary and integrated study of communities and territories that are instead in touch with the flows and changes brought into the contemporary world by globalization (Viazzo 2017). It is in this context that the interest of cultural anthropology turned towards the new spatial policies for the mountains, focused on the real needs of the population, and the bottom-up activities resulting from them.

In recent years, anthropology has been investigating the increasing assignment of value to inland, marginal and abandoned areas, because they show themselves to be contexts for the development of new resilience strategies. It is to these areas that it is now possible to look in order to devise re-territorialization strategies and interventions that intersect with culture, the driving force of change, towards the creation of new, intrinsically sustainable forms of living.

In marginal areas, which are by definition deprived or poor in services, or even abandoned, it is possible to renew the processes of responsibility and care for the environment. These places offer themselves as a crucible of ideas and actions that include the regeneration of territories, repopulation, the experimentation with new forms of settlement, despite the fact that in the common imagination, especially concerning the mountain areas, the idea of an autochthonous and almost immobile local culture is still rooted (Dematteis 2017). In reality, there is uninterrupted interaction, collaboration and exchange between local communities with the wider context and with the city.

New unforeseen scenarios are serious urgencies today compared to those of twenty years ago: pastures, soils and forests that are no longer cared for are not just a jarring note in the propaganda of the “picture postcard” mountain, but constitute an environmental and cultural emergency for the territories downstream and the plains; landscapes must become “*landscapes of care*”, an attitude that invokes a state of concern, in addition to protective action, for which man is invested with new responsibilities” (Bertolino 2017, 140). Furthermore, the

observation and documentation of new sustainable practices in the mountains need encouragement not so much in the productivist direction, but in the function of maintaining the cultural landscape.

An exemplary case, in this sense, is the emergence in recent years in some areas of Piedmont of associations or activities that are attempting to reintroduce into the territory—on small expanses of land, at the moment—historically documented crops that have disappeared, converting marginal areas into productive areas, making it possible to reclaim uncultivated land or land that has suffered the advance of the forested area, thus restarting both the economic and the cultural and territorial supply chain, and moreover activating a network of knowledge and skills, of economic and human resources. These are forms of associationism that engage in new agricultural or handicraft initiatives closely linked to the trades and practices of the past, reworking and reusing them with a view to sustainability for the future. Some associations have been set up with the aim of supporting, developing and bringing back biodiversity: this is the case of the *Principi Pellegrini DiVangAzioni*, founded in 2013 in Sant’Ambrogio di Torino, which also intends to carry out projects of local micro-production and reproduction of its own seeds, in order not to depend on multinational seed companies and to have its own local products again.

Specifically in the Susa Valley, in the province of Turin, where in recent years I have been investigating forms of associationism linked to the topics of agriculture and sustainability,² forms of cultivation are being experimented with that are strongly respectful of the environment, based on ethical-productive positions experienced as practical militancy against the model of industrial agriculture (Rossi 2015): no chemical compounds are used and the fields, based on personal experimentation, are managed according to the principles of biodynamics, permaculture, and synergy³ (Lockyer and Veteto 2013). In this context, a network is developing between small cooperatives and individual companies that, by sharing their wealth of knowledge and practices, can reap the fruits both among themselves and for the outside world. There is no doubt that well-organized strategies for the conservation and enhancement of Alpine landscapes would make it possible to transform important portions of the territory into privileged regions, as can be seen in several Alpine and pre-alpine areas in countries bordering Italy, where agricultural and cultural landscapes are first and foremost sold, and with these, everything that can guarantee the quality of life for producers and users, such as the typical products that originate from these environments. In view of the fact that each territory is a heritage that includes memories, facts, relations, and values, identifying its typical features is the first step to be taken with a view to a promotion and development strategy: the policies aimed at the protection and enhancement of Alpine landscapes that are well

devised and communicated are better able to attract resources, starting with tourism, and to present an image, a brand, to external centers of power, that benefits all productive activities but also the local cultural initiatives.

A sort of quality mark of the territory, a strong point for attracting resources, both tourist and financial, are the collection, protection, and display of material evidence and the representation of the intangible heritage of a community's past. Undoubtedly, the cultural traits that we recognize as traditional are substantial ingredients in the development of an area, because they instill new vitality in local communities and are able to attract flows of visitors and tourists, often from afar. As we shall see, the community manifests its cultural specificity particularly in the festivals.

The recovery of discontinued crops can be defined as a socio-cultural reworking of the past, for which the term retro-innovation can be used. This notion concerns the development of knowledge and skills that combine elements and practices of the past, in a novel perspective and for original purposes (Stuiver 2006). Links between old and new, an interplay of elements of one and the other, traits of tradition are linked to those of the contemporary era. If previous experiences are fundamental for a process of innovation to take place, taking up Clifford's suggestion, we can speak of an articulation of tradition⁴:

articulation is the political connecting and disconnecting, the connecting and disconnecting of elements—the notion that each socio-cultural whole that presents itself to us as a whole is actually a sequence of historical connections and disconnections. Articulations and disarticulations are constant processes in the formation and re-formation of cultures. (Clifford 2004, 50)

In my opinion, this dynamism is partly attributable to the economic and socio-cultural rethinking—at European and world level—of the role of agriculture in society, stimulated by three elements:

a) a new ecological and health-conscious culture that pays close attention to the effects of human activity on the environment in general. In this sense, industrial agriculture is being contrasted with sustainable agriculture, which tends to be based on organic and traditional practices (Piermattei 2007);

b) deindustrialization and the crisis it generates in formerly industrialized places. This phenomenon of abandonment by the industry prompts many to look to agriculture as an economic alternative for local development through the valorization of the territory, its traditions and its typical products (Merlo 2006);

c) the growth in the use of the rural space for recreational, tourist and social purposes, which implies an openness on the part of agricultural activities to ex-

pand their range of services in line with new lifestyles and consumption patterns. This phenomenon is represented by the diversification of agricultural supply and the emergence of new business models: these include the agri-industrial enterprise, which, in addition to the cultivation of raw materials, also provides for the processing and marketing of products; the agri-tourism enterprise, which also offers recreational, tourist and cultural services; the rural enterprise, which also carries out para-agricultural activities, such as the management of riding stables, playgrounds, educational farms, or museum activities (Pérez-Vitoria 2007).

Events

IN ORDER to outline the forms that community life takes in Alpine marginal areas and the relational, material and cultural dynamics, together with the strategies that are reshaping them, I consider it useful to briefly describe and reflect on the festive events held in these territories.

One of the most relevant elements of the heterogeneous festive map that has emerged in recent decades in our country is the strong and constant development of proposals and initiatives that re-present the local, pre-industrial, peasant and artisan culture. It is certain that important exchange processes accompany these festivals and ceremonies, particularly those that can be traced back to the rural and mountain past, and that strong local social actors are engaged in them. This ceremonial responds to recognizable identity strategies and local interests: communities that have maintained, perpetuated or re-proposed a “traditional” festival find in the festive apparatus a valid instrument to offer an image of themselves to the outside world and to affirm their presence in a tourist or, in many cases, cultural geography. In the Western Alps, the persistence and revitalization of traditional ceremonies is accompanied by the invention of festivals closely linked to trades and practices of the past, which, in addition to being a place of encounter, confrontation, collaboration, and planning between the various actors of the local business community, offers them the opportunity to open up to the outside world. The reference to tradition is a powerful attractor of external users, because it is a “potentially unifying symbolic heritage that can be used to communicate certain experiences, inform about certain projects and potentially widen the network of stakeholders” (Cacchioni 2016, 72).

The collective threshing of ancient grains, educational walks to gather wild herbs,⁵ and the opening of ancient stone ovens to bake bread⁶ are “new” events that, with a significant consensus and following, are intended to safeguard local traditions but, at the same time, reveal a philosophy and a choice of life of those who promote them that favors quality, “believing that the opportunities offered

by an environment where it is pleasant and not stressful to live and raise one's children are a superior advantage that cannot be compared with an economic quantification" (Poli 2013, 20). They are also the practical manifestation of a flow of initiatives and trends, the outcomes of a new rurality experimenting with historically documented but now lost types of crops that are becoming an added value, the result of an interest in activities that in the past were fundamental to the local economy. This is the case, for example, of hemp, lavender, and rye.

In Italy, and throughout the world, after fifty years of near-abandonment of hemp cultivation,⁷ hemp sativa is being "rehabilitated" for the actual advantages of its cultivation and its new uses in the most diverse fields, allowing farmers and consumers to reintegrate into a self/eco-sustainable perspective, reintroducing a traditional crop from a more current perspective. In Piedmont, where in the past in some areas it was an essential livelihood for mountain and foothill communities, a number of associations have sprung up in recent years whose aim is to reintroduce and encourage both the cultivation of hemp and the marketing of hemp-derived products. For the same purpose, various initiatives have been undertaken in several localities, such as the collective hemp sowing festival and the restoration of the hemp routes historically used by the local population to take this crop to neighboring markets.

In the Western Alps, until the late 1960s, lavender, an indigenous plant of the Alpine regions, was "an important spontaneous resource and a commercial commodity involved in a widespread harvesting and distillation activity" (Glielmi 2017, 159) that engaged the entire community—in different ways depending on the location—for about a month starting in mid-July. In particular, from the mid-19th century, lavender became a fundamental economic resource for the population of the Gesso Valley in the Maritime Alps, whose calcareous soils favored this plant. It was used as a cosmetic, cleanser, medicine—even in veterinary medicine—and as a thermicide. The lavender economy died out due to several concomitant factors, including competition from synthetically obtained essences and the abandonment of agri-pastoral occupations; it should be added, as far as the Gesso Valley is concerned, that parts of the territory were "stolen" from this crop by hydroelectric plants and the opening of quarries (Glielmi 2017). The physical disappearance of lavender⁸ has also meant the loss of the knowledge and uses associated with it, which have recently recovered thanks to the growing consumer awareness of natural products and to the many farmers who have begun to diversify their production by starting to cultivate it. Many lavender fields in Piedmont are to be found in the Stura Valley, mainly in Demonte, where an ancient distillery, famous for the production of essential oil, is still active, and in the Susa Valley, which is the pedological limit for the spontaneous growth of the plant. Today its cultivation "takes place in the land-

scape shaped by man, made up of very exposed terraces, often reconverted from previous crops . . . and their recovery is also seen as having multiple functions, from education to tourism” (Bertolino 2017, 137–138). The owners of the terraces cultivated with lavender in Chiomonte also work with a view to sustainability, firstly because these are marginal, abandoned lands: no herbicides or chemical additives are used and weed cleaning is done manually, as are pruning and harvesting.

The rediscovery of lavender has generated a revival of the knowledge and know-how, but also of the community moments concerning it. In Sale San Giovanni (CN), in the Alta Langa, a small town with only 171 inhabitants, every year at the end of June, the “Non solo Erbe” takes place, a fair dedicated to aromatic and officinal herbs now at its 23rd edition: for three days, it is possible to visit farms and be guided on a panoramic route to see the lavender in bloom.

Representations of the harvest and distillation process and food and wine walks celebrate lavender in Andonno, a hamlet of Valdieri (CN), in the Gesso Valley. Here the Tabàs cultural group, supported by the Ecomuseo della Segale (see below), which is committed to restoring lavender cultivation,⁹ and the Parco Alpi Marittime, after in-depth historical research of contracts in municipal archives and documents in libraries and interviews with the local population, in 2006 established the festival called “Ai tèmp d’l’izòp.”¹⁰ It is held as part of the patron saint’s celebrations for Saint Eusebius, generally on the first Sunday in August, and features an excursion to the places where wild lavender is harvested, a market selling typical products and crafts, including lavender-based products, and a re-enactment in costume of the various stages in the harvesting of lavender in the valley: from the awarding of harvesting rights to traders at public auction, to cutting and transport, sale by weighing, and the distillation of the essence. This festival “is a time to present, in addition to ancient crafts, artefacts and traditional clothing, the recovery of the land used for cultivation today and to market the products obtained from it” (Bertolino 2017, 135).

Rye is the mountain cereal par excellence, even though it does not originate in the Alps, indispensable and fundamental for nutrition and everyday life until the 1950s: bread, straw for animal bedding, an excellent material, insulating and resistant, for roof construction. It is no coincidence that a saying from the Cuneo valleys goes “Lou sél l’è lou pan e lou pan l’è la vita” (rye is bread, and bread is life), and even today this cereal can represent an important resource for the economy because flour, beer and insulating materials for green building can be made from it. Interesting in this regard is the project “SECNALP—Recovery and Preservation of Ancient Rye (*Secale cereale*) of the Cuneo Alps” promoted by the Departments of Life Sciences and Systems Biology and of Agricultural, Forestry and Food Sciences of the University of Turin, presented in June 2019

in Roccaforte Mondovì, a municipality that has given its patronage to the initiative, which aims to develop and enhance the rye that is part of the rural culture of the Ellero Valley (<https://comizioagrario.org/il-ritorno-della-segale/>).

The municipality of Montescheno (Verbano Cusio Ossola province, VCO), in collaboration with the municipal primary schools and the Villadossola section of the CAI (Italian Alpine Club), has devised the “Via della Segale” (Rye Route) project, an itinerary along mule tracks and paths that touches on places where traces of ancient cultivation are still visible and the fractional ovens and ancient presses are almost all well preserved: the route allows visitors to rediscover the virtues of this cereal but also the past daily life of the local community. A rye festival is also held in this Val d’Ossola locality, which over a weekend includes a presentation of the cereal chain, themed tastings, and an exhibition of handicrafts (www.arecprotetteossola.it). A plant with a great adaptability, considered food for the poor even if it has always been recognized as curative and beneficial, it has almost completely disappeared in the Western Alps in the twentieth century, with the progressive conversion of cultivated fields into permanent meadows: as with lavender, the disappearance of this crop is attributable to various factors, including the aforementioned phenomenon of depopulation and abandonment of the highlands and the competition with the mechanized crops of the plains.

The project for the recovery of rye cultivation has involved public and private bodies in Valle Gesso, specifically the Rye Ecomuseum, based in Sant’Anna di Valdieri, the only permanently inhabited center (7 people) within its managing body, the Natural Park of the Maritime Alps: this institution is a

network of structures, activities and events distributed throughout the territory, born from the aspirations and knowledge of the inhabitants of the Gesso Valley and grown year after year thanks to the experts, services and resources made available by the Natural Park of the Maritime Alps. A shared path of recovery and cultural enhancement that has found its secret ingredient in rye. (www.ecomuscosegale.it)

Originally, the goal was to reactivate the production of this cereal to obtain straw for roofing according to the valley tradition¹¹: the experimentation started in two villages, Tàit Bartòla and Tàit Bariao, connected by an old path, the *Vidòl di Tàit*. The initial cultivation of a local ecotype, with very long and resistant stems, was accompanied by that of grain, part of a short supply chain that produced flour and beer.

Among the numerous initiatives implemented by the Ecomuseum,¹² one of the most important is the rye festival, which has been held regularly, every year, since 1992, during which the traditional threshing of the cereal with *cavaglie*,

the *correggiato* (flail),¹³ which took place in the first weeks of August in the courtyards, with the participation of the entire population, is re-enacted. The three days dedicated to the event include conferences, excursions, workshops, concerts, dances, a market of gastronomic and handicraft products, and a costume parade along the main street of the town.

Brief Reflections

FOR SOME years now, abandonment in the Piedmontese Alps has been limited by the phenomenon of a “return to the land”—understood here in its double meaning of re-inhabiting alpine spaces and dedicating oneself to abandoned trades—, by the investments of small entrepreneurs, by the initiatives of a part of the residents who experiment with virtuous practices for a more balanced and sustainable growth, and by the incoming migratory flows. The new inhabitants, those who re-inhabit the marginal areas, as well those who “remain” and, for various reasons—the reduced cost of living, the new job opportunities, the search for a close contact with nature and a peaceful environment—, in the last twenty years have managed to change and to draw attention to these territories and to give new and greater value to the relationship between mountains and cities, reaffirming it in terms of complementarity and not necessarily of dependence and subordination.

These people give a new meaning to the place where they reside and make positive contributions to the community, often seeking new forms of rurality and cultural and socio-economic models related to environmental sustainability. The local population presently claims the right to intervene in the destiny of the territories, with a newfound vocation for activism.

I have been able to attest that in some areas new practices are being generated and concrete solutions are being sought for a more balanced and sustainable growth; repopulation is linked to the creation of new jobs related to environmental recovery (soil protection and the arrangement of meadows and pastures), niche tourism, handicrafts, in order to give new prominence to local products and ensure the resumption of typical production activities, often a source of attraction in a social process that from cultural heritage comes to the enhancement of local resources and local development projects aimed at the future; many residents have established associations that promote the reintroduction of long-abandoned crops.

Some associations have been created with the aim of supporting, developing and restoring biodiversity and there are various initiatives that revive the local, pre-industrial, peasant and artisanal culture, combined with a phenomenon of

invention of festivals closely linked to crafts and the agri-pastoral practices of the past. This industriousness contributes to the creation and growth of the cultural heritage. In my opinion, in these contexts we identify the manifestation of a mode of production of culture, value and life for the territory that describes a decisive aspect of innovation with respect to the traditional practices of conservation and enhancement that we have come to know starting from the phenomenon of revival or folk revival.



Notes

1. The new arrivals do not always have a positive impact on the community: in some cases they are perceived as a threat to social cohesion and identities (Zanzi 2003).
2. The fieldwork was carried out as part of the project “Marginal Areas: Sustainability and Know-how in the Alps” (MASKA), financed by the Compagnia di San Paolo and for which I was responsible (2015–2017), the aim of which was to document some examples of possible responses to the concept of marginal lands, assessing their merits and limits, and to collaborate with the initiatives already existing in the Piedmontese Alps, also trying to coordinate residual initiatives of individual operators by bringing them together in an overall project supported by the entire community.
3. For biodynamic agriculture, which follows cosmic and lunar cycles, soil fertility and vitality must be achieved by natural means. Permaculture is an integrated design process that generates a sustainable and balanced environment that ensures the self-sufficiency of the communities living in it. Synergistic agriculture promotes production that utilizes the self-fertility of the soil by minimizing intervention and utilizing the activity of the organisms that inhabit it.
4. The concept of articulation is indebted to British cultural studies, in particular the work of Stuart Hall, who took up Gramscian theories in his essay “Notes on Deconstructing ‘the Popular,’” contained in the volume *People’s History and Socialist Theory*, edited by Raphael Samuel (London–Boston–Henley: Routledge & Kegan Paul, 1981), 227–240.
5. The trips are generally led by naturalist experts who illustrate the techniques of research and collection and the characteristics of the various edible wild herbs that the area has to offer. Often at the end of the walk, traditional dishes prepared with the presented herbs are tasted, so as to appreciate their nutritional and health value.
6. Some examples: in Tappia, a hamlet of Villadossola, and in Montecretese (VCO), the ovens are reopened to the public during local festivals and fairs. The ovens of Tetti Caresmin, Monte Alpet and Genola (CN) have also been returned to the communities, the latter used exclusively for the preparation of the *quaquare*, traditional biscuits to which a festival is dedicated in May. In Ostana (CN), bread is baked in August; in Signòls, a hamlet of Oulx (TO), the communal oven is used for rye bread and apple pie. In Valle d’Aosta, in Saint Denis, in the locality of La Plau, the “sagra

del gran forno” is held every year in January: the preparation of the bread starts early in the morning with the preparation of the dough, then the oven is heated and the loaves are put in the oven on long wooden planks.

7. In our country, the cultivation of hemp has been banned since 1975, as decreed by Law no. 685 of 22 December 1975 regulating narcotic drugs and psychotropic substances. The decline in hemp production began to manifest itself around 1954 due to the high cost of hemp fiber, caused by the failure to adapt the production system and the more modern and advantageous possibilities offered by cotton and synthetic fibers, especially as regards production techniques and costs (Bonato 2015).
8. “Some also report how, after a minimum of industrialization, harvesting was banned. In Val Chisone, for example, the ban was imposed by the municipalities” (Bertolino 2017, 134) as harvesting was the prerogative of a specific company.
9. The Ecomuseum’s intention was also to reintroduce lavender distillation, but this proved complicated due to tremendous bureaucratic red tape. However, in Valdieri, a young couple from Roccavione started up “a cultivation and distillation business called La rupe’ a few years ago” (Glielmi 2017, 167).
10. *Izòp* is lavender in the local dialect.
11. Some straw roofs were made in Andonno, a hamlet in the municipality of Valdieri (CN).
12. With the support of the Alpi Marittime Natural Park and the Municipality of Valdieri, and with the help of a local elderly man who had played it several times in his youth, in 2007 the Eco-museum reintroduced the mythical figure of the rye bear into the Valdieri Carnival after an absence of almost forty years.
13. An instrument used in the past for threshing cereals and other seed plants, it consists of two sticks joined together by a leather strap.

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Abstract

Marginal Areas, between Potential and Future Projects

Alpine areas in the last decades of the 20th century have witnessed a remarkable process of depopulation: the effects on the environment caused by the abandonment of agri-pastoral practices have extended beyond the local dimension, changing landscape features and cultural traditions and transforming these areas into marginal lands. For some years now, however, there have been various attempts throughout the Alps to reintroduce different types of historically-documented cultivation: this recovery, which is at once economic, cultural and touristic, plays a significant role in the interaction, collaboration and exchange between local communities and acts as a bridge between tradition and contemporaneity.

Keywords

Alps, local community, revitalization, entrepreneurial culture, festival, sustainability, value chains

Aree marginali, beni comuni Dalla “tragedia” alla creazione di valore

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La marginalizzazione deve essere scongiurata definendo orizzonti sostenibili, non miopi, al contrario: di lungo corso.

Patrimonio e risorse

IL PATRIMONIO, sia esso inteso in senso materiale o immateriale, costituisce la principale forma di ricchezza distintiva di un territorio: il contesto, così come i fattori naturali e culturali, infatti, ne determinano la peculiarità e unicità e sono gli elementi caratterizzanti che lo segnano, nel corso del tempo, in quanto eredità particolare.¹ Proprio in tal senso, il concetto di patrimonio assume ancor più una connotazione economica – guardando all’accezione etimologica di economia quale gestione delle risorse – e porta con sé una necessaria prerogativa di conservazione, che si accompagna – completandola – a quella, più nota, immediatamente comprensibile e facilmente apprezzabile, di valorizzazione. Soprattutto nel panorama europeo, la specificità – se non eccezionalità – del patrimonio lo rende il massimo fattore produttivo per l’attrattività e il posizionamento del continente nello scenario turistico mondiale.²

Poiché il turismo è un settore chiave dell’economia globale ed europea,

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a cui si è dovuta, negli anni, una parte rilevante dell'occupazione globale e del prodotto interno lordo – nonché un tasso di crescita superiore a quello dell'economia generale e una percentuale rilevante dei nuovi posti di lavoro creati negli anni 2014-2018³ –, è manifesta la crucialità del mantenimento dell'*heritage*, anche in chiave di sostenibilità economica, in quanto garanzia della durevolezza del risultato reddituale e, al tempo stesso, di un positivo impatto ecologico e sociale. I tre orientamenti – economico, ambientale e sociale – sono, infatti, interconnessi, non solo in senso teorico e filosofico,⁴ ma in quanto strategicamente inseparabili: la rimozione di uno di essi comprometterebbe l'equilibrio complessivo.

L'evento pandemico ha determinato in media una diminuzione del 72% degli arrivi globali nel 2020,⁵ con pesanti strascichi e conseguenze nell'anno successivo,⁶ portando a una crisi settoriale, a cui è seguita, a partire dal 2022, una ripresa via via più rapida, con rischi, in alcune aree, di impennate consistenti e di correlata complessità gestionale. Durante e dopo un momento di particolare ed estrema pressione, quale quello appena evocato, il patrimonio è pertanto soggetto a rischi che possono portare alla sua alterazione, se non al deterioramento, rivelandone la fragilità, drammatica evidenza di un valore spesso dato per scontato.⁷ Dal punto di vista scientifico – e al tempo stesso con evidenti implicazioni e conseguenze gestionali – giova fare riferimento alla linea teorica che descrive in modo plastico la condizione critica evocata. Si tratta dello studio dei “beni comuni” – di cui il patrimonio culturale e ambientale sono evidenti declinazioni – nonché, soprattutto, della “tragedia” che su di essi incombe o rischia di incombere.

Patrimonio come bene comune

SUL TEMA dei beni comuni ha focalizzato la propria attività scientifica Elinor Ostrom (1933-2012), prima donna insignita del Premio Nobel per l'economia nel 2009, esattamente per il suo lavoro sui *common goods*. La tematica affonda le radici nella pubblicazione di Garrett Hardin – *The Tragedy of the Commons*⁸ –, relativa alla gestione e all'uso dei patrimoni collettivi, rispetto ai quali l'autore indaga la prospettiva più complessa e problematica.

In particolare, lo studioso tratteggia un caso elementare, i cui elementi sono: un bene comune aperto a tutti – un pascolo, nella fattispecie –, una condizione ottimale – data dall'assenza di fattori esterni che potrebbero condizionare l'uso delle risorse condivise – e un gruppo di fruitori – i pastori – che esprimono interesse economico rispetto al possedimento collettivo. La domanda che ogni attore economico, quindi ogni allevatore, nell'esempio, si pone, è quale vantaggio possa derivare dall'incremento della propria capacità produttiva, ovvero

dalla crescita della propria mandria. Quest'ultima, infatti, usufruisce del bene comune, da cui attinge il nutrimento, rendendo sociale e, dunque, condiviso, il costo di un fattore produttivo. Lo stesso, di conseguenza, non viene apprezzato pienamente – o forse per nulla –, in quanto non percepito, se non in termini di beneficio, peraltro acquisito e non in discussione. Ecco allora che la concomitanza dei costituenti conduce a una coincidenza che sfocia in “tragedia”. Da un lato, infatti, è lampante la convenienza che deriva al singolo pastore dalla futura vendita dell'animale aggiunto. Dall'altro, vi è il riflesso comune, cioè il consumo del patrimonio pubblico e, alla lunga, il suo progressivo esaurimento, fino al deterioramento, dovuto all'eccessiva presenza di animali. Tuttavia, l'impatto dell'aumento di capi di bestiame è distribuito, frazionato tra tutti gli allevatori: ne consegue che il risvolto negativo venga percepito da ognuno di essi in maniera minore, residuale, pressoché nulla e che, razionalmente, ogni aggiunta venga ritenuta possibile, quasi all'infinito. Ciò, ovviamente, si ripete un animale dopo l'altro e per ogni pastore. Il sistema stesso, dunque – conclude Hardin – spinge l'uomo a ragionare in termini di crescita illimitata, pur a fronte di una risorsa – comune – limitata. In realtà, l'uso esponenziale del *common* non solo tende a comprimerne la disponibilità, ma rallenta la sua capacità di rigenerarsi e di essere, dunque, nuovamente fruibile per i beneficiari attuali, situazione che peggiora ulteriormente in una visione temporale più ampia, che considera quelli potenziali futuri. Ecco, dunque, il patrimonio sottoposto a un dramma, in cui l'utilizzo è frutto di scelte del singolo che hanno impatto collettivo, oppure di scelte collettive, che naturalmente impattano sul singolo. In generale, si pone un dilemma rispetto al vantaggio, all'uso attuale, nonché alla disponibilità successiva.

Dopo Hardin, Olson,⁹ centra un punto cruciale del ragionamento sui beni comuni e sulla relazione che l'individuo instaura con essi e con la popolazione di utilizzatori: la presunzione che vi sia una logica correlazione tra azione dei gruppi e loro interessi, per cui la moltitudine dovrebbe agire in direzione plurale. L'affermazione appare sensata, in sé, ma, alla luce del caso proposto da Hardin – in cui l'uso eccessivo del patrimonio non viene percepito come rischioso, poiché lo svantaggio è condiviso, mentre il vantaggio che ne deriva è individuale – le scelte “razionali” vanno contro tale logica, generando, per l'appunto, una tragedia. In questo solco, si inserisce il lavoro della Ostrom,¹⁰ in cui l'autrice scrive che, se non vi è modo di escludere nessuno dai benefici forniti da altri, chiunque è motivato a non contribuire al lavoro comune e, invece, a sfruttare gratuitamente quello altrui. Lo stesso ragionamento può essere fatto, in generale, per le risorse – essendo, peraltro, il lavoro stesso una risorsa o una fonte di risorse – e, ovviamente, per il patrimonio, in quanto mezzo nodale. Il non agire in relazione all'“altro” e, quindi, al gruppo, significa tenere un comportamento,

secondo l'autrice, da *free-rider*, individualista, che ovviamente invalida la possibilità di conseguimento di un beneficio sociale.

Ostrom propone tre soluzioni alla “tragedia dei beni comuni”, la prima delle quali è pubblica, tipicamente segnata da un eccesso di burocrazia, che perde, dunque, efficienza. L'alternativa percorribile sarebbe una via privatistica, di certo efficiente, ma che si tradurrebbe, alla lunga, in un diritto esclusivo e, pertanto, in una contraddizione in termini rispetto al concetto stesso di bene comune. Infine – ed è questa la strada principale, seppur complessa e, in più, da tracciare, che la studiosa indica – vi è un'“alternativa”, fondata su un “contratto” che vincoli le parti a una generale strategia collaborativa. In questa terza ipotesi, senza dubbio quella più articolata – per via dei diversi interessi delle parti –, gli *stakeholder* sono tutti ugualmente implicati e responsabilizzati, a patto che si individuino, coralmemente, criteri e regole partecipate per la gestione del *common*.

Rischi e soluzioni

IL PATRIMONIO insostituibile – naturale e culturale – affidato a questo momento storico, già funestato dalla complessità del Covid-19 e da ulteriori fattori di difficoltà e incertezza, va difeso contro la tragedia dei beni comuni. Sono perciò necessarie indicazioni generali, concepite collettivamente e coralmemente accolte, per gestire, valorizzare e mantenere un elemento tanto indispensabile quanto delicato. Fondamentale è senza dubbio la consapevolezza del rischio, così come quella delle opportunità e, in ogni caso, è imprescindibile la ricerca di equilibrio e bilanciamento, così come la presa di coscienza e la scelta del fine condiviso.

Dal dilemma sopra brevemente analizzato non sfugge nessuna destinazione: nemmeno un luogo iconico come la thailandese Maya Bay, location del film *The Beach* (2000) con Leonardo DiCaprio, danneggiata da un progressivo inquinamento dettato dall'assenza di controllo rispetto al fenomeno di *overtourism* che l'ha interessata, in seguito al successo della pellicola. Solamente la chiusura per 3 anni, tra il 2019 e il 2022 e l'inserimento di indicazioni stringenti, che impongono limiti territoriali, temporali e numerici all'accesso di visitatori, ha consentito di ripristinare, per il momento, un equilibrio ecologico – e, in un medio-lungo periodo, sociale ed economico – che rischiava di essere definitivamente compromesso.

Tuttavia, il raggiungimento di una nuova stabilità, consapevolmente sostenibile, non è stato privo di difficoltà gestionali, impatti sugli *stakeholder* e conseguenze connesse al disallineamento dei bisogni e delle istanze di operatori economici, residenti, istituzioni, visitatori.¹¹ Il nodo centrale è, infatti, il coinvol-

gimento dei portatori di interesse, tutt'altro che immediato, per nulla scontato, nella maggior parte dei casi segnato dall'aspirazione e al contempo dalla miopia individuale o di categoria, che frena una prospettiva multi-sfaccettata e completa. Solo nell'*engagement* e, soprattutto, nella crescita di conoscenza e consapevolezza – quale fattore più evidente e funzionale di *empowerment* – degli *stakeholder*¹² rispetto all'urgenza e al comune interesse, oltre che al valore universale della soluzione della compromissione del bene comune, è insita la chiave di lettura per l'appianamento e la gestione di situazioni pregiudicate. Ovviamente, i casi estremi devono divenire *case history* e mettere in luce, una volta ancora, il ruolo di magistralità della storia nel prevenire analoghe derive.

Aree marginali: Prospettive, oltre i margini

SE IL pericolo è in agguato in destinazioni dotate di risorse e attrazioni capaci di enorme e immediata attrattività, l'insidia cresce quando si prendono in considerazione aree rurali o marginali, che, in sé, già racchiudono difficoltà territoriali, sistemiche e gestionali. Alla fragilità strutturale, infatti, si sommano – moltiplicando, di fatto, le incognite – rischi ulteriori, che proiettano uno scenario dai tratti distintivi della tragedia. È, o potrebbe essere, questo, il caso della nota area italiana delle Langhe, in relazione alla quale stanno crescendo, in tempi recenti, interrogativi, allarmi, ma anche nuove sensibilità per soluzioni attente e durevoli.

La zona, a vocazione agricola, ha vissuto, in passato, le profonde difficoltà sociali ed economiche della vita contadina¹³ e, tuttavia, proprio la dimensione rurale ne ha consentito, nel tempo, il riscatto. La progressiva – seppur non priva di momenti di estrema criticità e crisi¹⁴ – presa di coscienza dell'importanza e del potenziale della produzione vitivinicola ha modificato la condizione socio-economica locale e, addirittura, ha modellato in modo indelebile e, al tempo stesso, significativo e iconico, il territorio. È, questa, infatti, la motivazione fornita dall'UNESCO per l'inserimento, nel 2014, dell'area Langhe-Roero-Monferrato nella lista del patrimonio mondiale:

i paesaggi culturali vitivinicoli del Piemonte di Langhe-Roero e Monferrato sono una eccezionale testimonianza vivente della tradizione storica della coltivazione della vite, dei processi di vinificazione, di un contesto sociale, rurale e di un tessuto economico basati sulla cultura del vino. La loro storia è testimoniata dalla presenza di una grande varietà di manufatti e architetture legate alla coltivazione della vite e alla commercializzazione del vino. I vigneti di Langhe-Roero e Monferrato costituiscono inoltre un esempio eccezionale di interazione dell'uomo con il

*suo ambiente naturale: grazie ad una lunga e costante evoluzione delle tecniche e della conoscenza sulla viticoltura si è realizzato il miglior adattamento possibile dei vitigni alle caratteristiche del suolo e del clima, tanto da diventare un punto di riferimento internazionale. I paesaggi vitivinicoli di Langhe-Roero e Monferrato incarnano l'archetipo di paesaggio vitivinicolo europeo per la loro grande qualità estetica.*¹⁵

Come noto,¹⁶ l'inclusione tra i siti UNESCO si caratterizza per impatti positivi, ma non è priva di riflessi negativi, o che necessitano, comunque, di attenzione, per via della crescita di reputazione e dei problemi che alla stessa sono connessi. Nel caso delle Langhe, non è mancato un importante riconoscimento dell'area e il risultato turistico derivato è stato crescente, ma, a distanza di 10 anni, affiorano i primi impatti, segnali di pericolo, alcune prese di posizione e voci negative, a causa di una condizione talvolta percepita come insostenibile e, parallelamente, si strutturano serie valutazioni sugli sviluppi venturi. Il tema – come illustra in un'intervista¹⁷ il direttore dell'Agenzia Turistica Locale Langhe-Monferrato – ha implicazioni ambientali, economiche ed etiche, in quanto la presenza turistica può modificare le abitudini dei residenti, sottolineando un “limite” molto forte, che accompagna l'opportunità turistica. Il fenomeno non viene quindi inquadrato, a oggi, come *overtourism*, ma l'accostamento all'argomento è immediato, in quanto l'area specifica ha altri “limiti”, dovuti allo spopolamento, che arriva fino al 50% della popolazione, a cui si aggiunge il suo invecchiamento, acuito dall'assenza di nuove generazioni.

Imprescindibile, a maggior ragione in una fase ancora recuperabile, il ritorno – come sguardo alla teoria e come riallineamento alla consapevolezza dei patrimoni locali – ai *common good* e alle soluzioni proposte da Ostrom. La ricostruzione della comunità è il fulcro della risoluzione: spopolamento, invecchiamento e mancato rinnovamento sono superabili solo nella ricostituzione di un nucleo che viva la dimensione locale e ne sia presidio e custode, oltre che beneficiario e fruitore. Occorre, poi, individuare, definire e concordare regole comuni tese all'obiettivo della valorizzazione – anche in senso economico – del patrimonio, rispetto alla quale quella turistica è di certo la via più immediata, ma che richiede gestione e governo. In tal senso, la scelta della “progettazione turistica partecipata”, proposta dall'Agenzia Turistica Locale per definire gli obiettivi attesi in vista del – e in linea con gli obiettivi dell'Agenda – 2030, che ha visto il coinvolgimento di 120 *stakeholder*, con la partecipazione dell'Agenzia Nazionale per il Turismo, della *Destination Management Organization* regionale, di UNWTO e il supporto di un comitato scientifico internazionale,¹⁸ è probabilmente la forma di *stakeholder engagement* più funzionale. L'area non può, infatti, rischiare di perdere la propria identità¹⁹ e, al contempo, la risorsa

turistica, che insiste su quella patrimoniale, deve avere una visione disegnata e un controllo guidato dai portatori di interesse. Ciò può consentire la resilienza di un territorio non più necessariamente “marginale”, ma in cui si crea un nuovo tipo di confinamento: quello di una sorta di riserva turistica svuotata della dimensione locale e disneyficata.²⁰ La marginalizzazione deve essere scongiurata definendo orizzonti sostenibili, non miopi, al contrario: di lungo corso.

Guardando alla lettura di Barney,²¹ che intreccia *Resource-Based view* e *Stakeholder Theory*, la prima risorsa – forse il primo patrimonio – da preservare e mettere in luce è proprio quello delle relazioni con i portatori di interesse, senza i quali la destinazione si desertifica. Questo approccio è morale e funzionale, responsabile e strategico²² in chiave di creazione di valore, poiché stimola l’*empowerment* di *stakeholder* che si riappropriano dell’*heritage* e del valore sotteso e potenziale, lo moltiplicano e lo diffondono,²³ scongiurando l’*overtourism* e superando confini passati, presenti e futuri.



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Abstract

Marginal Areas, Common Goods: From “Tragedy” to Value Creation

The importance of local heritage becomes even more relevant in marginal areas. It is therefore necessary to identify shared management rules, based on stakeholders engagement and empowerment, in order to replace and overcome the risk of heritage erosion with value creation.

Keywords

heritage, common goods, tourism, marginal areas, stakeholders, value creation

Prospettive narrative per la Valgrisenche

La scrittura territoriale come chiave di ridefinizione turistica della marginalità

ROBERTA SAPINO

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Nel presente saggio si è voluto dare conto delle strategie comunicative prevalenti mediante le quali i romanzi firmati da Amos Cartabia contribuiscono alla “costruzione sociale” di una destinazione turistica “marginale”.

Introduzione

CON UN documento del 1994, l’Organizzazione per la cooperazione e lo sviluppo economico individua nel turismo la strategia da perseguire prioritariamente al fine di arginare, e idealmente di controbilanciare, il declino delle regioni rurali in atto nei paesi sviluppati del mondo. Sin dalle prime pagine, il documento riconduce – seppure *en passant* – il turismo rurale a un’altra forma del viaggio di piacere, ovvero il turismo letterario:

Rural tourism is not totally new. Interest in countryside recreation grew in the nineteenth century as a reaction to the stress and squalor of the expanding industrial cities. Writers

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Le ricerche qui presentate si inscrivono nelle attività del progetto PNNR – PE 5 CHANGES (Cultural Heritage Active Innovation for Next-Gen Sustainable Society) – Spoke 9 CREST (Cultural Resources for Sustainable Tourism).

*such as Wordsworth and Schiller captured the romanticism of the rural scene. The new railway companies capitalised on this emergent interest by transporting tourists to the countryside.*¹

Se nel corso dell'Ottocento gli strati privilegiati della società cominciarono a manifestare un interesse crescente per la pratica del soggiorno lontano dallo spazio cittadino, e se le compagnie ferroviarie poterono capitalizzare su tale interesse – peraltro investendo su quelle infrastrutture che avrebbero poi reso il viaggio accessibile alle categorie sociali più modeste – fu anche grazie agli autori e ai poeti che volsero lo sguardo verso quei territori, e che attraverso le loro opere diedero vita a immaginari destinati a radicarsi così saldamente nella società da arrivare a sovrapporsi, in alcuni casi, alla configurazione reale dei territori stessi.²

È indubbio che, oggi come già nel passato, la capacità delle opere letterarie di stimolare la curiosità del pubblico può rappresentare uno strumento importante per far conoscere – e far visitare, con tutte le implicazioni sociali che l'indotto turistico porta con sé – luoghi diversi dai grandi centri urbani. D'altronde, nel panorama culturale attuale non mancano gli autori e le autrici che, consci del potere pragmatico delle narrazioni di orientare i gusti e i comportamenti dei lettori, concepiscono i loro testi come veri e propri atti comunicativi finalizzati alla valorizzazione di un dato territorio in ambito turistico, spesso lavorando in sinergia con una varietà di attori e *stakeholder* locali.

Alla luce di queste considerazioni, il presente saggio sarà dedicato all'analisi critica di un esempio di comunicazione turistica fondata sulla narrazione – nello specifico, sulla scrittura poliziesca – firmata dall'autore lombardo Amos Cartabia e destinata alla promozione del comune di Valgrisenche, in Valle d'Aosta, e dell'area circostante. Dopo aver ricostruito il contesto culturale e mediatico in cui si iscrive l'iniziativa, si indagherà come i testi riflettano le ambizioni di una comunità intenzionata a ricavarsi uno spazio di maggiore rilievo all'interno di circuiti turistici rispetto ai quali – anche in virtù della sua ubicazione, incastonata tra i due grandi poli di attrazione costituiti dal Monte Bianco e dal Gran Paradiso – occupa ancora una posizione di relativa marginalità.

La narrazione poliziesca, uno strumento al servizio delle aree marginali?

NELLA NOSTRA contemporaneità, caratterizzata da processi di democratizzazione tanto della cultura umanistica³ quanto delle pratiche di viaggio,⁴ il turismo incentivato dai libri assume dimensioni e potenzialità profondamente differenti rispetto a quelle che caratterizzavano il “pellegrini-

naggio letterario”⁵ praticato dalle élites dei secoli scorsi.⁶ Mentre i mezzi di trasporto e le infrastrutture legate alla mobilità rendono ormai possibile raggiungere anche gli angoli più remoti di un territorio con relativa facilità e a costi spesso piuttosto limitati, e così contribuiscono ad ampliare sostanzialmente la platea dei viaggiatori potenziali,⁷ analoghi processi di popolarizzazione intervengono a incrinare gli assetti tradizionali del campo letterario.⁸ Da un lato, le varie piattaforme per la comunicazione digitale e per l’autopubblicazione agevolano sia la massificazione della scrittura, sia l’intercettazione di un pubblico estremamente ampio e variegato. Dall’altro, la lettura non è più – come era in passato – un fatto essenzialmente privato, ma diventa una pratica conviviale, sociale, o in molti casi *social*. Infine, il ruolo stesso dell’autore – nonché le aspettative a esso legate – sembra vivere una fase di rinnovamento profondo: pur con tutte le eccezioni del caso, lo scrittore o la scrittrice della contemporaneità tende a esporsi mediaticamente, prendere parte a dibattiti d’ordine non esclusivamente letterario, partecipare a una pluralità di iniziative comunicative.

È in questo contesto che si diffondono forme diverse di narrazione “del territorio” cui si richiede – come riassume Cristina Trincherò – di assolvere a una funzione duplice: a livello sociale, la letteratura “stimola e comunica la cultura, da intendersi in termini di sensibilità, verso questioni, temi, significati e luoghi nelle loro peculiarità”; sul piano turistico, essa è chiamata a “provvedere spunti per forme di turismo di prossimità, garantendo, nella fase applicativa dell’ideazione e nella composizione di percorsi, contenuti utili e spesso originali per disporre di idee e materiali destinati a dare forma a ‘prodotti’ turistici e di valorizzazione”.⁹ Così, mentre i confini tra la scrittura “alta” e quella “paraletteraria” si fanno sempre più porosi, forme diverse di narrazione “transitiva” – ovvero finalizzata a uno scopo ulteriore rispetto a quello puramente artistico ed estetico – intervengono nel panorama culturale per costruire, diffondere e costruire immaginari legati a luoghi precisi, in molti casi con l’intenzione esplicita di far conoscere e apprezzare aree “marginali” perché geograficamente remote oppure perché poco – o non del tutto – valorizzate all’interno dei circuiti turistici principali.¹⁰ E, complementariamente ai testi, a circolare tra le comunità dei lettori e visitatori sono gli autori e le autrici, coinvolti in prima persona in attività culturali e turistiche di vario genere: dai corsi di scrittura specializzati nello storytelling territoriale¹¹ alle visite guidate presso musei e luoghi d’arte.¹²

Tra le forme di scrittura del territorio animate da finalità di valorizzazione turistica, la narrativa poliziesca occupa un ruolo di primo piano. Sviluppatesi in relazione stretta con lo spazio urbano, del quale registra le potenzialità, le tensioni e le inquietudini,¹³ a partire dagli anni Ottanta, e con una notevole intensificazione negli anni Dieci del Duemila, il romanzo giallo si interessa in-

fatti – non certo per la prima volta in assoluto, ma per la prima volta su ampia scala e secondo modalità di approfondimento fino ad allora inedite¹⁴ – a contesti geografici e sociali considerati “marginali”: cittadine, paesi, villaggi situati in aree rurali, montane o costiere; insediamenti parzialmente o del tutto abbandonati; località fisicamente e culturalmente distanti dai grandi poli metropolitani. Si tratta di una produzione tanto ampia quanto varia, attraversata da linee di tendenza che la critica contemporanea ha solo recentemente cominciato a rilevare e che spaziano dall’evocazione del folklore locale in chiave passatista-conservatrice alla rivendicazione politica regionalista, dalla militanza ecologista o antiglobalista alla volontà di attrarre forme di capitale – economico, culturale, simbolico – e flussi turistici verso comunità decentrate.¹⁵

Come ben dimostrano gli studi di Natacha Levet e di Franca Pellegrini,¹⁶ ridurre questa scrittura territoriale “di consumo” a una mera funzione “di ufficio turistico”¹⁷ corrisponderebbe a negarne la complessità e a ignorare la rete di modelli, riferimenti e propositi su cui essa si costruisce. Tuttavia, in Italia così come nei paesi limitrofi, è ormai abbondante la produzione di narrazioni rispetto alle quali tale prospettiva è rivendicata in maniera esplicita e perseguita attivamente. Numerose case editrici, per lo più di dimensioni piccole o medie, propongono collane di romanzi polizieschi di interesse regionale, vendute in libreria, online oppure sfruttando canali meno usuali come le edicole¹⁸ e i centri di informazione per visitatori, e pensate per raggiungere un pubblico composto da almeno due grandi categorie: gli abitanti dei comuni in cui sono ambientate le vicende o delle aree limitrofe, interessati a (ri)scoprire sotto una nuova luce i luoghi che considerano familiari e potenzialmente inclini a intraprendere forme di “turismo di prossimità” incentivate dalla lettura, e i visitatori provenienti da regioni più lontane, che proprio grazie ai testi possono scoprire l’esistenza di borghi fino ad allora sconosciuti, immaginarne le atmosfere e poi, una volta in viaggio, addentrarsi servendosi dei romanzi come di guide turistiche “alternative”.

Le narrazioni firmate da Amos Cartabia e dedicate all’area della Valgrisenche, che saranno oggetto di analisi più ravvicinata nelle pagine seguenti, rispondono a tutti i requisiti finora enumerati, a partire dalla non celata corrispondenza di fondo tra la scrittura poliziesca e l’intento comunicativo di tipo turistico. Già in *Valgrisenche: Nel silenzio del ricordo*, il primo testo che l’autore ha dedicato alla località valdostana nel 2013, tra i ringraziamenti sono inclusi i lettori, rispetto ai quali l’autore auspica che il romanzo “possa un giorno portarli ad assaporare questo luogo; possa invogliarli a salire a Valgrisenche, ad ammirare le sue straordinarie ricchezze”.¹⁹ E analoghi inviti al viaggio spiccano nei paratesti degli altri tre volumi sui quali ci si soffermerà in questa sede, che pure non esauriscono l’abbondante produzione di Cartabia dedicata alla valle²⁰: il poliziesco *Valgri-*

senche: Gli occhi della morte,²¹ il thriller distopico *Valgrisenche: L'ultimo paradiso segreto*²² e il racconto per ragazzi, anch'esso di impianto poliziesco, intitolato *Il mistero della madonnina di Valgrisenche*.²³

Tra la marginalità e il cosmopolitismo

TRA LE motivazioni che solitamente inducono l'individuo a intraprendere un viaggio di tipo letterario, le più frequentemente rilevate dagli studi sul tema sono la volontà di visitare i luoghi in cui un autore celebre ha abitato e operato, ha vissuto esperienze eclatanti oppure è morto; la curiosità di scoprire dal vivo le località che fanno da sfondo ai racconti più amati; e il desiderio nostalgico di ritrovare emozioni, spesso associate all'infanzia, legate alla fruizione di una certa opera.²⁴ Nella nostra contemporaneità, caratterizzata da una prospettiva che una certa tradizione di studi definisce come "post-turistica",²⁵ a queste motivazioni se ne aggiunge una ulteriore, di più difficile definizione poiché di portata "trasversale" e meno direttamente legata a fatti oggettivamente verificabili come possono essere un dato biografico o la presenza di un toponimo nella storia: il proposito di fare l'esperienza diretta di una costruzione sociale di matrice narrativa, avendo la consapevolezza dell'artificiosità di tale matrice e, ciononostante, ricercandola attivamente.²⁶

Come osserva Herbert, al giorno d'oggi "literary places are no longer accidents of history, sites of a writer's birth or death; they are also social constructions, created, amplified, and promoted to attract visitors"²⁷: che un luogo diventi meta di turismo letterario non dipende più necessariamente da una casualità storica (ad esempio che vi sia nato un autore o un'autrice celebre), ma può essere il risultato di una serie di operazioni – anche narrative – appositamente orchestrate per insignirlo di un determinato prestigio culturale e simbolico. Strettamente correlato a questo slittamento è la varietà dei profili degli scrittori rappresentanti del cosiddetto "romanzo del territorio" in chiave rurale e montana: non solo autoctoni desiderosi di esprimere il proprio punto di vista sui luoghi che sono loro familiari, ma altresì

persone che la montagna ha "adottato" nella loro fuga, temporanea o definitiva, dalle zone urbane; scrittori di professione e non, che vogliono raccontare le proprie terre d'origine o di elezione, e che non abbisognano più di un'ambientazione inedita per le proprie storie, giacché il sistema del turismo, della villeggiatura e dell'intrattenimento offre già loro tutto ovunque; sono autori accuratamente informati sul mondo di cui vogliono parlare, perché le risorse mediatiche portano in casa di ciascuno ogni dettaglio, senza muoversi: pertanto, non devono imparare la

*montagna se non vivendone l'esperienza diretta – e di questa esperienza personale intendono mettere a parte il lettore.*²⁸

Ben corrisponde a questa seconda categoria di autori Amos Cartabia, scrittore di origine lombarda e tuttora attivo in Lombardia – la casa editrice A.Car., da lui fondata, ha sede in provincia di Milano – per il quale la narrazione della Valgrisenche non è il primo progetto di valorizzazione letteraria di un territorio. Autore di “local thriller”²⁹ da circa un ventennio, ovvero da ben prima che il genere – nelle sue varie declinazioni e denominazioni³⁰ – conoscesse la popolarità di cui gode attualmente, Cartabia si dedica infatti alla narrazione di luoghi di potenziale interesse turistico, tra i quali spicca il Castello di Sorci, sito in provincia di Arezzo, che porta all’attenzione del pubblico mediante diverse tipologie testuali, nonché prestandosi in prima persona per letture animate, visite guidate e altre iniziative culturali.³¹

Non siamo dunque in presenza di un autore “autoctono”, bensì di un individuo che, come i lettori ai quali idealmente si rivolge, ha imparato a conoscere e ad apprezzare la Valgrisenche nelle vesti del visitatore: prima da ragazzo, nelle estati passate in colonia proprio in questa valle, e poi da adulto, dotato di una maggiore consapevolezza riguardo alla realtà culturale e sociale del territorio. La prospettiva da cui l’autore osserva e racconta la valle è dunque “ibrida”, poiché in essa coesistono lo sguardo “esterno” del turista – turista “abituale” certo, e particolarmente informato sulla sua destinazione, ma pur sempre animato da curiosità e, talvolta, all’oscuro di alcuni fatti – e quello “interno” di chi non soltanto frequenta la regione da lungo tempo, ma ha cura di integrare nella narrazione quelle conoscenze storiche, culturali e memoriali acquisite grazie a un minuzioso lavoro di documentazione e al dialogo continuo con gli operatori del settore turistico locale e con coloro che abitano da sempre la valle.

Nella diegesi, tale prospettiva è restituita grazie alla creazione di protagonisti anch’essi contemporaneamente legati alla valle ed estranei alle sue dinamiche più intime. Andrea, il protagonista di *Valgrisenche: Nel silenzio del ricordo* e di *Valgrisenche: Gli occhi della morte*, è un architetto italiano che da lungo tempo si è trasferito a New York, ed è costretto a tornare in Valgrisenche a seguito di un evento che minaccia di riportare alla luce un fatto sanguinoso in cui era stato coinvolto – insieme a un gruppo di amici – proprio durante un’estate passata lì in colonia. In *Valgrisenche: L’ultimo paradiso segreto*, ambientato in una proiezione particolarmente tetra di un futuro non troppo lontano, nel quale dopo il Covid-19 incombe sull’Europa una catastrofe nucleare, è narrato attraverso la voce di uno scrittore lombardo determinato a portare a termine una complessa serie di azioni rischiosissime pur di preservare intatto il territorio che più gli è caro. Ne *Il mistero della madonnina di Valgrisenche*, infine, al cuore dell’intrigo

vi è un gruppo di ragazzini dei giorni nostri (la storia è ambientata nel 2018), rappresentati con lo smartphone in mano e molto affezionati a Valgrisenche, dove trascorrono abitualmente le vacanze insieme alle famiglie.

Che siano adulti o adolescenti, tutti i personaggi principali sono accomunati dal fatto di non risiedere stabilmente a Valgrisenche, ma di nutrire un affetto sincero per il luogo, le sue bellezze naturali, la sua cultura e i suoi abitanti. In virtù di tale scelta stilistica, a essere integrato nella narrazione non è soltanto il punto di vista dell'autore, il quale attraverso la scrittura condivide la propria esperienza del luogo, ma altresì quello del lettore-visitatore, rispetto al quale la narrazione esercita una funzione comunicativa di tipo pragmatico: invitarlo a recarsi di persona in Valgrisenche, suggerendo che se anche lui – adulto o bambino che sia – vorrà scoprire la valle, ne ricaverà un'esperienza memorabile, capace di accompagnarlo per tutta la vita.

Un ulteriore effetto comunicativo, di particolare rilievo nel contesto di un'iniziativa finalizzata alla valorizzazione turistica, è strettamente correlato alle modalità di costruzione dei personaggi appena illustrate. Nelle narrazioni è talvolta menzionata l'ubicazione "marginale" della Valgrisenche, collocata tra il massiccio del Monte Bianco e il Gran Paradiso, ma per lo più esclusa dai grandi circuiti turistici a essi collegati: una caratteristica che tende a imporsi a livello comunicativo e intorno alla quale prende forma un immaginario fortemente connotato, alimentato – nel mondo extradiegetico – da una stampa specializzata che sceglie volentieri titoli come *Valgrisenche: 3 sentieri nella Valle d'Aosta sconosciuta*³² e che spesso la descrive come nascosta, "quasi schiacciata" in mezzo alle due punte più celebri.³³ Se è vero che tale condizione di marginalità è spesso associata a valori percepiti positivamente, benché di difficile definizione, come l'autenticità, la purezza e l'incontaminazione paesaggistica – tutti elementi che sono ampiamente elogiati anche nei romanzi di Cartabia e soprattutto in *Valgrisenche: L'ultimo paradiso segreto*, dove proprio l'isolamento è ciò che salva gli abitanti dalla catastrofe ambientale – è vero anche che una prospettiva contraria sembra circolare sia nei testi, sia nella realtà in cui essi intervengono,³⁴ secondo la quale la marginalità è percepita come un limite importante per lo sviluppo della comunità locale.

In questo contesto, la finzione romanzesca si rivela allora uno strumento importante per controbilanciare – almeno discorsivamente, con l'auspicio di un'effettiva concretizzazione – tale effetto di isolamento. La creazione di una pluralità di personaggi di provenienze varie, persino cosmopoliti, e la rappresentazione della loro volontaria, e per lo più entusiastica, convergenza verso la valle contribuisce a ri-orientare l'immaginario esistente intorno alla località, la quale emerge come uno spazio che, pur essendo geograficamente isolato e ancora relativamente poco frequentato dai turisti, è anche saldamente connesso al

resto del territorio italiano, e più in generale al resto del mondo, da una rete di relazioni personali, culturali, economiche di non poco conto. Oltre ad Andrea, protagonista dei primi due romanzi, sulla cui vita newyorkese la voce narrante indugia a lungo, basti pensare all'uomo misterioso delineato in *Valgrisenche: L'ultimo paradiso segreto*, probabilmente affiliato alla criminalità organizzata internazionale ma disposto a sostenere economicamente l'impresa collettiva per la salvaguardia del comune di Valgrisenche.³⁵ E, relativamente a *Il mistero della madonnina di Valgrisenche*, sin dalla prima pagina il paese è discorsivamente collocato in un immaginario spaziale molto più ampio e internazionale, al di là dei confini geografici e temporali, grazie alla descrizione degli oggetti esposti – senza alcun ordine gerarchico – nella cameretta di uno dei giovani protagonisti:

*[Paolo] Si voltò, mentre la luce della lampada posta sulla sua scrivania illuminava solo quel piccolo spazio attorno a lui, lasciando poi semplice ombra e semplici disegni appoggiati alle pareti della sua camera. Lo spazio... le missioni della NASA... l'antico Egitto... i suoi libri e quella bella immagine della Madonnina di Valgrisenche.*³⁶

A costruire l'immagine di un luogo contemporaneamente marginale – soprattutto nell'accezione positivamente connotata di “pacifico”, “incontaminato” – e connesso con le dinamiche dei grandi centri culturali contribuiscono altresì i passi in cui si spiega che, per ragioni storiche accuratamente dettagliate nel romanzo, la statua della Vergine esposta in una piazzetta di Valgrisenche è una copia esatta di quella, celeberrima, che campeggia sulla guglia del Duomo di Milano. Il fatto è senza dubbio interessante, nonché di notevole rilievo nell'ottica di un'efficace valorizzazione del patrimonio architettonico e artistico locale. Tuttavia, la scelta di farne il fulcro di un intrigo, come avviene in *Il mistero della madonnina di Valgrisenche*, potrebbe produrre almeno due risultati supplementari.

Il primo consiste nel ribadire una sorta di affinità storica tra Milano – che a oggi è la città di provenienza di molti dei visitatori che si recano a Valgrisenche – e la valle, e così agire sul piano emotivo per incentivare più ampi flussi turistici dalla Lombardia:

*Noi siamo sempre stati legati, grazie alle caserme militari di controllo del confine, con popolazioni che venivano da ogni luogo, soprattutto da Milano e penso, ma non c'è nulla di certo, che venne collocata qui una delle copie della Madonnina del Duomo di Milano proprio per aggraziarsi la popolazione meneghina che saliva in valle*³⁷;

Mi hanno detto che l'hanno richiesta appositamente, adesso non ricordo chi l'ha voluta, ma l'hanno richiesta e l'hanno posizionata lì per omaggiare, da un lato i

*milanesi che stavano portando turismo e benessere alla valle con l'acquisto di case e con i campeggi, dall'altro, come logico, a protezione del villaggio e dell'intera valle.*³⁸

Il secondo è legato alla possibilità di “estendere” le qualità generalmente associate a Milano nell’immaginario comune – la vivacità, la ricchezza, l’innovazione – sull’immagine del comune montano destinata ai visitatori potenziali provenienti da altre aree italiane, e di conseguenza dipingere una rappresentazione del territorio per la quale la ruralità dialoga con lo spazio urbano, la tradizione con la vivacità creativa, la quiete della montagna con la disponibilità all’incontro.

Intorno ai luoghi raccontati da Cartabia si delinea quindi un’immagine nuova e socialmente costruita per mezzo della narrazione,³⁹ in virtù della quale la marginalità geografica – e turistica – della Valgrisenche è discorsivamente ricondotta a una circolazione più ampia di persone, capitale e cultura. Nel paragrafo seguente si osserverà più nel dettaglio come tale operazione di “ricollocazione” e di “rivivificazione” narrativa del luogo si compia in rapporto con le idee – apparentemente contrastanti – di pittoresco e di imprenditorialità turistica.

Tra il pittoresco e l’invito al turismo

S ECONDO LAURA Bonato,

*la volontà e l’impegno che la popolazione locale in molti casi mostra nella rivitalizzazione delle tradizioni o nella scelta di ‘ripartire’ grazie al turismo, evidenzia chiaramente come le comunità alpine siano vive e intenzionate a superare la marginalità che sempre ha caratterizzato la loro immagine.*⁴⁰

La comunità della Valgrisenche sembra rappresentativa di questo atteggiamento, secondo il quale la spinta verso il futuro passa inevitabilmente per la valorizzazione del ricco patrimonio non solo materiale, ma anche immateriale – costituito da conoscenze, leggende, antichi saperi agricoli e artigiani – di cui il territorio è dotato.

Le narrazioni di cui si dà conto nel presente saggio partecipano ai processi di valorizzazione patrimoniale secondo modalità coerenti con il modello del romanzo regionalista a vocazione turistica, a cominciare dalla precisione – e dalla ricchezza – toponomastica di cui fanno sfoggio. I nomi delle vie, delle piazze, delle borgate, nonché dei siti d’interesse architettonico e culturale (ad esempio le chiese, le fortificazioni, i vari edifici degni di nota) costellano infatti i romanzi,

e scandiscono le azioni dei personaggi con una tale esattezza da permettere al lettore “autoctono” di riconoscere senza margine d’errore i luoghi a lui cari, e al visitatore di altra provenienza di ripercorrere fedelmente i passi dei protagonisti, come seguendo una guida turistica o la mappa di una caccia al tesoro.

Tra le costruzioni più spesso menzionate vi è senz’altro la diga di Beaugard, che esercita sui personaggi una fascinazione fortissima, nella quale coesistono l’ammirazione per l’imponenza della struttura e l’inquietudine di una comunità che tempo prima ha dovuto abbandonare parte delle abitazioni per consentire la costruzione dell’invaso,⁴¹ e che ha ben impressa nella mente, come un presagio sinistro, la tragedia del Vajont del 1963. La presenza della diga è evocata a più riprese, talvolta rapidamente – magari per ricordare il rumore delle esplosioni controllate, chiamate “volate”, funzionali ad abbassarne l’altezza, che narrativamente scandiscono i tempi dell’azione come dei rintocchi d’orologio provenienti da un altrove misterioso – e talvolta in maniera più dettagliata: in *Valgrisenche: Nel silenzio del ricordo*, proprio in uno dei cunicoli intorno alla diga si verifica il fatto violento su cui si fonda tutto l’intrigo.

Non mancano però le rappresentazioni di altri luoghi cardine della cultura locale e meno immediatamente identificabili all’occhio del visitatore: ad esempio la grotta per la stagionatura delle fontine, un ambiente in cui con particolare pregnanza si osserva la convergenza tra l’economia locale, gli antichi saperi artigiani e la cultura tradizionale della regione. Anche in questo caso, la valorizzazione del luogo si compie attraverso un processo di ri-significazione narrativa: la grotta, meticolosamente descritta nei suoi aspetti fisici e nel suo valore comunitario, diventa il teatro di fatti sanguinosi⁴² o, al contrario, un riparo prezioso in cui proteggere dalla catastrofe imminente persone e oggetti.⁴³

Accanto alla grotta spiccano i siti deputati alla produzione e alla vendita del *drap*, il tessuto di lana che rappresenta un’eccellenza dell’artigianato valligiano, e i bar e ristoranti nei quali i personaggi consumano prodotti tipici in quantità, animati da una voce narrante che volentieri indulgia in digressioni culinarie chiaramente finalizzate a solleticare la curiosità dei turisti interessati alle ricchezze enogastronomiche della valle.

In tutti i testi presi in considerazione in questa sede, infine, abbondano i riferimenti alle leggende, alle tradizioni e alle festività che compongono il folklore locale, e rispetto alle quali tutti i personaggi – che siano adulti o bambini – esprimono il più grande entusiasmo: ne *Il mistero della madonnina di Valgrisenche*, ad esempio, i giovani protagonisti ricordano la Desarpa con concitazione (“Tutti gli anni andiamo a quella festa, è bello vedere i pastori rientrare a Valgrisa dopo mesi di solitudine su per i monti”⁴⁴), e in modo parimenti enfatico sono evocate la festa di San Grato, peraltro rappresentata come un’attività in cui i turisti sono felicemente

coinvolti (“Come sapete ogni anno facciamo una grande festa con una processione che coinvolge turisti e abitanti sino al lago San Grato”⁴⁵), e la competizione chiamata Tor des Géants, “che avrebbe fatto vivere Valgrisa giorno e notte”.⁴⁶

Considerata la finalità di valorizzazione territoriale alla quale i testi intendono assolvere, non stupisce la presenza capillare degli elementi summenzionati, né sorprende il fatto che essi siano talvolta inseriti nel tessuto narrativo tramite espedienti discorsivi riconducibili al modello testuale della guida turistica. Oltre alla già citata abbondanza toponomastica, si identificano all’interno della scrittura un certo numero di formule portatrici di un’assiologia positiva⁴⁷ assoluta e caratterizzate da un’aggettivazione tanto enfatica quanto vaga: “paradiso sperduto”, “luogo incantato”, “eccezionale unicità”, “straordinaria valle selvaggia” sono solo alcuni esempi, rappresentativi di una ben più diffusa tendenza a far coesistere modalità espressive tipiche di una pluralità di generi testuali.

Nella stessa prospettiva vanno interpretati quei passi in cui il dipanarsi dell’intrigo si interrompe bruscamente per lasciare spazio a veri e propri inserti dal valore pragmatico informativo, in cui si riportano contenuti di natura pratica destinati primariamente a un pubblico di persone che ancora non conoscono la valle, ma che potrebbero essere interessate a visitarla. Ancora una volta, la scelta di costruire romanzi intorno a personaggi “non autoctoni” si dimostra altamente funzionale al raggiungimento dell’obiettivo comunicativo, poiché l’alternanza tra le domande dei protagonisti – bisognosi di comprendere il contesto socio-culturale in cui si trovano – e le risposte fornite dagli abitanti del luogo funge da “ancoraggio” per l’interpolazione – spesso all’interno scambi riportati come discorsi diretti – di più o meno lunghi passi informativi, come in:

E poi fanno anche heliski. Ci sono un sacco di persone che vengono qui, prendono l’elicottero e poi affrontano in tutta sicurezza, con istruttori, le discese dai pendii. [...] Per esempio salgono sino alla Becca di Tos, o verso il Château Blanc, il Feluma o addirittura il ghiacciaio del Rutor e poi scendono con una neve fresca, fantastica. Pensa che abbiamo almeno un centinaio di percorsi di discesa differenti, senza dimenticare le piste da fondo che si sviluppano da Darbelley fino alla diga, costeggiano la Dora ed entrano nella bosaglia. O lo sci d’alpinismo o anche quello per i più piccoli, con lo snowpark... ne abbiamo qui di cose in inverno. Siamo piccolini ma amiamo che il turista si trovi bene, che abbia le cose più belle che la natura può offrire agli uomini senza intaccarla e rispettando a pieno la montagna.⁴⁸

Soprattutto, se pur non esclusivamente, in *Valgrisenche: Nel silenzio del ricordo*, l’ibridazione tra codici comunicativi diversi si realizza inoltre nella forma di veri e propri capitoli, per lo più scritti in forma di diario e redatti in corsivo per renderli agevolmente distinguibili, interamente dedicati alla trasmissione di conoscenze relative a fatti storici, elementi paesaggistici o architettonici, aspetti

del folklore e della cultura locale. In diversi casi, la sospensione della linea narrativa a profitto di una digressione turistico-culturale è esplicitamente annunciata mediante frasi con funzione meta-discorsiva, come in

È doveroso che io racconti, con questa parentesi, la storia della diga di Beauregard prima di procedere nella descrizione dei fatti di quell'estate per poi giungere ai giorni nostri, ed è anche giusto, seppur il lettore potrebbe annoiarsi, raccontare di quell'immensa struttura fatta non solo di cemento armato, ma anche di sacrifici, di pianti e di sorrisi per tutti gli abitanti della valle.⁴⁹

Se da un lato, in virtù delle scelte lessicali e comunicative finora menzionate, i testi appaiono attraversati da venature pittoresche tutt'altro che inconsuete nella narrativa di impianto territoriale,⁵⁰ dall'altro lato è interessante notare come la Valgrisenche rappresentata da Cartabia si discosti dal modello del pittoresco in senso stretto, inteso come l'“*invenzione del paesaggio senza gli abitanti*”.⁵¹ Ampio spazio è infatti dedicato agli operatori del territorio, spesso chiamati con il nome delle persone che ricoprono il ruolo nel mondo extradiegetico, tant'è che leggere i testi in ordine cronologico consente di acquisire una prima conoscenza essenziale delle vicissitudini amministrative e imprenditoriali del paese.

Nei romanzi compaiono i diversi sindaci che si sono succeduti e, accanto a loro, i gestori di rifugi, bar e ristoranti, i collaboratori della Pro Loco, i produttori di specialità gastronomiche o artigiane tipiche della zona. Tali personaggi si stagliano nei romanzi come individui complessi, con i loro caratteri, le loro passioni e idiosincrasie, i loro percorsi professionali e, non da ultimo, i loro interessi di tipo lavorativo ed economico, oltre che culturale e affettivo, in gran parte legati allo sviluppo turistico della valle:

Tutto era pronto per una stagione turistica senza pretese, ma che donava ossigeno a quella valle che nel tempo ne aveva sentiti di “scossoni” economici. Il turismo, le seconde case... i rifugi estivi... erano ciò che di più la sosteneva e la riportava a sollevarsi nelle lunghe serate invernali quando, anche a causa delle valanghe, poteva rimanere isolata per giorni⁵²

si legge ad esempio ne *La madonnina di Valgrisenche*. Da un punto di vista comunicativo, il risultato è la creazione e la promozione di un immaginario del luogo che, lungi dal trasmettere l'illusione fallace – benché commercialmente spendibile – di un angolo incontaminato “da conquistare”, nel quale sentirsi del tutto estranei alle dinamiche del turismo di massa,⁵³ trasmette al contrario l'impressione di una valle in cui i turisti troveranno altri viaggiatori come loro e, soprattutto, di una comunità ben motivata ad accoglierli con istintivo calore, ma anche con consapevole professionalità.

Conclusioni

IN UN saggio recente, gli studiosi Sheela Agarwal e Gareth Shaw affermano che la capacità degli autori di modificare la percezione delle collettività nei confronti degli spazi naturali e rurali “cannot be overstated”⁵⁴: sollecitando l’immaginazione e l’emozione, due fattori fondamentali nella declinazione esperienziale “post-turistica” del viaggio contemporaneo, la narrativa ha il potere di sovrapporre al luogo fisico “a favourable image”⁵⁵ e, di conseguenza, incentivare i flussi di visitatori.

Nel presente saggio si è voluto dare conto delle strategie comunicative prevalenti mediante le quali i romanzi firmati da Amos Cartabia contribuiscono alla “costruzione sociale”⁵⁶ di una destinazione turistica “marginale” relativamente al comune di Valgrisenche e all’area che lo circonda. L’analisi dei testi, considerati nel contesto mediatico di quella produzione thriller-poliziesca con finalità di comunicazione turistica che la critica rileva come una tendenza generalizzata su scala europea, ha consentito di mettere in luce le modalità secondo le quali essi tematizzano e ridiscutono la condizione di “marginalità” della Valgrisenche rispetto ai percorsi turistici più frequentati.

In particolare, si è osservato come la “favourable image” che i romanzi ambiscono a trasmettere si fondi su un effetto che potrebbe essere definito come di “riduzione discorsiva della marginalità”: una riduzione che si opera in primo luogo mettendo in luce le connessioni – passate, presenti e potenziali – del luogo con altre località, per lo più portatrici di un alto valore simbolico, nonché con dinamiche socio-culturali in atto su scala nazionale e internazionale; e in secondo luogo affiancando a una rappresentazione delle peculiarità paesaggistiche coerente con i codici della scrittura “territoriale” alcuni passi che rivelano gli interessi turistici della comunità di riferimento, soggiacenti alla scrittura stessa. □

Note

1. *Tourism Strategies and Rural Development*, Paris, Organisation for Economic Co-operation and Development, 1994, p. 7, [https://one.oecd.org/document/OCDE/GD\(94\)49/en/pdf](https://one.oecd.org/document/OCDE/GD(94)49/en/pdf).
2. “Reinventing whole regions of the national map as ‘Shakespeare country’, ‘Wordsworth’s Lake District’, ‘Scott-land’, ‘Brontë country’, ‘Dickens’s London’, ‘Hardy’s Wessex’ and so on.” Nicola J. Watson, *The Literary Tourist: Readers and Places in Romantic & Victorian Britain*, Houndmilles, Basingstoke – New York, Palgrave Macmillan, 2006, p. 5.

3. Per quanto riguarda il campo editoriale, si veda Olivier Bessard-Banquy, ed., *Splendeurs et misères de la littérature. Ou la démocratisation des lettres, de Balzac à Houellebecq*, Paris, Armand Colin, 2022.
4. Si veda Marco D'Eramo, *Il selfie del mondo: Indagine sull'età del turismo da Mark Twain al Covid-19*, Milano, Feltrinelli, 2022.
5. La definizione è discussa in David Herbert, *Literary Places, Tourism and the Heritage Experience*, «Annals of Tourism Research», vol. 28, nr. 2 (2001), p. 312 (pp. 312-333).
6. “Historically, tourism and literature have long enjoyed a close alignment and literary-inspired visits are associated with some of the earliest forms of travel and especially with the Grand Tour.” Nicola MacLeod, Jennifer Shelley e Alastair M. Morrison, *The Touring Reader: Understanding the Bibliophile's Experience of Literary Tourism*, «Tourism Management», vol. 67 (2018), p. 389 (pp. 388-398), <https://www.sciencedirect.com/science/article/abs/pii/S026151771830030X>. Si vedano, sull'argomento: James Buzard, *The Beaten Track: European Tourism, Literature, and the Ways to Culture, 1800-1918*, Oxford, Clarendon Press, 1993; Harald Hendrix, *From Early Modern to Romantic Literary Tourism: A Diachronical Perspective*, in *Literary Tourism and Nineteenth-Century Culture*, a cura di Nicola J. Watson, Houndmills, Basingstoke, Hampshire – New York, Palgrave Macmillan, 2009, pp. 13-24.
7. Si veda Marco D'Eramo, *Il selfie del mondo*.
8. Si veda Alexandre Gefen, *L'Idée de littérature: De l'art pour l'art aux écritures d'intervention*, Paris, Corti, 2021.
9. Cristina Trincherò, *La montagna nel romanzo francese e italiano: metamorfosi e corrispondenze di prospettive e immaginari tra ieri e oggi*, in “Open Tourism”: *Ricerche, prospettive e letture sul turismo culturale nell'area alpina occidentale*, a cura di Laura Bonato, Damiano Cortese, Enrico Lusso e Cristina Trincherò, Cherasco, Centro Internazionale di Studi sugli Insediamenti Medievali, 2020, p. 200 (pp. 199-223).
10. Si veda Alessandro Perissinotto, *Raccontare: Strategie e tecniche di storytelling*, Bari – Roma, Laterza, 2020, e in particolare il capitolo intitolato *Raccontare il territorio: da Detroit a Matera*.
11. Dalle iniziative di portata locale, spesso proposte gratuitamente alle comunità di lettori e lettrici, come il laboratorio di scrittura creativa *Raccontare il territorio* organizzato dall'associazione Pro Grigioni Italiano nel 2017 (<https://www.pgi.ch/it/eventi/laboratorio-di-scrittura-creativa-raccontare-il-territorio>) o il workshop *La città, il là fuori* tenutosi a Firenze nel contesto della rassegna Dialoghi Urbani 2023 (<https://cultura.comune.fi.it/dalle-redazioni/corso-di-scrittura-creativa-con-alessandro-raveggi-la-citta-il-la-fuori>), fino ai corsi lunghi e strutturati, idealmente professionalizzanti, incardinati in istituti privati come la Scuola Holden di Torino (<https://scuolaholden.it/>).
12. Menzioniamo ad esempio la visita “a due voci” di una mostra sulle rappresentazioni grafiche della montagna presso il Musée des Beaux-Arts di Chambéry, condotta da una guida turistica professionista e dalla scrittrice Céline Righi e realizzata a maggio 2023 in occasione del Festival du Premier Roman.
13. Relativamente al contesto italiano, si veda tra gli altri: Luca Crovi, *Storia del giallo italiano*, Venezia, Marsilio, 2020. Per una prospettiva più ampia, riferita ai paesi eu-

- ropei afferenti all'alleanza UNITA – Universitas Montium, rimandiamo al volume: *Le Polar dans la Cité: Littérature et Cinéma*, a cura di Christelle Colin, Émilie Guyard e Myriam Roche, Pau, Presses Universitaires de Pau et des Pays de l'Adour, 2022.
14. Basti pensare alle ambientazioni di campagna di Agatha Christie o alle avventure extra-parigine di Maigret: due esempi menzionati da Alice Jacquelin nel saggio *Enjeux politiques de l'espace romanesque dans le polar français des "petites villes"*: Nicolas Mathieu, Colin Niel, Antonin Varenne, in *Le Polar dans la Cité*, pp. 75-92.
 15. Si veda Alice Jacquelin, *Territorialisation du polar européen, entre représentation pittoresque et écriture des marges*, «Belphégor», nr. 20-1 (2022), <https://doi.org/10.4000/belphegor.4635>.
 16. Tra gli altri: Natacha Levet, *Le Roman noir français et les marges rurales: modalités, enjeux et évolutions*, «Belphégor», nr. 21-2 (2023), <https://journals.openedition.org/belphegor/5563>; Franca Pellegrini, *Variazioni sul 'giallo': la forma 'nazional-regionale' del romanzo italiano contemporaneo*, «Italian Studies», vol. 65, nr. 1 (2010), pp. 123-139, <https://www.tandfonline.com/doi/abs/10.1179/016146210X12593180018227>.
 17. La definizione “polar d'office du tourisme”, di chiara connotazione negativa, è di Aurélien Masson, ex direttore della collana “Série Noire” presso le edizioni Gallimard.
 18. È il caso, ad esempio, delle Edizioni del Capricorno di Torino, che da diversi anni collaborano con alcuni quotidiani di rilievo nazionale e locale per distribuire i loro romanzi, in allegato ai giornali, <https://www.edizionidelcapricorno.it/>.
 19. Amos Cartabia, *Valgrisenche: Nel silenzio del ricordo*, Lainate, A.Car., 2013, p. 380.
 20. Ricordiamo qui *Rifugio Bezzi: Il gioco della vita*, Lainate, A.Car., 2016, scritto insieme a Marco Turchetto, e *L'oro segreto dell'Épée*, Lainate, A.Car., 2023.
 21. Amos Cartabia, *Valgrisenche: Gli occhi della morte*, Lurago d'Erba, Edizioni il Ciliegio, 2014. A p. 345, si legge: “Valgrisenche è, non smetterò mai di segnalarlo, un paradiso di natura, semplicità e bellezza che solo andando a visitare questi luoghi si può apprezzare davvero fino in fondo. [...] Grazie di cuore a tutti i lettori, mi auguro che, anche grazie ai miei romanzi, possano scoprire le bellezze nascoste di questa nostra bella Italia!”
 22. Amos Cartabia, *Valgrisenche: L'ultimo paradiso segreto: Diario apocalittico per la nuova comunità – anno 2047*, Lainate, A.Car., 2020: “Grazie davvero e spero che i miei racconti possano in qualche modo aiutare la comunità di Valgrisenche portando non solo il turista amante della montagna, ma anche il lettore attento che, magari, vuol conoscere il vostro [degli abitanti della Valle] prezioso gioiello. A tutti quelli che conosco... vi aspetto in Valgrisenche” (p. 267).
 23. Amos Cartabia, *Il mistero della madonnina di Valgrisenche: La banda dei 4*, Lainate, A.Car., 2019. Rispetto ai volumi summenzionati, questo è provvisto di un apparato paratestuale più snello. Nella quarta di copertina si legge tuttavia: “Un libro per ragazzi, per adulti e per chi, attraverso un racconto, vuole scoprire le bellezze del nostro Paese!”
 24. David Herbert, *Literary Places, Tourism and the Heritage Experience*, pp. 314-315.
 25. Cfr. Maxine Feifer, *Going Places: The Ways of the Tourist from Imperial Rome to the Present Day*, London, Macmillan, 1985; Jean Viard, *Eloge de la mobilité: Essai sur le capital temps libre et la valeur travail*, Avignon, Éditions de l'Aube, 2006; Philippe Bourdeau, *Le Tourisme réinventé par ses périphéries?*, in *Explorando las Nuevas Fronte-*

- ras del Turismo: Perspectivas de la investigación en turismo*, a cura di Fabien Bourlon, Mauricio Osorio, Pascal Mao e Trace Gale, Coyhaique, Ñire Negro, 2012, pp. 27-44; Alain Girard, *Faut-il raccorder une théorie générale de la post-modernité à une théorie à moyenne portée du post-tourisme?*, in *Fin (?) et confins du tourisme: Interroger le statut et les pratiques de la récréation contemporaine*, a cura di François Hugues, Philippe Bourdeau e Liliane Perrin-Bensahel, Paris, L'Harmattan, 2013, pp. 43-52.
26. Come ricorda Philippe Bourdeau, il “post-turismo” può essere considerato come la postura tipica della post-modernità, basata su una prospettiva “obliqua” che riconosce e apprezza l'inautenticità e l'artificio, spesso considerati con ironia. In quest'ottica nuova, accanto ai tradizionali fattori di attrazione di tipo paesaggistico o patrimoniale, si delinea un gusto particolare per il turismo esperienziale, legato all'emotività e alle sensazioni. Philippe Bourdeau, *L'après-tourisme revisité*, «Via: Tourism Review», nr. 13 (2018), <https://journals.openedition.org/viatourism/1936>.
 27. David Herbert, *Literary Places, Tourism and The Heritage Experience*, p. 312.
 28. Cristina Trincherò, *La montagna nel romanzo francese e italiano*, p. 202.
 29. La definizione è di Amos Cartabia.
 30. Per precisazioni sulla nomenclatura specifica dei diversi sotto generi del poliziesco territoriale, rimandiamo a Jean Tulard, *Dictionnaire du roman policier*, Paris, Fayard, 2005, nonché alla sezione *Le polar régionaliste* del testo di Estelle Riquois, *Rouen en noir et blanc*, in *Villes dans le Noir*, Montpellier, IREC, 2007, <https://hal.science/hal-03137691>.
 31. Menzioniamo in particolare Amos Cartabia, *Notte di paura al Castello di Sorci*, Lainate, A.Car., 2015, e *L'ultimo custode delle leggende del Castello di Sorci*, Lainate, A.Car., 2017. Per una rassegna delle attività svolte nel Castello e sul territorio, rimandiamo alle relative voci sul blog dell'autore: <http://amoscartabia.blogspot.com/>.
 32. Stefano Ardito, *Valgrisenche: 3 sentieri nella Valle d'Aosta sconosciuta*, «Montagna. TV», 2 luglio 2023, <https://www.montagna.tv/223229/valgrisenche-3-sentieri-nella-valle-daosta-sconosciuta/>.
 33. Andrea Greci e Federico Rossetti, *Rutor-Sassière: Valgrisenche, Valle di La Thuile, Valdigne*, Villa di Teolo, Idea Montagna, 2023, <https://vienormalivalledaosta.it/le-guide-della-valle-daosta/rutor-sassiere-valgrisenche-la-thuille-valdigne/>.
 34. Si veda ad esempio la video-intervista ad Amos Cartabia realizzata da Gian Battista Cassulo e pubblicata online: <https://www.inchiostrofresco.it/wp/2022/08/21/incontro-con-lautore-in-valgrisenche/>.
 35. Amos Cartabia, *Valgrisenche: L'ultimo paradiso segreto*, p. 99.
 36. Amos Cartabia, *Il mistero della madonnina di Valgrisenche*, p. 7.
 37. Amos Cartabia, *Il mistero della madonnina di Valgrisenche*, p. 34.
 38. Amos Cartabia, *Il mistero della madonnina di Valgrisenche*, p. 11.
 39. Rimandiamo al sopracitato saggio di David Herbert, *Literary Places, Tourism and the Heritage Experience*, pp. 314-315.
 40. Laura Bonato, *Turismo nelle terre alte: comunità, politiche culturali e strategie sostenibili*, in *“Open Tourism”: Ricerche, prospettive e letture sul turismo culturale nell'area alpina occidentale*, p. 130 (pp. 125-138).
 41. Diverse borgate furono abbandonate negli anni Cinquanta, e alcune di esse furono interamente sommerse dall'acqua del bacino idrico: i loro resti riaffiorano oggi in

parte, come conseguenza della riduzione della capienza della diga per ragioni di sicurezza.

42. Soprattutto in *Valgrisenche: Gli occhi della morte*.
43. Amos Cartabia, *Valgrisenche: L'ultimo paradiso segreto*.
44. Amos Cartabia, *Il mistero della madonnina di Valgrisenche*, p. 14.
45. Amos Cartabia, *Il mistero della madonnina di Valgrisenche*, p. 33.
46. Amos Cartabia, *Il mistero della madonnina di Valgrisenche*, p. 41.
47. Cfr. Dominique Maingueneau, *Analyser les textes de communication*, 2° edizione, Paris, Armand Colin, 2007.
48. Amos Cartabia, *Valgrisenche: Gli occhi della morte*, pp. 286-287.
49. Amos Cartabia, *Valgrisenche: Nel silenzio del ricordo*, p. 203.
50. Cfr. Alice Jacquelin, *Territorialisation du polar européen*.
51. “Le pittoresque est né comme *invention du paysage sans paysans*.” Jean-Didier Urbain, *Paradis verts: Désirs de campagne et passions résidentielles*, Paris, Payot & Rivages, 2008, p. 124.
52. Amos Cartabia, *Il mistero della madonnina di Valgrisenche*, p. 64.
53. Come osserva Jean-Didier Urbain, la figura del turista è segnata da una sorta di stigma sociale paradossale, di cui l'industria dei viaggi non manca di appropriarsi a suo vantaggio: ecco allora che, per attirare turisti in un luogo, un modo efficace sembra essere pubblicizzarlo come perfettamente “vergine”, o al più “di nicchia”, in ogni caso essenzialmente “anti-turistico”: “cette industrie est prête à toutes les ruses – à commencer par l'exploitation du mépris paradoxal: le discours de promotion touristique doit être antitouristique». Jean-Didier Urbain, *L'Idiot du voyage: Histoires de touristes*, Paris, Plon, 1991, p. 125.
54. Sheela Agarwal e Gareth Shaw, *Heritage, Screen and Literary Tourism*, Bristol – Blue Ridge Summit, Channel View Publications, 2018, p. 9.
55. Sheela Agarwal e Gareth Shaw, *Heritage, Screen and Literary Tourism*, p. 9.
56. David Herbert, *Literary Places, Tourism and the Heritage Experience*, p. 312.

Abstract

Narrative Perspectives for Valgrisenche:
Territorial Writing As a Key to Redefining Tourism Marginality

The essay examines how the notion of “marginality” is discussed within a corpus of narrative texts focusing on the territory of Valgrisenche, in the Aosta Valley (Italy). After reconstructing the cultural and media context of “territorial writings,” we show how the novels reflect the ambitions of a community intending to carve out a more prominent space within tourist circuits. In particular, we look at how the notion of “marginality” is questioned by two factors: the highlighting of the multiple relationships between Valgrisenche and the national and international context; and a representation of the territory in which picturesque tones coexist with the explicit assertion of the region's tourist interests.

Keywords

sustainable tourism, literary tourism, storytelling, narratives, Aosta Valley

La Bassa Langa e l'uscita dalla marginalità Creazione di un paesaggio divino e di vino, tra turismo enogastronomico e autenticità

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“Da molto tempo mi chiedevo che cosa potevo far io per le Langhe, per farle conoscere, per dare vita ad aspetti e possibilità rimaste in ombra.”

(Luciano Degiacomi)

CON IL termine Langhe si identifica un territorio della regione Piemonte che si estende nell'area lungo le province di Cuneo e di Asti, divisibile in paesi a bassa quota, conosciuti come Bassa Langa, e ad alta quota, che si collocano nell'area dell'Alta Langa, e un'ulteriore fascia più vicina ad Asti denominata appunto Langhe Astigiane. Dal 2014 le Langhe, insieme a Roero e Monferrato, sono state ufficialmente incluse nella lista dei beni del Patrimonio dell'Umanità. Il nome di queste meravigliose colline deriva dal dialetto piemontese per il quale *langhe* significa lingua e rimanda alle forme sinuose del territorio.

Le Langhe sono ricche di storia, arte e cultura; celebri sono i vini come il Barolo, il Barbaresco, il Dolcetto e la Barbera d'Alba, che nel corso degli anni hanno permesso di raccontare il paesaggio e la cultura locale in modo “di-vino”. Anche nel settore gastronomico si trovano prodotti di nicchia come il Tartufo Bianco d'Alba, la fa-

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mosa nocciola Tonda Gentile e le Robiole di Roccaverano e Murazzano (www.slowdays.it). Osservando il territorio nella sua geografia più manifesta, la Bassa Langa si presenta così: file precise e squadrate geometricamente, una tecnica certosina sicuramente tramandata da generazioni, tratto della coltivazione e della lavorazione dei vigneti volti ad onorare il dio Bacco. La bellezza e l'originalità di questi paesaggi agricoli patrimonio UNESCO derivano precisamente proprio da questa tipologia paesaggistica, regolarmente ripetuta da una collina all'altra (Devecchi 2019).

La Bassa Langa, in altre parole, è un paesaggio agrario che rappresenta il risultato di profonde attività produttive, ma soprattutto è l'espressione di "cultura nel campo agricolo" ispirata da una saggia gestione del territorio che è stata in grado di preservarlo in passato da gravi minacce alla sua stabilità. Gli interventi antropici nel tempo hanno ridefinito il profilo del paesaggio assecondandone la natura e la predisposizione colturale secondo giacitura ed esposizione. Gli insediamenti abitativi e la conduzione arcaica delle attività produttive del territorio, cappelle votive, piloni, seccatoi o forni, sono le radici dalle quali si sono sviluppate le moderne imprese agricole di produzione, trasformazione e vendita dei prodotti tipici (Cerrina 2021). La Bassa Langa è ricca di elementi naturali come boschi, tartufaie, calanchi e fondivalle: alcuni di questi ancora oggi costituiscono la matrice incontaminata del territorio e come tale devono essere preservati sia per il loro intrinseco valore naturalistico sia per il ruolo di paradigma che rivestono in un contesto di sviluppo territoriale armonioso. È questa la sommaria descrizione di un luogo unico nel suo genere. La Bassa Langa rappresenta il luogo collinare liberatosi dell'etichetta di area marginale grazie all'uomo che ha reso il territorio commerciale, commerciabile e accattivante agli occhi dei visitatori e degli imprenditori più astuti. Qui, in Bassa Langa, il concetto di antropocene¹ (Lai 2020) e la mano prepotente dell'uomo sull'ambiente naturale è percepibile in ogni angolo del paesaggio; in quest'area, in passato considerata marginale e interna, l'antropocene ha realizzato il massimo del suo significato in vari settori: dall'agricoltura alla gestione delle tartufaie alle politiche sulle aree boschive modificando il panorama che è diventato ambiente turistico extra lusso.

È uno scenario così caratteristico da non essere indifferente neanche a chi si occupa di letteratura, come si evince da un saggio di Veronica Pesce (2010), dedicato a Beppe Fenoglio², in cui si delinea la connessione tra il paesaggio e l'autore:

un aspetto per la verità trascurato o poco approfondito dagli studiosi, nonostante la sfida sia stata raccolta da parecchi interpreti. Il lettore ritrova e riconosce subito la città di Alba, dove l'autore nacque e visse la sua breve vita tra bassa e alta Langa. (Pesce 2010, 117-118)

Le Langhe, quindi, come dipinto e immagine definita nella sua geometria nelle parole di Fenoglio: nei romanzi fenogliani, infatti, questo paesaggio accompagna i ricordi dei protagonisti, è parte attiva del sistema narrativo in cui si articolano gli schemi del racconto (Pesce 2011).

Ma come è noto, e come accennato nella prima parte dell'elaborato, di Langhe ce ne sono due: l'Alta, definita anche *altra* (Cerrina 2021), dove l'aria piemontese si mischia ai venti del mare, dove per assaporarne il paesaggio è necessario fare su e giù dai *bricchi* (nome che gli abitanti dell'Alta Langa danno alle colline) (Carbone 2024); e la Bassa, meta preferita dagli *chef* stellati per raggiungere il successo grazie al panorama che incornicia le *location*.

L'Alta Langa è nettamente diversa dalla Bassa, a partire dalla struttura geografica, che appare più montuosa e selvatica; la Bassa, come accennato precedentemente, risulta più antropomorfizzata, più contaminata e assolutamente impregnata di turismo e novità, sembra aver dimenticato di quando era terra marginale.

L'Alta Langa è quell'area meridionale del Piemonte in provincia di Cuneo delimitata dalle dorsali che si estendono tra le valli dei torrenti Belbo e Uzzone e il fiume di Millesimo e di Spigno, vicino troppo vicino alla Bassa Langa dei vini, alla Langa astigiana, alla Langa cebana e ai confini con la Liguria (Cerrina 2021). Definita area interna perché lontana da agglomerati urbani, distanti da autostrade e da grandi manifestazioni che sponsorizzano il Barolo³ (Cerrina 2021), comprende 38 comuni.

La presenza di un'Alta e di una Bassa Langa è un dato di fatto, una caratteristica geografica visibile ad occhio nudo: basti pensare, come sottolinea Cerrina (2021), che percorrendo la strada che da Niella Belbo arriva a Feisoglio (Alta Langa), ci si imbatte in una struttura abbandonata e degradata che ricorda qualcosa che ci doveva essere e non c'è. Qualcosa che stava per iniziare e improvvisamente si è fermato, a dimostrazione di un fenomeno definito spopolamento che ha reso l'Alta Langa non solo area interna ma anche marginale. Come affermano alcuni studiosi (Bonato 2017; Viazzo 2017; Farinelli 2003), la definizione di "area marginale" non è data esclusivamente dalle caratteristiche impervie del territorio ma dal processo di spopolamento subito negli anni.

L'Alta Langa è terra marginale ma anche originale (Bonato 2017): riportare e accostare questi due aggettivi permette di entrare in reale connessione con un mondo abbandonato ma che conserva originalità e autenticità, aspetti tipici dei territori di bassa montagna definiti spesso marginali.

A dimostrazione di ciò, è necessario menzionare un progetto attivo tra il 2013 e il 2014 dal titolo *Da terra marginale a terra originale*, il cui obiettivo era preservare il paesaggio e la struttura delle Langhe (Cerrina 2021). Era un'iniziativa per il recupero delle terre abbandonate il cui *focus* era disegnare un futuro dell'agricoltura in Langhe adattandosi alle esigenze di sviluppo, volte alla sal-

vanguardia dell'identità culturale e del paesaggio (Balocco 2019); presentazioni e traguardi del progetto furono esposti in due convegni nel 2013 e nel 2014 a Clavesana.

Durante un'intervista, che è stata *input* principale per dar vita a questo testo, Mauro Carbone⁴, il quale ha una stretta relazione con le Langhe – queste colline, infatti, accompagnano la sua vita privata e plasmano quella professionale da sempre –, descrive come segue l'Alta Langa:

è stata abbandonata dagli agricoltori quando negli anni '60 la FIAT prometteva loro di avere tapparelle di plastica negli appartamenti della periferia di Torino e, perché no?, anche la moquette. L'Alta Langa è quel luogo in cui è tutto vero.

Si consideri che

tra gli anni cinquanta e sessanta si assiste a un rapido e costante processo di decadimento delle condizioni economiche, sociali e culturali delle campagne. Il modello vincente era quello delle città che si impose su tutto il territorio nazionale. (Grimaldi 1996, 13)

L'industrializzazione ha spopolato l'Alta Langa: questo fenomeno ha fatto sì che in queste aree interne si abbandonassero tradizioni e coltivazione arcaiche, generando così l'immobilità del paesaggio, visibile oggi dall'incolto dei terreni, che sul mercato hanno un valore nettamente inferiore rispetto alle aree del Barolo in Bassa Langa (50.000 euro anziché 1.500.000 come nell'area di Alba). Si è definito un panorama che ha subito l'industrializzazione, non aggiungendo simboli di modernità ma, al contrario, togliendo, sradicando persone e saperi da quella terra troppo interna. Lo spopolamento ha svuotato i *bricchi* e l'ombra della modernità rappresenta il fantasma di una cultura che merita di tornare a vivere. Ma se si parla di aree marginali, e individuando tra queste l'Alta Langa, quali caratteristiche hanno e come possiamo definirle?

Nel 2010 la Regione Piemonte identificava come “aree marginali” quei territori che

presentano uno sviluppo economico-sociale non equiparabile al contesto territoriale che li circonda. Tale situazione deriva principalmente dalle peculiarità intrinseche del territorio marginale, quali condizioni morfologiche (pendii, dislivelli, inaccessibilità ecc.) che comportano carenze strutturali nelle reti di trasporto e di comunicazione, sfavorendo l'insediamento e lo sviluppo di attività produttive e la mobilità delle persone. (Regione Piemonte 2010, 4)

In questo documento l'espressione "aree interne" è utilizzata per indicare

quella parte del Paese [...] distante da centri di agglomerazione e di servizio e con traiettorie di sviluppo instabili ma al tempo stesso dotata di risorse che mancano alle aree centrali, "rugosa", con problemi demografici ma al tempo stesso fortemente policentrica e con elevato potenziale di attrazione. (Barca 2012, 12)

Nel caso specifico dell'area Langhe-Roero, nel 2013 è stato stilato il Manuale per il recupero, la tutela e la salvaguardia del patrimonio naturale e degli elementi tipici del territorio, un documento realizzato dal GAL Langhe Roero Leader che ha l'obiettivo di definire le qualità, gli elementi di tipicità e di valore paesaggistico, nonché le caratteristiche del patrimonio naturale locale al fine di individuare gli aspetti da salvaguardare e valorizzare, anche nell'ottica del recupero del paesaggio.

LO STUDIO si riferisce ad un territorio che comprende circa 70 comuni, la cui conformazione ambientale è estremamente eterogenea, dalle Rocche del Roero alle colline della Bassa Langa, fino alle alture dell'Alta Langa; tale ricchezza è altresì riscontrabile per la varietà di colture e di culture presenti: patrimonio enogastronomico, storico-architettonico, letterario. La tradizione agricola di Langhe e Roero ha fatto sì che queste due aree del Piemonte siano tra le più conosciute, a livello sia nazionale sia internazionale.

Analizzando l'uscita della Bassa Langa da area marginale, si evince che lo spostamento dell'equilibrio agro-eco-sistemico verso un'antropizzazione o una naturalizzazione eccessiva del territorio porta con sé una diminuzione della biodiversità. L'aumento dei rischi connesso a specifiche forme di inquinamento che entrano a fare parte della vita quotidiana – smog, rumore, inquinamento degli acquiferi ecc. – ha indotto a riflettere su una partecipazione più consapevole alla salvaguardia dell'ambiente (Assuma, Bottero, Cassatella e Cotella 2022). Dal punto di vista culturale è stato fondamentale sensibilizzare la popolazione locale a preservare paesaggi e conoscenze, anche con il contributo del Museo del paesaggio di Langhe e Roero, con sede nel castello di Magliano Alfieri. Il progetto si ispira alla Convenzione Europea del paesaggio (2000) e alla Legge Regionale 16 giugno 2008, n. 14, "Norme per la valorizzazione del paesaggio" (GAL 2013).

Altro aspetto che ad oggi risulta fondamentale per narrare il territorio delle Langhe è il connubio tra vino e prodotti locali. Sicuramente la fama maggiore e la meta preferita dai *tourist oriented* è la Bassa Langa, con viticoltura di alta qualità e altre produzioni agricole di grande interesse, i tartufi, e i cosiddetti "pro-

dotti di nicchia”, il cui valore va esaltato e salvaguardato in quanto testimonianza della biodiversità agronomica del territorio (Cavallo 2004). Si può quindi dedurre che punto di forza di queste colline è senza dubbio l’enogastronomia, fattore sul quale già nel 1967 “L’ordine dei Cavalieri del Tartufo e dei Vini di Alba”⁵ ha fondato il suo Statuto e divulgato in maniera costante e determinata tale patrimonio, come si legge nella pagina ufficiale della confraternita che riporta le parole del fondatore Degiacomi: “da molto tempo mi chiedevo che cosa potevo far io per le Langhe, per farle conoscere, per dare vita ad aspetti e possibilità rimaste in ombra” (De Giacomi 2007, 4). Motivati e guidati da Luciano Degiacomi, i 21 soci fondatori si diedero uno Statuto in cui si definisce come scopo centrale dell’Ordine conservare, tutelare o fare rinascere usi, costumi e tradizioni popolari locali, qualificare l’enogastronomia del territorio, fare attiva propaganda in favore della gastronomia e dei vini tipici dell’Albese sia in Italia sia all’estero. I membri dell’Ordine erano Albesi o comunque Langhetti. Come si legge nel testo, *Per Luciano Degiacomi* (2015), l’Ordine dei Cavalieri ha contribuito in maniera proficua e attiva a diffondere il patrimonio enogastronomico della Bassa Langa divulgandolo in tutto il mondo: oggi si contano infatti più di 100 delegazioni straniere. Tra le iniziative più importanti emerge sicuramente quella curata in prima persona da Degiacomi – durante tutta la sua vita come Gran Maestro della confraternita –, che mirava alla raccolta di 150 Capitoli in cui sono presenti ricette antiche delle Langhe. Queste eccezionali prelibatezze gastronomiche hanno permesso di avvicinare all’Ordine, oltre che numerosi ospiti stranieri, anche personalità illustri del panorama giornalistico italiano e accademici della storia dell’agricoltura e della viticoltura. In seguito, tra il 1986 e il 1993, Luciano Degiacomi, in collaborazione con il latinista professor Mariano Corino, curò la ristampa del *De naturali vinorum historia*, esto del 1596 di Andrea Bacci⁶, composto da 7 volumi: i primi raccontano del vino nell’antichità, dal terzo al sesto leggiamo delle riflessioni sulla conservazione del mosto, sulle proprietà di questo e sull’aceto, nell’ultimo volume si accenna all’effetto che il vino può avere sul carattere e sul comportamento se assunto in dosi eccessive.

La Bassa Langa è uscita e si è liberata dell’etichetta di area marginale, sostiene Carbone durante il nostro colloquio, e a tale affermazione, segue incalzante, la mia più ovvia domanda su “come e perché?” e a questa arriva una risposta “a fume”... ma di vino.

Intendo ora rileggere la storia del vino delle Langhe partendo da una tragedia che ha cambiato il destino del territorio. Mauro Carbone, alla domanda su “come e perché” l’Alta Langa si è liberata dell’aggettivo marginale, mi risponde con una parola: metanolo.⁷

Era l’anno 1986, sul tavolo una bottiglia di Barbera del Piemonte: così morì Armando Bisogni, avvelenato dal di vino (www.thevision.it). Ma la lista dei

morti per intossicazione da metanolo continuò ad aumentare e dopo qualche mese si cercò di risalire alla partita di vino incriminata, concentrandosi nella zona tra Asti, Alba e nel territorio delle Langhe.

La vicenda delle morti da vino si concluse con le indagini che si focalizzarono a Narzole, dove il Tanaro aveva assunto un colore rossastro dato dal vino che era stato sversato lì, ma tutti sapevano che in quella zona non vi erano vigneti. Il mondo viticolo implose e le vendite precipitarono del 45%. Quello che per anni era stato garanzia e segno di identità, alleato fedele del territorio, si era trasformato nel peggior nemico dell'area Langhe-Roero. Al crollo degli introiti dati dai vitigni delle Langhe seguì quella che diventò la cattiva reputazione del prodotto, nessuno più comprava vino proveniente da quella zona: il mercato si arrestò. Bisognava risollevarlo il nome e la qualità del vino delle Langhe, e se da una parte arrivarono gli aiuti del governo Craxi, che stanziò 5 miliardi di lire per una campagna straordinaria di informazione alimentare, dall'altra i produttori e i coltivatori si misero all'opera per tornare sul mercato.

Per raccontare dell'impresa titanica compiuta da ristoratori, produttori e da tutta la popolazione langhese, per ridare credibilità al vino e al territorio, Mauro Carbone afferma:

alcuni produttori iniziano ad andare in Germania e Svizzera, portando con sé bottiglie di vino di ottima qualità, andavano porta a porta per i ristoranti, facevano assaggiare il prodotto di qualità facendo dimenticare la questione metanolo, narravano il prodotto e invitavano i ristoratori svizzeri e tedeschi a venire nelle Langhe, per dimostrare loro che il vino era di qualità.

Erano gli anni in cui si muoveva un flusso di ristoratori stranieri che visitava il territorio delle Langhe, soggiornava nelle aree del Barolo e Alba, approfondiva la conoscenza del vino e rimaneva incantato dall'autenticità dei prodotti locali. “Non è più questione solo di vino”, mi confessa Mauro, diventava una promozione che inglobava il Tartufo Bianco d'Alba, la pasta fatta in casa, le nocciole e il panorama.

Collegare un prodotto a un territorio è una risposta alle attuali tendenze dei consumatori, che vedono una combinazione di paesaggio, cultura e ricchezza di cibo e vino (Larcher, Gullino, Devecchi e Reyneri 2008). In questa prospettiva, anticipata dai Cavalieri, in cui prodotti e territori viaggiano di pari passo, è necessario che il paesaggio sia attraente, armonioso e ordinato ma allo stesso tempo autentico: quale paesaggio se non quello della Bassa Langa rappresenta al meglio questo connubio? Quotidianamente gli enti della Bassa Langa studiano e applicano strategie al fine di promuovere i prodotti locali e le immagini culturali: ne sono un esempio gli itinerari enogastronomici, come le “Strade del Vino

e dei Sapori”, a voler dimostrare il successo degli sforzi per aumentare la consapevolezza dei consumatori sui prodotti di qualità, valorizzando così la produzione agricola regionale. La “Strada del Vino delle Langhe” spicca in particolare nell’ambito dell’UNESCO: affrontando un lungo periodo di tempo e con molte iniziative a supporto delle pratiche territoriali, ha creato una innovativa “cultura del vino”, promuovendo la conoscenza della storia delle varie fattorie presenti lungo percorsi predefiniti (Devecchi 2019). Questi percorsi sono progettati per ottimizzare l’usabilità delle zone viticole, dove persistono importanti valori naturali e culturali, come vigneti e cantine singole associate a fattorie pubbliche in un ambiente di prestigioso paesaggio, storico e artistico.

Altro esempio è dato dalla nota Fiera Internazionale del Tartufo Bianco d’Alba, evento che dal 1929 rappresenta un palcoscenico unico per la promozione del patrimonio immateriale UNESCO in relazione al fungo. “La fiera, oggi si direbbe è un contenitore vario, ma la sua essenza e sostanza è sempre fondamentale uguale nel tempo” (Cirio 2012, 16). Leggendo un testo del 2012 dal titolo *Tartufo: Fiera internazionale del Bianco d’Alba: Racconti dietro le quinte* si comprende come l’area di Alba e le zone limitrofe “sul re tartufo bianco” abbiano costruito un *brand* che crea molte opportunità lavorative, e che grazie alla fiera le tradizioni vivono ogni anno l’esperienza di mostrarsi a visitatori provenienti da tutto il mondo. La fiera del tartufo bianco d’Alba è un *mix* di manifestazione popolare, mostre d’arte, rassegne varie.

Approfondendo la percezione dello spazio, e in questo caso della Bassa Langa, questo è un aspetto complesso dell’esperienza umana e non è unicamente riducibile al senso della vista. Il paesaggio è percepito come un “bene”, un insieme di odori, sapori e saperi che rappresentano un dono e, nel caso dell’area del Barolo e di Alba, sfruttato al massimo per avere un tornaconto turistico di risonanza mondiale.

Un paesaggio vitivinicolo di qualità deve esprimere chiaramente le caratteristiche della ruralità. La cultura del vino si è gradualmente consolidata come il principale *asset* socio-economico della regione: da un lato questo ha contribuito a rafforzare il senso di appartenenza e l’identità territoriale delle comunità locali; dall’altro ha stimolato nei principali attori e *stakeholder* prospettive innovative in termini di produzione, comunicazione e *branding* (Devecchi e Cerrato 2005).

Nel corso degli anni le opportunità emergenti e gli investimenti per la valorizzazione della cultura e dei prodotti locali hanno aumentato la visibilità e la competitività nazionale e internazionale dell’area, creando così nuove figure professionali attivamente coinvolte nel processo produttivo.

In ogni caso, il valore ambientale e paesaggistico delle regioni vinicole è riconosciuto da molte entità, comprese varie organizzazioni internazionali che mirano alla loro gestione e conservazione. Come prova di questo riconoscimento

crescente, la Lista del Patrimonio Mondiale dell'UNESCO (WHL) include diverse aree di paesaggio culturale caratterizzate dalla presenza di zone vitivinicole, molte delle quali si trovano in Europa: la regione vinicola dell'Alto Douro in Portogallo (2001), la regione di Tokaj in Ungheria (2002), l'area delle Langhe-Roero e del Monferrato in Italia (2014), la regione di Champagne, Caves et Coteaux de Champagne in Francia (2015) ecc.

Secondo l'UNESCO le regioni vinicole, di cui il Piemonte e nel caso specifico l'area Langhe fa parte, sono il risultato del processo di produzione del vino come una relazione tra l'uomo e l'ambiente ("paesaggi continui", nelle parole dell'UNESCO): di conseguenza hanno sviluppato un'offerta turistica che, attingendo a molteplici forme di attrazioni, dal cibo al vino dal benessere ad attività sportive per arrivare agli eventi culturali, è riuscita progressivamente ad attirare flussi turistici non stagionali (Bruwer e Rueger-Muck 2019).

Ed è proprio sul fattore turismo che si concentra una buona parte della mia intervista con Mauro Carbone:

il turismo in Bassa Langa è qualcosa che ha permesso l'apertura di 20 ristoranti con chef stellati, ha dato il lascia passare per la vendita di strutture a prezzi fuori dal mercato, esorbitanti è un eufemismo, che genera l'overbooking nei periodi di Fiera del Tartufo pregiato Bianco d'Alba.

Inevitabilmente questi flussi turistici si trascinano una serie di problematiche dettate anche dal principio primo per cui quella delle Langhe è area interna, ancora oggi, dal punto di vista dei *transfer* e dei collegamenti che restano un punto critico per i turisti e chi deve raggiungere le zone.

PER CONCLUDERE, se da una parte questi flussi turistici, in aumento, costituiscono senza dubbio un'importante colonna economica per l'area, aprono anche una serie di sfide che devono essere affrontate con attenzione al fine di preservare la qualità culturale, ambientale e paesaggistica locale, puntando, come sottolinea Carbone durante l'intervista, ad applicare un modello di espansione sull'Alta-altra Langa che si discosti in modo netto dalle aree del Barolo: un turismo non per imitazione ma per autenticità. Il turismo dell'Alta Langa dovrebbe rispecchiare l'effetto sorpresa, quello che si ha quando si entra in un'osteria di Bossolasco o Murazzano e dalla cucina escono piatti della tradizione estranei alle nuove tecnologie della cucina *gourmet*. Non è difficile immaginare che qui, in Alta Langa, dove l'incolto e il selvaggio prevalgono, l'uomo arrivi per applicare modelli turistici dei vicini considerati vincenti.



Note

1. Il concetto di antropocene in antropologia è rappresentato dalle dinamiche messe in moto dall'uomo che generano mutamenti sociali e ambientali. L'uomo è quindi il principale attore dei cambiamenti che incidono sul pianeta (Lai 2020).
2. Giuseppe Fenoglio, detto Beppe (Alba, 1 marzo 1922-Torino, 18 febbraio 1963) è stato un partigiano, scrittore e traduttore italiano. Le sue opere presentano due direttrici principali: il mondo rurale delle Langhe e il movimento di resistenza italiana, entrambi ampiamente ispirati dalle proprie esperienze personali; allo stesso modo, Fenoglio si esprime in due stili: la cronaca e l'epos.
3. Il Barolo è stato definito negli ultimi anni "il re dei vini, il vino del re". Rappresenta il cuore pulsante dell'area vitivinicola delle Langhe. Barolo è anche il nome di un comune nella cui area si trova il maggior numero di vigneti di Nebbiolo, unica tipologia utilizzabile al 100% per la produzione del Barolo (www.stradadelbarolo.it).
4. Mauro Carbone nasce nelle Langhe e cresce impregnato di questa cultura, tra racconti di tradizioni rurali e pasta fresca. Dopo l'Università, dove approfondisce studi di *marketing* e turismo, inizia ad occuparsi di *business* sostenibile. Diventa direttore dell'Ente Turismo di Alba Bra Langhe e Roero, allargandone i confini e creando l'ATL Langhe Monferrato Roero. Da sempre è impegnato nella promozione delle tipicità enogastronomiche nelle aree UNESCO. Attualmente dirige il Centro Nazionale Studi Tartufo.
5. L'Ordine dei Cavalieri del Tartufo e dei Vini di Alba nasceva il 22 febbraio 1967 in una piccola trattoria di Grinzane Cavour come una Confraternita Enogastronomica, il cui obiettivo era preservare le tradizioni e le usanze enogastronomiche del territorio, con particolare attenzione ai vini e al re tartufo.
6. Andrea Bacci, medico, filosofo, studioso e scrittore, nacque nel 1524 a Sant'Elpidio a Mare d'Ancona, nel Piceno, oggi nella provincia di Ascoli. Iniziò la professione di medico a Serrasanquirico, nell'anconetano, ma vi durò poco, non rispondendo tale lavoro alle sue aspirazioni. Fu un ricercatore molto attivo. L'opera che gli meritò il plauso maggiore tra i contemporanei fu appunto il *De Naturali vinorum historia*, pubblicata la prima volta a Roma nel 1596 (www.cavaliereidelvinoedeltartufo.it).
7. Il metanolo è un composto estratto dal legno che viene usato nell'industria come solvente ma è presente nel vino in piccole quantità per via dell'idrolisi enzimatica che avviene durante la vinificazione. Il caso del metanolo iniziò con la legge 408, del 28 luglio 1984, emanata in ottemperanza alla sentenza della Corte di giustizia dell'Unione europea del 1982 del 1983 che accusava l'Italia di discriminare i prodotti alcolici di importazione. Lo Stato decise così di detassare il metanolo. In Italia il metanolo a fine anni '80 passò dal costare 5 mila lire a 500, rendendolo così un valore aggiunto per il mercato nero degli alcolici.

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Abstract

Bassa Langa and the Departure from Marginality: The Creation of a Divine Landscape and of Wine, between Enogastronomical Tourism and Authenticity

In the collective imagination, the identity brand of the Langhe (Mons Langa et Bassa Langa), a hilly region located south and east of the Tanaro River (Piedmont, northern Italy) and included on the UNESCO World Heritage in 2014, consists of wine and food. In actual fact, the Langhe are a complex and diverse geographical area no longer deemed to be marginal, and enogastronomical tourism has become the key to success as a model for tourism, preserving the quality and authenticity of the local culture, environment, and landscape.

Keywords

Langhe, internal areas, marginal areas, wine, tourism, UNESCO

Communication of Social and Environmental Sustainability Practices by Portuguese Rural Tourism Companies

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The general objective of this study is to find out whether Portuguese RT companies communicate their social and environmental sustainability practices through social media.

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1. Introduction

RURAL TOURISM (RT) was seen as an important driver in the revitalization of rural areas that were undergoing decline, especially in Europe in the postwar period (Tulik 2000). In the second half of the 20th century, there was an increasing demand for leisure activities, reflected by the rise in wages among the general population, advances in the transport and communication sectors, and political and cultural manifestations (Rodrigues 1997). It is imperative to research the importance of RT in the European Union, as it covers 91% of the territory and 59% of the total population (Giannakis 2014). Thanks to RT, entire regions may benefit from an economic activity that can

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ensure revitalization and profitability, while focusing on sustainable development (Garau 2015).

Sustainability is an important factor in the development of tourism (Chin, Thian, and Lo 2017). It represents one of the four valences investigated in RT and is relevant due to its socio-cultural impact on regions. On a social level, sustainability can be achieved by preserving the moral values of the community and the historical and cultural heritage of a given region (Fong and Lo 2015). On an environmental level, sustainability can be influenced by tangible and intangible factors, as it relates to environmental impacts and raising public awareness towards their preservation, management, and conservation (Chin, Thian, and Lo 2017). Choi, Lehto, and Morrison (2007) also highlight the importance of two other dimensions of sustainability: political and technological. The technological evolution of recent years benefits RT companies that communicate their services and products on online platforms (Pato and Duque 2021).

Our analysis has shown that there are few studies on this subject in Portugal. Pato and Duque (2021) only considered communications that were carried out on websites in the Viseu Dão-Lafões region. Another study carried out a content analysis of RT companies by considering their presence on the following social media platforms: Facebook, Google+, LinkedIn, Instagram, and Twitter (Oliveira, Correia, and Fernandes 2017). Tiago, Gil, Stemberger, and Borges-Tiago (2021) studied the communication strategies of RT companies and their sustainable communication practices in terms of social media, websites, and booking platforms in the Azores archipelago.

Given the gap detected, the general objective of this study is to understand whether Portuguese RT companies communicate their social and environmental sustainability practices through social media, their own websites, or through external booking platforms. This study also aims to understand which sustainable and environmental communication practices are most communicated and which accommodation platforms are most used to communicate sustainability practices.

This research is structured as follows: first, the topic is introduced through a literature review that focuses on the concepts of RT, sustainability, and digital communication. Next, we present the unit of analysis, the indicators used to analyze the communication of social and environmental sustainability practices, and the methods used. In the next step, the results of the content analysis are presented. Finally, conclusions, limitations, and future lines of research are presented.

2. Literature Review

HISTORICALLY, RT has been a recognized concept since the late 19th century (Perales 2002; Gao and Wu 2017). There has been a high level of growth and evolution of RT since the 1970s, and it has been recognized by markets and government entities alike. The concept of RT differs from the traditional concept of tourism as it entails reusing pre-existing buildings and the recourse to heritage (Lane and Kastenholtz 2015). The concept of RT is difficult to define due to the heterogeneity of regions and countries (de Sousa and Kastenholtz 2015). In various regions of Europe and North America, RT was seen as a way to enhance rural landscapes (Lane and Kastenholtz 2015).

Implementing RT does not always result in advantages, as there are studies (Fong and Lo 2015; Muresan et al. 2016; Demirović Bajrami et al. 2020) that point to both positive and negative impacts. For a successful RT implementation in a given region, active participation and support from local communities are required (Fong and Lo 2015; Demirović Bajrami et al. 2020). The tourism sector is relatively new, yet it easily embraces notions of sustainability, as it relates to the use of resources and the environment (Tiago, Gil, Stemberger, and Borges-Tiago 2021). The recent COVID-19 pandemic has impacted everyday life and businesses alike. However, despite its adverse impact on tourism in general, there is evidence that shows that the pandemic has provided new opportunities for RT (Seraphin and Dosquet 2020; Stankov, Filimonau, and Vujičić 2020; Wen, Kozak, Yang, and Liu 2020; Zhu and Deng, 2020).

The concept of sustainable development was defined in the report *Our Common Future* (1987) as “meeting the needs of the present without compromising the ability of future generations to meet their own needs.” Sustainability is seen as a global and multidimensional complex challenge. Due to pressure from society and government bodies, companies are challenged to develop a set of practices and skills related to sustainability. There is a need to interact with external stakeholders to find a sustainable vision for future environmental and social problems, based on economic solutions (Hart and Milstein 2003). Sustainability is an important factor in tourism development (Chin, Thian, and Lo 2017). Combined with RT, sustainable development is seen as a set of policies and strategies that can be used to maximize benefits and reduce negative effects on regions (Ertuna and Kırbaş 2012).

Sustainability is based on three main pillars, known as the Triple Bottom Line (TBL). Elkington (1997) defined this term by using the terms “profit,” “people” and “planet,” corresponding to “economic,” “social” and “environmental” pillars, respectively. TBL is a tool used to measure the performance and success of a given organization at the economic, social, and environmental levels

(Goel 2010). In RT, the three main pillars of sustainability—economic, social, and environmental—are also present (Pato and Duque 2021). Sustainability has proven to be an important factor for tourism (Tiago, Gil, Stemberger, and Borges-Tiago 2021). Therefore, it is important for RT companies to adopt sustainable communication practices, as it encourages consumers to purchase sustainable products and services (Tölkes 2018).

In terms of the economic pillar, RT is influenced by stimulating entrepreneurship regarding the infrastructures and activities associated with this economic activity (Akis, Peristianis, and Warner 1996; Gursoy and Rutherford 2004). The economic sustainability of destinations is important for a destination to be competitive, as the popularity of RT has been steadily growing (Maguire and Hanrahan 2017; Wise 2020). The implementation of RT in regions may have an economic impact on the population by generating new sources of income, putting local resources to good use, and changing the purchasing power of residents.

Regarding the social pillar, there is an impact on the quality of life of the adjacent populations, since tourism can bring social problems such as crime, and impact the moral values of the community (Fong and Lo 2015), as well as interfere in the relationships between residents, health, and safety issues (Demirović Bajrami et al. 2020). Sustainability on a social level can be achieved when a given tourist destination successfully preserves the historical and cultural heritage of its region (Sanagustin Fons, Moseñe Fierro, and Gómez y Patiño 2011). A low level of social sustainability implies a loss of culture in the regions where rural tourism is implemented. There is a traditional and cultural aspect associated with rural regions at risk of changing. This further proves the need to think about sustainability and RT in a symbiotic way by both safeguarding the cultural traditions and authenticity of destinations (Lane and Kastenzholz 2015) and ensuring a cultural exchange (Chen and Gursoy 2001). The greater the connection between local communities and tourism, the better the communities' perceptions of tourism. The perception of communities is beneficial for tourism, as it contributes to future tourism strategies (Muresan et al. 2016).

The environmental sustainability pillar involves efficient practices regarding energy and water resources, emissions reduction, and the ecological footprint, among others (Goel 2010; Hsieh 2012). Hiltunen (2007) concluded that RT represents a more environmentally sustainable economic activity if the accommodation results from the use of existing infrastructures, since the construction of new infrastructures has an impact on the landscape and can possibly lead to changes in local fauna and flora, as well as increased pollution.

Tourism has an impact on regions and some communities are unable to evaluate these impacts. These impacts of tourism on regions are not only difficult to perceive, but, in the long term, the perception of communities on tourism can change if they feel that the government or other government entities

are not paying enough attention to the needs and concerns of their regions. It is necessary to periodically assess the interests of communities to optimize the allocation/concentration of resources (Muresan et al. 2016).

Corporate digital communication has become an important promotional tool in the tourism sector (Camilleri 2017). It allows not only reaching new target audiences (Buhalis and O'Connor 2005), but also contributing to further trust between customers and organizations (Camilleri 2017). Via innovative, scalable systems for recommending products, analyzing data, and disseminating opinions and news, social media emerges as an important means of communication for companies (Camilleri 2017). These tools are configurable and can be adapted to share relevant information through interactive media (Schultz, Utz, and Göritz 2011).

The importance of social media is particularly evident at the consumer level. These platforms facilitate the creation of events at the community level, making it possible to organize them on different scales. Events organized by consumers bring benefits for regions as they trigger the creativity of participants, contributing to the promotion of regions and to dissemination in different communities (Marine-Roig, Martin-Fuentes, and Daries-Ramon 2017). Hussain, Chen, and Nurunnabi (2019) have shown that the use of social media is essential for the development of regions. For the development of territories, tourism operators must foster a healthy relationship with tourists, which can be enhanced through the use of social media.

Tiago, Gil, Stemberger, and Borges-Tiago (2021) have reviewed the research of various authors and analyzed the communication practices of licensed tourism companies in the Azores archipelago, considering their digital presence on websites, accommodation booking platforms, and social media. Their presence was also analyzed on websites that promoted accommodation. The authors highlighted the importance of eco-certification as an advantage for guests, meaning that the company acts on the principles of sustainability. Tafesse (2015) pointed out that companies use social media such as Facebook to publish brand-related content, using this platform to interact with their consumers/clients. Martínez-Rolán et al. (2019) has mentioned Instagram as a powerful hypermedia tool, with a narrative potential where publications help to cement a relationship strategy with a particular location. By investigating the presence of Historic Villages on Instagram, this author concluded that this social media is an important factor in promoting territorial innovation. Finally, D. Foris, Crihalmean, and T. Foris (2020) carried out a study exploring environmental practices through international and local booking platforms. For the study, they considered the Booking.com platform, TripAdvisor, Directbooking.ro and Travelminit.ro. Their study analyzed environmental practices according to the filters present on the platforms and via the comments posted by tourists.

3. Methodology

THE GENERAL objective of this study is to find out whether Portuguese RT companies communicate their social and environmental sustainability practices through social media, their own websites, or through external booking platforms. This study also has the specific objectives of understanding which sustainable and environmental communication practices are most commonly communicated and which platforms the accommodations use the most to communicate their sustainability practices.

This study covers the regional tourism areas (RTA) of mainland Portugal (fig. 1), which include the entire area covered by the five units that constitute the second hierarchical level of Portugal's Territorial Units for Statistics (NUTS II), defined in Law no. 33/2013, of May 16 (Law no. 33/2013, 2022) of the Portuguese legislation.

The unit of analysis of this research is composed of the Portuguese Code of Economic Activities 55202—Tourism in Rural Areas, which covers accommodation in private dwellings, whether they are housing tourism, agritourism, RT, or village tourism, and the need to “comply with the legal requirements for family-owned tourism businesses” (CAE 55202—Tourism in Rural Areas, 2022). This research unit comprises 500 RT accommodations in Portugal. The database for this research unit was kindly provided by Informa D&B. Each RTA contributes with a total of 100 companies to the unit of analysis.

Considering the objectives of this study and the literature review, the following table was developed (table 1), which contains the relevant indicators to be analyzed on social media, own websites, and booking platforms external to companies.

TABLE 1. SOCIAL SUSTAINABILITY AND ENVIRONMENTAL SUSTAINABILITY INDICATORS

Social sustainability	Environmental sustainability
	Energy efficiency (EE)
	Water saving (WS)
	Waste management (WM)
	Sustainable accommodation construction (SC)
	Biological/endogenous products
Support for employees (SE): training and orientation towards sustainability	
Heritage conservation (HC)	
Community involvement (CI): support for local employability, community-oriented projects	Renewable energy (RE)
	Sustainability certifications and awards (CA): ISO 14001 series of standards or sustainability- related awards

SOURCES: Hsieh (2012); Olya et al. (2021); Pato and Duque (2021); Tiago, Gil, Stemberger, and Borges-Tiago (2021).

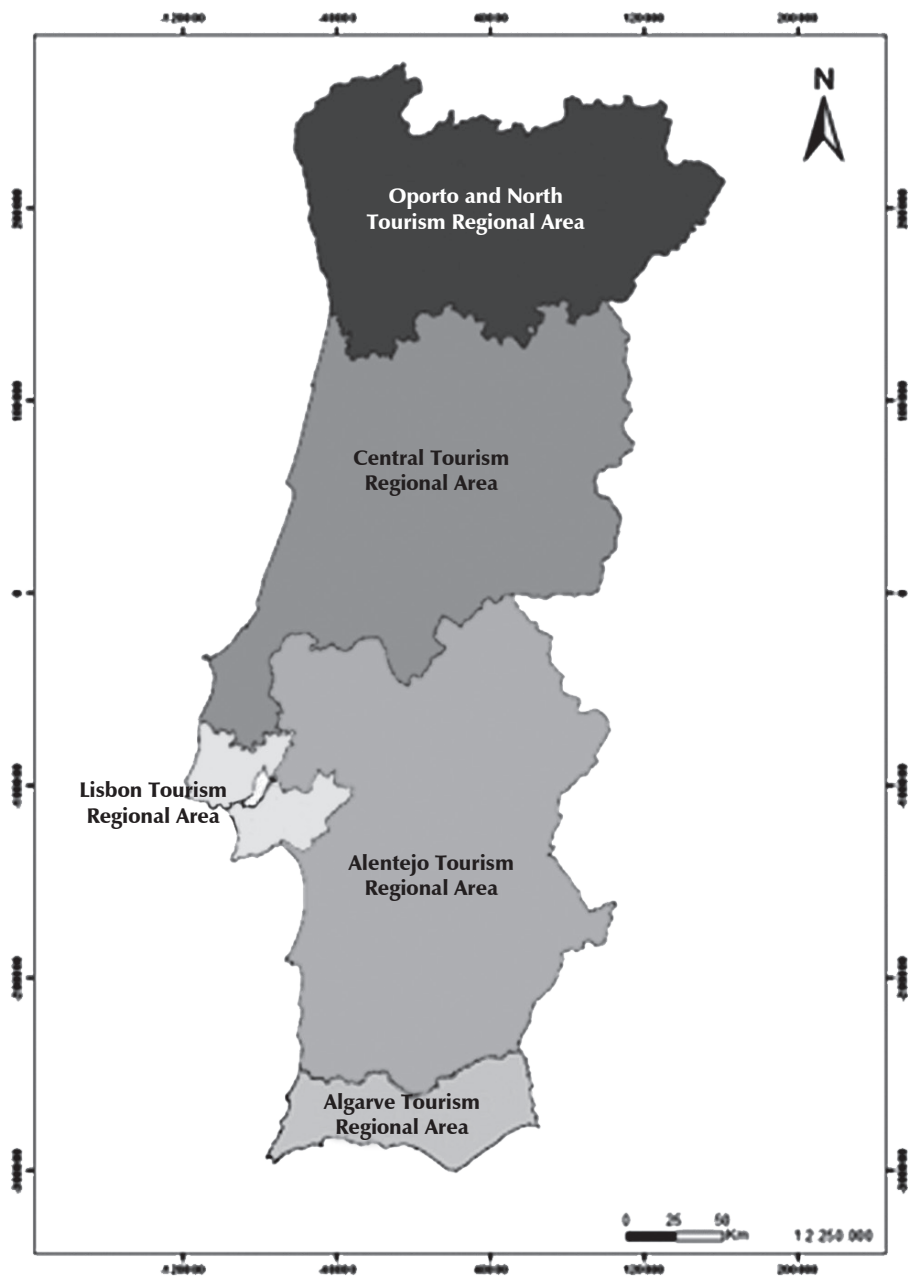


FIG. 1. PORTUGUESE REGIONAL TOURISM AREAS
 SOURCE: Estevão et al. (2018), 41.

In order to collect data for subsequent analysis, the web scraping method will be used, as shown in table 2. This method involves the process of collecting specific data information by accessing predefined websites (Kienle, German, and Müller 2004). This method aims to collect and obtain data in a structured way.

TABLE 2. DATA COLLECTION METHOD FOR CONTENT ANALYSIS

Geographical area	Regional tourism areas of mainland Portugal
Unit of analysis	CAE 55202—Tourism in Rural Areas
Data collection tool	Content analysis
Total sample	100 companies
Platforms	Social media platforms (Facebook and Instagram); Own websites; Booking platform (Booking.com)
Data collection method	Web scraping
Collection period	20 May 2022 to 20 August 2022
Data analysis method	Hillen’s content analysis method (2019)

SOURCE: Authors’ creation.

To examine the data, an analysis will be carried out through the “content” analysis methodology, a common method in the field of social science research (Camprubí and Coromina 2016). This method evaluates communication at different levels and through different communication methods, providing a starting point for further research (Kolbe and Burnett 1991). The research of Pato and Duque (2021) and Hsieh (2012) served as a basis for the construction of the content analysis of this scientific contribution, as both authors established a set of components to conduct their research.

Companies’ sustainable communication will be researched based on the social media platforms Facebook (Tafesse 2015) and Instagram (Martínez-Rolán et al. 2019), on the websites developed by the companies themselves (Pato and Duque 2021), and on a booking platform, Booking.com (D. Foris, Crihalmean, and T. Foris 2020). The database for this contribution was obtained through a matrix with two options, based on the research by Pato and Duque (2021) and Tiago, Gil, Stemberger, and Borges-Tiago (2021). In the presence of a particular communication regarding a sustainable practice was present, the number 1 was entered. Conversely, in its absence, the number 0 was entered.

Companies were selected from each of Portugal’s five different regional tourism areas (fig. 1). For the purposes of data analysis, 6 months of pre-visit publications on the social media platforms Facebook and Instagram were taken into account. As for the websites and the Booking.com platform, only the current state of the pages was considered for analysis. All the data were collected from

visits to the social media pages of accommodations, websites, and the Booking.com platform between 20 May 2022 and 20 August 2022.

To simplify graph reading, the indicators have been given as acronyms. Regarding “social sustainability,” support for employees is referred to as SE, heritage conservation as HC, and community involvement as CI. As to “environmental sustainability,” energy efficiency is designated as EE, water saving as WS, waste management as WM, sustainable accommodation construction as SC, biological/endogenous products as B/EP, the presence of renewable energies as RE, and the presence of certifications and awards as CA.

4. Results

4.1. General Analysis

IN WHAT CONCERNS the five regional tourism areas of mainland Portugal, an analysis was made of the total sample of 100 companies, considering location, company category, turnover, legal form, start date, and, finally, presence on online platforms.

4.1.1. COMPANY LOCATION

Regarding location, counties pertaining to each of the five regional tourism areas analyzed were defined. Breaking down these counties, the North RTA totals 86 municipalities; the Central RTA totals 100 municipalities; the Lisbon RTA totals 18 municipalities; the Alentejo RTA totals 58 municipalities; lastly, the Algarve ART has a total of 16 municipalities, making it the region with the fewest municipalities represented.

4.1.2. COMPANY CATEGORY

All the companies in the sample are SMEs, and there are no companies with more than 250 employees. The average number of employees of the 100 companies in the sample is 11.16. Table 3 shows the number of micro-, small, and medium-sized companies in the sample.

TABLE 3. CATEGORIZATION OF THE COMPANIES IN THE SAMPLE

Micro	Small	Medium
66	30	4

SOURCE: Authors' creation.

The total number of companies in the sample falling within the “micro” category, or having up to 10 employees, is 66. The total number of companies in the sample falling within the “small” category, or having between 11 and 50 workers, is 30, while the total number of companies within the “medium” category, or employing between 51 and 250 workers, is 4. The only regional tourism areas having “medium” category companies are from North RTA and Central RTA. Companies within the “micro” or “small” category are present in all RTAs.

4.1.3. TURNOVER

The turnover of all the companies in the sample is shown in the following table:

TABLE 4. COMPANIES' TURNOVER, IN EUROS, IN 2020

>1,000,000	<1,000,000 & >500,000	<500,000 & >250,000	<250,000 & >100,000	<100,000
10	11	31	19	4

SOURCE: Informa D&B.

The most prominent group of companies in the sample has a turnover between €250,000 and €500,000. The company with the highest turnover is in the North RTA, with results of €3,410,634.93. The company with the lowest turnover is located in the Algarve RTA, with a turnover of €92,867.98.

4.1.4. LEGAL FORM

The legal status of the 100 companies in the sample is shown below:

TABLE 5. LEGAL FORM OF THE COMPANIES IN THE SAMPLE

Private limited company	Public limited company	Single-member limited company
72	17	11

SOURCE: Informa D&B.

4.1.5. START DATE OF ACTIVITY

Fig. 2 shows the date on which the 100 companies in the sample started their operations.

It is possible to observe in the image that most of the analyzed companies started operating in 2000, making up 79% of the sample. 10 companies appear in the leftmost column, “<=1995,” meaning that the 10 mentioned companies were founded in 1995 or before. Of these 10 companies, 1 belongs to the North RTA, having started operating in 1990. 1 company belongs to the Central

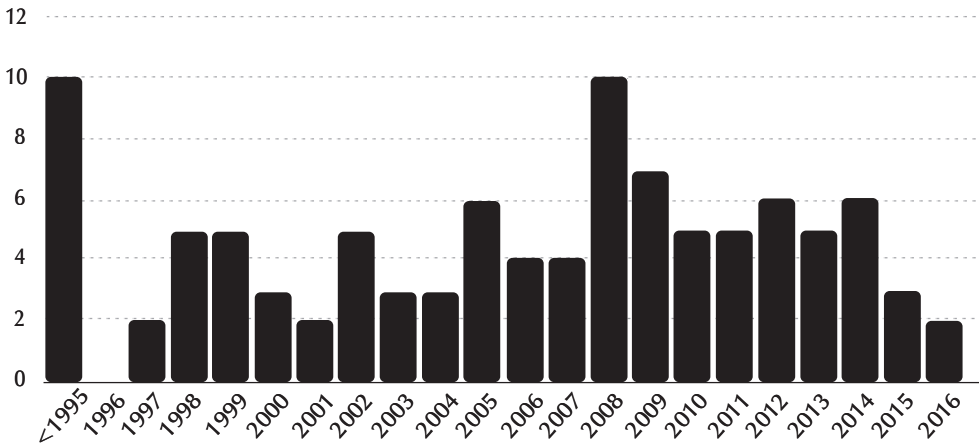


FIG. 2. YEAR IN WHICH COMPANIES IN THE SAMPLE STARTED OPERATING
SOURCE: Informa D&B.

RTA, which is the RTA with the oldest company in the sample, dating back to 1958. The sample uses data available in 2020 and includes the companies with the highest turnover. There are no companies in the sample with a start date after 2016. 2008 was the year in which the largest number of companies started their operations, with a total of 10 companies.

Analyzing them by decade, 4% of the analyzed companies have started operating before 1989, 16% between 1990 and 1999, 47% between 2000 and 2009, and 32% in the 2010s.

4.1.6. DIGITAL PRESENCE

The digital presence on the four online platforms (websites, Facebook, Instagram, and Booking.com) of the RT accommodations in the five regional tourism areas was analyzed to find out whether each accommodation was present on these platforms and whether it was active. Regarding the companies' websites, if they were active, the accommodation was considered to have a presence. If it was not active or could not be accessed, it was considered not present. Regarding the social media platforms Facebook and Instagram, the company was considered present when the accommodation had a page on these media and featured publications in the 6 previous months. If the page was not available or there had been no posts in the 6 previous months, the company was considered not present. As for the Booking.com platform, accommodation was considered present when it was available and could be accessed. If the accommodation was inactive on the platform or not available, it was considered not present.

It can be seen in table 6 that 2 accommodations do not have a website available, 14 accommodations do not have a Facebook page or are not active on this social media, 20 accommodations do not have an Instagram page or are not active on this platform, and 10 accommodations are not available on the Booking.com platform.

TABLE 6. NUMBER OF ACCOMMODATIONS WITHOUT A PRESENCE ON ONLINE PLATFORMS

Number of accommodations without an online presence (all regional tourism areas)			
Companies' websites	Facebook	Instagram	Booking.com
2	14	20	10

SOURCE: Authors' creation.

4.2. North RTA

THE NORTH RTA is the first one analyzed, totaling 86 municipalities. The 20 companies analyzed in this region are located in the municipalities of Armamar (2), Barcelos (2), Oporto (2), Vila Real (2), Alijó (1), Amaranate (1), Baião (1), Chaves (1), Guimarães (1), Lamego (1), Monção (1), Sernancelhe (1), Terras de Bouro (1), Vieira do Minho (1), Vila Verde (1), and Vimioso (1). The average number of employees in all establishments is 13.65, with a maximum of 73 employees and a minimum of 2. In terms of sales and services provided in 2020, the company with the highest turnover totaled €3,410,634.93. The business with the lowest turnover totaled €181,773.51. The average turnover of the accommodation analyzed in the North RTA is €504,414.74, and the median is €327,071.12. Regarding company category, the sample includes 13 companies in the “micro” category, 6 companies in the “small” category, and 1 company in the “medium” category. In terms of legal form, 13 are private limited companies, 4 are public limited companies, and 3 are single-member limited companies. Looking at the year of start of operations, 5 companies started up before 1999, 11 between 2000 and 2010, and 4 companies after 2010. Among the companies analyzed in this RTA the oldest one started its activity in 1990, and the most recent in 2016.

Fig. 3 shows the communication of sustainable environmental and social practices in the four platforms analyzed in this study in the North RTA.

According to fig. 3, it can be concluded that the communication of sustainability practices on the companies' websites and on the Booking.com platform emerges as the most relevant in the sample, with 55 and 42 practices identified, respectively. On the other hand, the social media platforms Facebook and In-

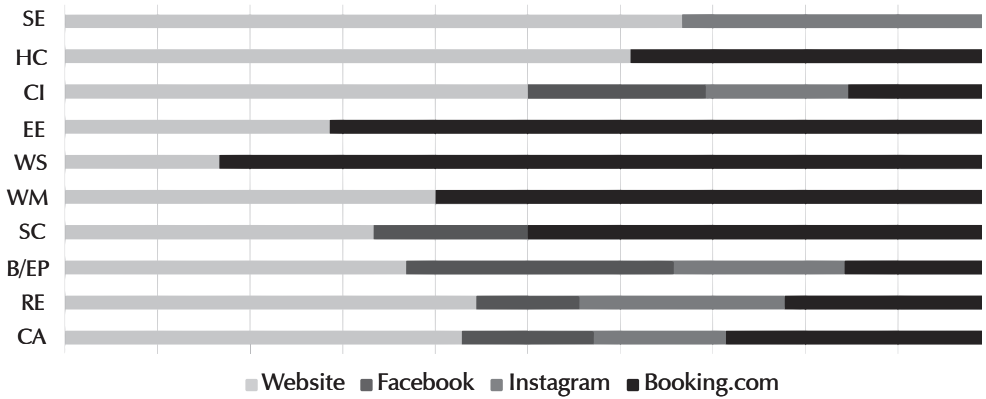


FIG. 3. COMMUNICATION OF NORTH RTAS SUSTAINABILITY PRACTICES ON ONLINE PLATFORMS
SOURCE: Authors' creation.

stagram are less represented in the sample, with a total of 19 and 15 practices, respectively.

Fig. 4 shows the number of social and environmental sustainability practices reported on all online platforms by the 20 North RTA's accommodations.

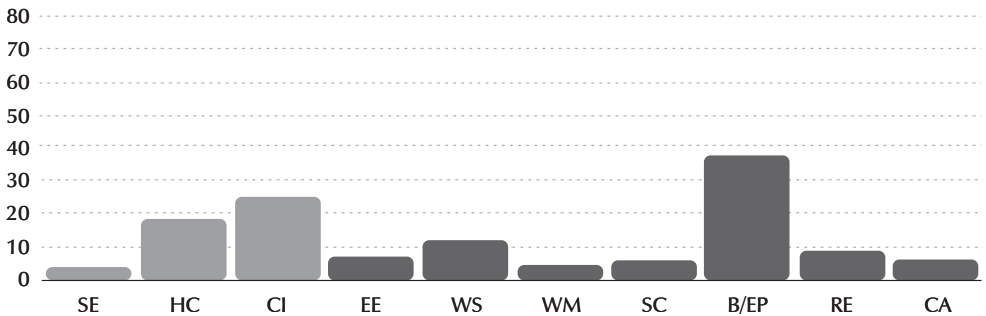


FIG. 4. SUSTAINABILITY PRACTICES COMMUNICATED BY THE NORTH RTAS
SOURCE: Authors' creation.

Regarding social sustainability, a total of 47 practices were identified. After analyzing the communication of each of the practices, we saw that a total of 26 companies have community involvement communication, 18 have heritage conservation communication, and 3 have employee support communication. In terms of environmental sustainability, 84 practices were identified. In total, 38 companies communicate about endogenous and biological products, 12 about water saving, 9 about renewable energy, 7 about energy efficiency and certifications and awards, 6 about sustainable accommodation construction, and 5 about waste management.

4.3. Central RTA

THE SECOND region, represented by the Central RTA, includes a total of 100 municipalities. The 20 companies analyzed in this region are located in the municipalities of Fundão (2), Gouveia (2), Seia (2), Alcobaça (1), Caldas da Rainha (1), Castelo Branco (1), Lourinhã (1), Lousã (1), Mantigas (1), Mêda (1), Mira (1), Óbidos (1), Ourém (1), Pinhel (1), Porto de Mós (1), Torres Vedras (1), and Vouzela (1). The average number of employees is 19.1, with a maximum of 57 and a minimum of 2. In terms of sales and services provided in 2020, the establishment with the highest turnover totaled €2,618,086.26, and the one with the lowest turnover totaled €227,091.19. On average, the turnover of the analyzed accommodations belonging to the Central RTAs totaled €704,712.09. The median value is €423,637.62. Regarding company categories, there are 8 “micro” category companies, 3 “medium” category companies, and 9 “small” category companies. In terms of legal form, 16 companies are “private limited companies,” 2 companies are “public limited companies,” and 2 are “single-member limited companies.”

Considering the date when the company started operating, 1 company started before 1999, 14 companies between 2000 and 2010, and 5 from 2010 onwards. The oldest company started business in 1958, and the most recent in 2012.

As can be seen in fig. 5, there are communications of sustainable environmental and social practices on the four platforms analyzed in this study regarding the Central RTA.

According to fig. 5, the Booking.com platform is the most relevant in the sample, with a total of 86 practices identified. Company websites are the second

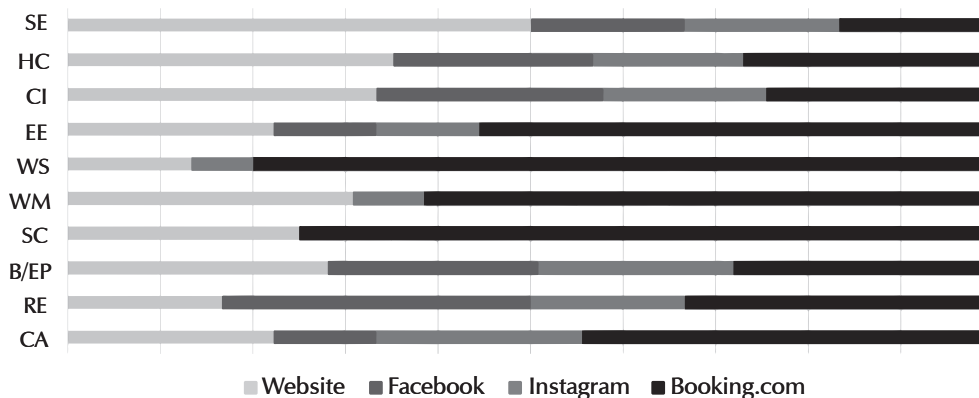


FIG. 5. COMMUNICATION OF THE CENTRAL RTAS SUSTAINABILITY PRACTICES ON ONLINE PLATFORMS
SOURCE: Authors' creation.

platform where the majority of practices were identified, with a total of 67. 41 practices were identified on Facebook. Finally, 36 sustainable communication practices were identified on Instagram.

Fig. 6 shows the number of social and environmental sustainability practices communicated on all online platforms by the 20 Central RTAs accommodations.

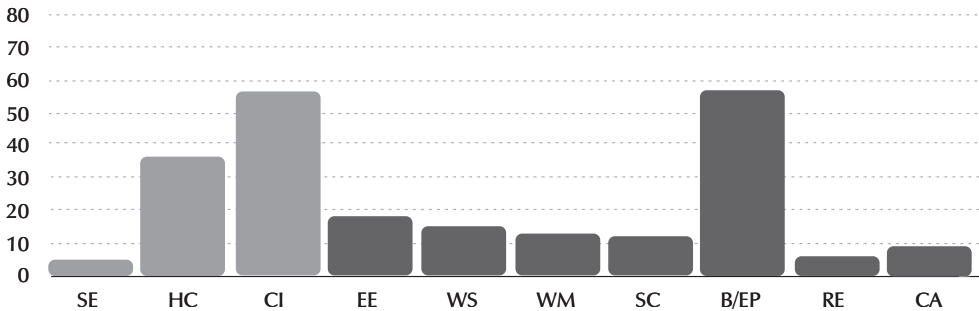


FIG. 6. SUSTAINABILITY PRACTICES COMMUNICATED IN THE CENTRAL RTA
SOURCE: Authors' creation.

According to fig. 6, at a social level, a total of 100 sustainable communication practices were identified. Of these, 57 companies communicated practices related to community involvement, 37 regarding heritage conservation, and 6 related to employee support. Regarding environmental practices, a total of 130 were identified. Of these, 57 practices related to endogenous and biological products, 18 to energy efficiency, 15 to water saving, 13 to waste management, 12 to sustainable construction, 9 to certifications and awards, and 6 to the use of renewable energies.

4.4. Lisbon RTA

THE THIRD analyzed region is represented by the Lisbon RTA, which has a total of 18 municipalities. The 20 companies analyzed in this region are located in the municipalities of Lisbon (8), Setúbal (3), Sintra (3), Mafra (2), Cascais (1), Loures (1), Oeiras (1), and Vila Franca de Xira (1). The average number of employees of the companies analyzed in this ART is 6.06, with a maximum of 17 employees and a minimum of 1. Regarding sales and services provided during 2020, the establishment with the highest turnover totaled €1,985,304.85 and the establishment with the lowest turnover totaled €31,510.17. The average turnover of the establishments analyzed is

€289,409.10, and the median is €120,228.62. Considering company category, the 20 companies in this ART include 12 “private limited companies,” 4 “public limited companies,” and 4 “single-member limited companies.”

As regards the start date, 8 companies started business before 1999, 7 between 2000 and 2010, and 5 after 2011. The oldest company dates back to 1960, and the most recent one to 2016.

According to fig. 7, the communication of sustainable environmental and social practices on the four platforms analyzed in this study are present in the Lisbon RTA. In this RTA, companies choose to communicate more on their websites, with a total of 52 practices identified.

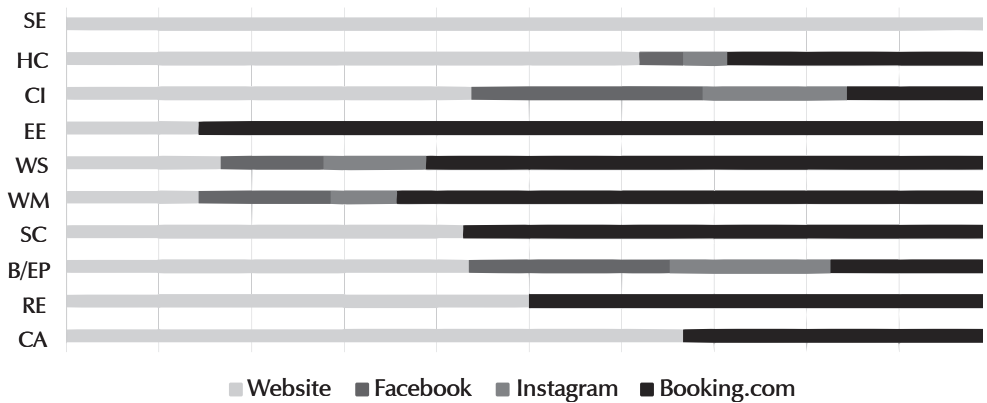


FIG. 7. COMMUNICATION OF LISBON RTAs SUSTAINABILITY PRACTICES ON ONLINE PLATFORMS
SOURCE: Authors' creation.

Booking.com is the second platform with the highest number of communications, with a total of 49 practices identified. In terms of social media, this RTA features little expression. In total, 18 practices were identified on Facebook, and 13 on Instagram.

Fig. 8 shows the number of sustainable social and environmental communication practices of the 20 companies analyzed in the Lisbon RTA. A total of 54 practices were identified at the social level: 32 businesses have sustainable communication practices related to community involvement, 21 related to heritage conservation, and 1 related to employee support. In terms of the environment, a total of 78 practices were identified.

23 accommodations have sustainable communication practices related to endogenous/biological products, 18 related to water saving, 14 to waste management, 7 to energy efficiency and sustainable construction, 6 to renewable energies, and 3 to certifications and awards.

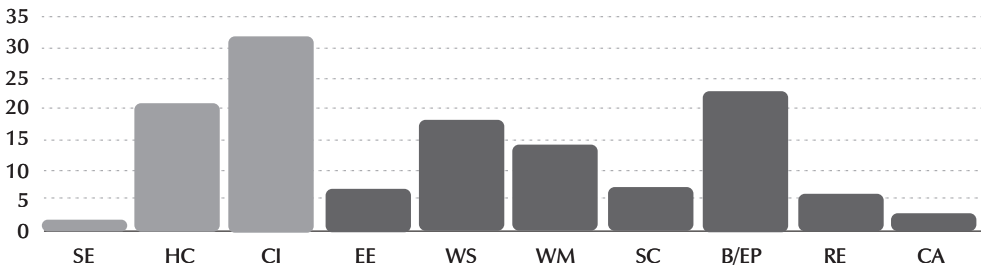


FIG. 8. SUSTAINABILITY PRACTICES COMMUNICATED AT LISBON RTA
SOURCE: Authors' creation.

4.5. Alentejo RTA

THE 20 companies selected for this region are located in the municipalities of Odemira (7), Santiago do Cacém (2), Estremoz (1), Évora (1), Grândola (1), Marvão (1), Monforte (1), Portel (1), Reguengos de Monsaraz (1), Santarém (1), Serpa (1), Vidigueira (1), and Vila Viçosa (1). The average number of employees in the companies analyzed is 9.5, with a maximum of 30 employees and a minimum of 2. Regarding sales and services provided during 2020, the establishment with the highest turnover totaled €1,702,632.38, and the establishment with the lowest turnover totaled €243,518.38. The average turnover of the establishments analyzed is €493,754.32, and the median is €367,992.13. Regarding company category, of the 20 companies in this RTA,

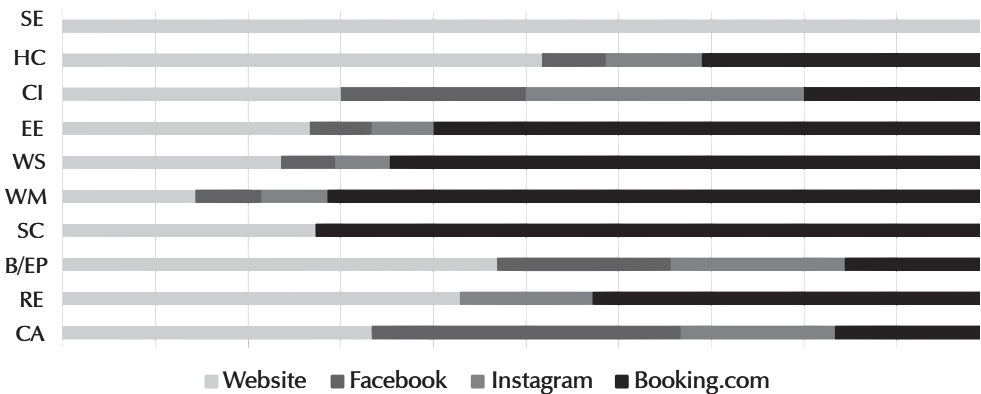


FIG. 9. COMMUNICATION OF THE ALENTEJO RTAS SUSTAINABILITY PRACTICES ON ONLINE PLATFORMS
SOURCE: Authors' creation.

18 are “private limited companies,” there are no “public limited companies,” and 2 are “single-member limited companies.”

In terms of the date on which the companies in this RTA started operations, 2 started operations before 1999, 11 companies between 2000 and 2010, and 7 after 2011. The oldest company dates back to 1997, and the most recent one to 2015.

As shown in fig. 9, communications about sustainable environmental and social practices are present on the four platforms analyzed in this study of the Alentejo RTA. In this RTA, companies chose to communicate more on the Booking.com platform, with a total of 64 practices identified.

Websites are the second platform where companies from this RTA communicate the most, with a total of 61 practices identified. In terms of social media, the number of practices identified is much lower, with 21 identified on Facebook and 26 on Instagram.

Fig. 10 shows the number of sustainable social and environmental communication practices of the 20 companies analyzed in the Alentejo RTA. A total of 70 social sustainable practices were identified. 40 companies carried out communication related to community involvement, 29 related to heritage conservation, and 1 related to employee support. Regarding environmental practices, a total of 102 were identified.

In total, 32 companies have sustainable communication related to endogenous/biological products, 17 to water saving, 15 to energy efficiency, 14 to waste management, 11 to sustainable construction, 7 to energy efficiency, and 6 to certifications and awards.

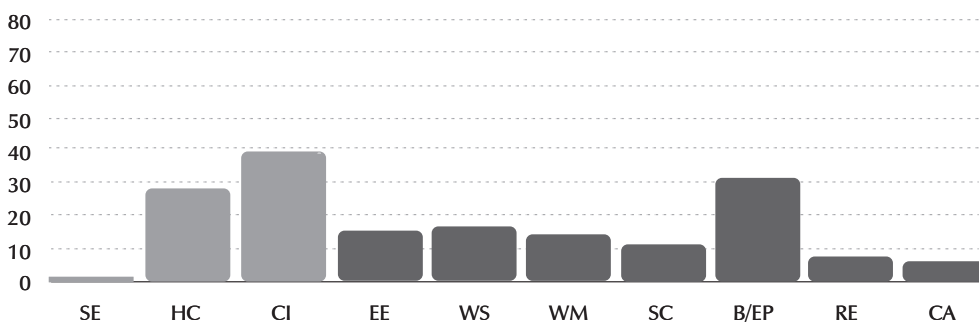


FIG. 10. SUSTAINABILITY PRACTICES COMMUNICATED BY THE ALENTEJO RTA
SOURCE: Authors' creation.

4.6. Algarve RTA

IN THIS RTA, the 20 businesses selected for this region are located in the municipalities of Aljezur (5), Tavira (3), Vila Real de Santo António (3), Lagos (2), Silves (2), Castro Marim (1), Olhão (1), Portimão (1), Tavira (1), and Vila do Bispo (1). The average number of employees in the companies analyzed in this RTA is 7.5, with a maximum of 21 employees and a minimum of 2. Regarding sales and services provided during 2020, the establishment with the highest turnover totaled €718,363.72, and the establishment with the lowest turnover totaled €92,867.98. The average turnover of the establishments analyzed is €267,923.28, and the median is €200,224.53. Regarding company category, the 20 companies in this RTA include 13 “private limited companies,” 1 “public limited company,” and 6 “single-member limited companies.”

Regarding the year in which the companies in this RTA started their operations, 5 started before 1999, 9 between 2000 and 2010, and 6 after 2011. The oldest company dates back to 1997, and the most recent one to 2015.

Fig. 11 shows the communication of sustainable environmental and social practices on the four platforms analyzed in this study for the Algarve RTA.

In this RTA, the majority of practices were identified on the Booking.com platform, with a total of 85 practices. Websites are the second platform where the companies in this RTA communicate the most, with a total of 62 practices identified. In terms of social media, Facebook has a total of 23 practices identified, and Instagram a total of 22. Fig. 12 shows all the social and environmental sustainability practices identified on the four online platforms analyzed for the Algarve RTA.

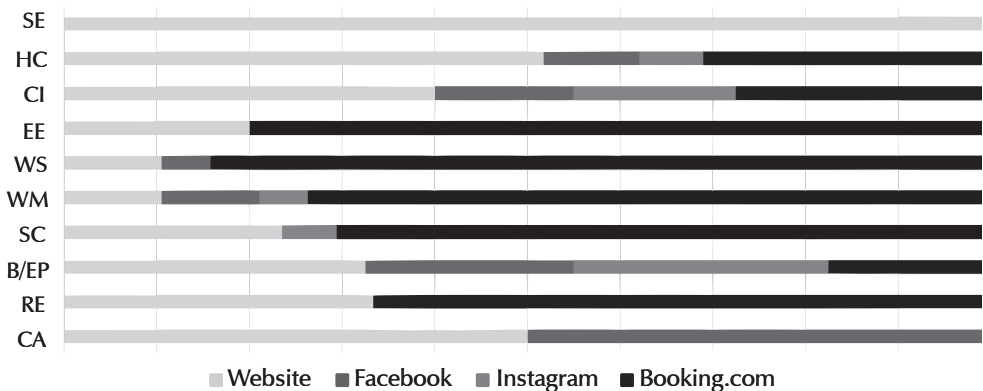


FIG. 11. COMMUNICATION OF THE ALGARVE RTAS SUSTAINABILITY PRACTICES ON ONLINE PLATFORMS
SOURCE: Authors' creation.

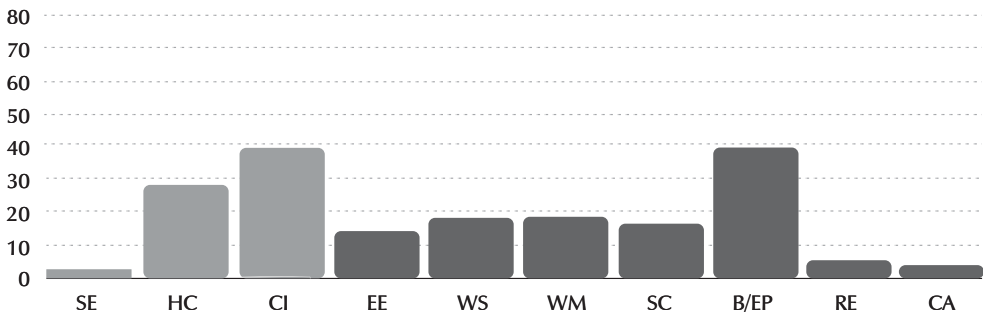


FIG. 12. SUSTAINABILITY PRACTICES COMMUNICATED BY THE ALGARVE RTAS
SOURCE: Authors' creation.

A total of 72 social sustainable practices were identified. Of these, 40 practices related to community involvement were identified, 29 related to heritage conservation and 3 to employee support. Environmentally speaking, a total of 120 practices were identified. Of these, 40 are related to endogenous/biological products, 19 to water saving and waste management, 17 to sustainable construction, 15 to energy efficiency, 6 to renewable energies, and 4 to certifications and awards.

5. Closing Remarks and Future Research

THIS RESEARCH allowed us to understand whether Portuguese RT companies communicate social and environmental sustainability practices on their social media pages and websites, or through external booking platforms, which sustainable and environmental communication practices are most communicated, and which platforms the accommodations use the most.

After analyzing the results, considering social sustainability, the Central RTA was the one with the highest number of sustainability practices communicated on their websites, on Instagram, and the Booking.com platform. Regarding Facebook, there was one more sustainability practice identified in the Alentejo RTA than in the Central RTA. Of all platforms, the Lisbon RTA had the lowest number of practices reported.

Considering the environmental sustainability practices, the Central RTA was the region with the highest number of practices communicated on social media. The Alentejo RTA stood out regarding the use of companies' websites, and the Algarve RTA regarding the use of Booking.com. At both a social sustainability level and at an environmental level, these results show that the Lisbon RTA was the region with the lowest number of practices communicated, as seen in

the analysis of the companies' websites and the social media platforms Facebook and Instagram. Only regarding the Booking.com booking platform did the North RTA represent the region with the lowest number of environmental sustainability practices.

It was also possible to analyze the platforms on which companies most often disseminate their social and environmental sustainability practices. Regarding the communication of social sustainability practices from all the regional tourism areas, on average, companies make a greater number of communications on their websites compared to other platforms. The platform with the lowest number of sustainable communications is Instagram. Concerning environmental sustainability, the Booking.com platform has the highest number of sustainability communications, followed by the companies' websites. The social media platforms Instagram and Facebook present similar results, with Instagram having 6 fewer practices identified than Facebook. The companies in the sample have an 88.5% presence on these platforms, which demonstrates the importance of digital communication as a tool for promoting the tourism sector (Camilleri 2017). However, although studies found in the literature (Marine-Roig, Martin-Fuentes, and Daries-Ramon 2017; Hussain, Chen, and Nurunnabi 2019) consider social media to be important for community development and dissemination, this study found that it is on this type of platform that there is less presence and sustainability communication.

Concerning social sustainability practices, community involvement is the most communicated practice in the Central, Lisbon, Alentejo, and Algarve RTAs. This shows that the companies analyzed are aware of the results of Muresan et al. (2016). Heritage conservation represents one of the most common practices of these businesses: it is the second most common practice in the Algarve RTA, and the third most common in the other regional tourism areas, which highlights the studies by Sanagustin Fons, Moseñe Fierro, and Gómez y Patiño (2011) and Hiltunen (2007).

As concluded by D. Foris, Crihalmean, and T. Foris (2020) and Tiago, Gil, Stemberger, and Borges-Tiago (2021), the presence of eco-certification is valuable data for guests. However, Tiago, Gil, Stemberger, and Borges-Tiago (2021) concluded that there is not much involvement of companies with international certifications. This study found similar results, with the "certifications and awards" indicator being the least relevant among all those identified regarding environmental sustainability.

This study has its limitations, which can even be considered as guidelines for the development of future research. Firstly, the turnover of the companies included in the sample only relates to 2020. Other companies can be selected for research by considering a different year. Another factor to take into account is the impact of the COVID-19 pandemic in Portugal in 2020, which may have had an atypical impact on the turnover of the companies analyzed. Secondly, the collection period

should cover the period from 20 May 2022 to 20 August 2022, considering the 6 months prior to the visit on the social media platforms Facebook and Instagram and the date of visit on the companies' websites and bookings on the Booking.com platform. Other future lines of research include the investigation, using the same methodology, of RT businesses or other types of companies in other countries or regions. Additionally, this study could be complemented by conducting interviews to understand why there is little communication of sustainability practices. □

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Abstract

Communication of Social and Environmental Sustainability Practices by Portuguese Rural Tourism Companies

Rural tourism brings many benefits to both consumers and regions, representing a relaxing and authentic type of tourism. While the concept is difficult to define, rural regions may benefit from rural tourism, as it contributes to the creation of jobs and infrastructure maintenance. For rural-related businesses, rural tourism is also beneficial, as new product lines and services may be created to meet tourists' needs. If rural tourism companies adopt a digital approach while focusing on sustainable communication, they attract attention from tourists as being sustainable, which is an important factor when tourists choose a destination. The present study aims to investigate the sustainable communication practices of rural tourism companies in mainland Portugal.

Keywords

sustainability, rural tourism, digital communications, content analysis

Belasitsa Nature Park, Bulgaria

A New Perspective on the Nature– Culture Relationship and Rethinking Cultural Heritage in Podgorie Region

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The efforts of the competent authorities to convince the local population of the importance and benefits of the protected status of their environment usually include the cultural heritage.

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Introduction

DESPITE THE parallel existence and development of the awareness of the importance of nature and of culture preservation, to a great extent the Western imaginaries of nature and culture and the division between them are still heavily present (see West et al. 2006). According to Jessica Brown (2015, 33) “in the world of conservation practice, a perceived divide between nature and culture persists.” That is why it is no surprise that the establishment of protected areas has often been opposed by local resident populations. Gradu-

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ally, among the nature conservation community, the idea arose of the critical importance of bridging the nature-culture gap. Noting the importance of places where the interactions of humans and nature over time have contributed to biodiversity, at the 5th IUCN World Parks Congress in 2003 participants argued for a greater understanding of the link between cultural diversity and biodiversity and recognized the need for linkages between protected areas and the broader landscape in order to achieve conservation goals, while calling for more holistic approaches that incorporate social and cultural dimensions (Brown 2015, 36). This approach is termed *protected landscape approach* (see Brown et al. 2005). It should lead to the understanding of the protected area not only as a limitation, as a constraint on the development of the territory, but as a source of competitive advantages for the area. This understanding should be at the root of a new model of protection that would reconcile the need to protect the environment with the need for socioeconomic development (Zabetta 2015, 202). People perceive their surroundings in the light of their culture—the surroundings are not thought of in terms of biodiversity, plant and animal habitats, endangered species, ecosystems, etc., but rather in terms of things important to cultural identity and everyday life, such as livelihood, firewood, food, culinary practices, historical and sacred places, etc. Thus, as David Lowenthal puts it, most people identify more easily with cultural heritage than with nature, hence they are more likely to support the preservation of the former (Lowenthal 2005, 86). From the perspective of socioeconomic development and cultural heritage preservation, tourism plays a crucial role for the protected areas. As West et al. put it, “Ecotourism enterprises are symbiotic with protected areas. If there is a protected area, some form of ecotourism likely uses it” (2006, 262). Proceeding from this assertion, this study examines the nature-culture interrelationship by focusing on the process of ecotourism development in the Podgorie region¹ in the context of the establishment of Belasitsa Nature Park, Bulgaria. According to the Bulgarian legislation, nature parks fall in IUCN Category V (protected landscape/seascape), in which the protected landscape approach, linking the conservation of nature and culture, is grounded in experience (Brown 2015, 35). The study will try to find the answers to the following questions: what effect does the park have on the local people’s perception of their surroundings, who are the social actors in the process of ecotourism development, and what are the main resources and strategies? It is mainly based on ethnographic fieldwork conducted in the Podgorie region in the 2021–2022 period. Empirical materials were collected through in-depth interviews and informal conversations with representatives of the local authorities, cultural institutions, population and business, as well as with local and external eco-activists. Materials from the electronic media and social networks were also analyzed as an additional

source. The study also relies on my long-term ethnographic field researches on other topics and observations in the region, which allow us to follow the development of the processes.

Belasitsa: Nature

LOCATED IN southwestern Bulgaria, Belasitsa is a border mountain situated on the territory of three countries: Greece (about 45% of the mountain's area), the Republic of North Macedonia (about 35%) and Bulgaria (about 20%). It is both a climatic and a floristic border between the Mediterranean and the transitional continental region. The southern slopes of the mountain are rocky and sparsely afforested, while the northern slopes, on the Bulgarian side, are woody and cut by deep glens, rivers and streams forming small waterfalls. In the Bulgarian part of Belasitsa, about 1,500 plant species have been identified, of which 104 are of high conservation value (28 species are protected under the Law on Biological Diversity, 17 are included in the Red Book of Bulgaria, 53 are Balkan endemics, and 5 are Bulgarian). There are 31 plant species falling under the provisions of the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES), and 3 are subject to the European Directive on the Conservation of Natural Habitats and Wild Flora and Fauna. In recent decades, of particular interest have been the centuries-old chestnut forests, which are a rare habitat for Bulgaria and a priority for conservation. Regarding the fauna, on the Bulgarian territory of Belasitsa, about 800 species of invertebrates have been established, of which 178 are of conservation importance. Of the established 147 species of birds, 133 are protected according to the Law on Biological Diversity, 34 species are included in the Red Book of Bulgaria, 35 are part of Annex I of the European Directive on the Protection of Wild Birds, 2 species are globally threatened—the semicollared flycatcher (*Ficedula semitorquata*) and the European roller (*Coracias garrulus*)—, 139 species are included in Appendix II and III of the Berne Convention, 34 species are in the Bonn Convention for the Conservation of Migratory Animals and 22 species are part of the CITES Convention regulating wildlife trade. The number of mammal species that have been identified so far or for which there is a potential possibility to be present in the Bulgarian part of Belasitsa is 66. There are 14 conservation-significant species of small mammals and 7 medium and large mammals (Plan za upravlenie 2016).

The first steps to protect biodiversity in Belasitsa date back to 1988, when the Kongura Reserve was created, its aim being to preserve the natural for-

est ecosystems of common (sweet) chestnut (*Castanea sativa*) and European beech (*Fagus sylvatica*). Today, the mountain is part of the European ecological network “Natura 2000” (protected area under Directive 92/43/EEC for the conservation of natural habitats and wild flora and fauna). Since 2007, Belasitsa has been a nature park, within which are located the Kongura Reserve and the Babite Protected Area (declared in 2007, a buffer zone of the Kongura Reserve) (Plan za upravljenie 2016).

Belasitsa: Nature Park

ACCORDING TO the accounts of the park administration and local people, the initiative to declare Belasitsa a nature park belongs to the Bulgarian Biodiversity Foundation (BBF) and its members who are native to the region. The first steps towards this were taken in 2003, when the BBF started working on several projects aiming to introduce the local community to the biodiversity of Belasitsa and the need to protect it, as well as to the opportunities that the nature park would provide. Since nature conservation concerns only a small part of the people in the region, efforts were mainly aimed at convincing them of the economic benefits. An information campaign was held in each of the settlements in the Podgorie region. It is at this level that the initiative met one of the strongest resistances coming from the village administration, which, in defense of its personal interests, undertook an opposing campaign among the population. Under this influence, initially the local community in the various settlements of the Podgorie region met the idea of a nature park with the fear of a strict and restrictive regime. The purposeful awakening of the still fresh, for some rather traumatic, memory of a similar regime from the socialist period when the state border passing through Belasitsa was strictly guarded and the mountain was almost inaccessible, caused resistance among the local people. Intentions to declare Belasitsa a nature park also faced resistance from local businessmen and politicians whose interests were related to the mountain (hydro-electric power plant construction, logging). Trying to obstruct the procedure, they in turn played with people’s fears (restricted access to the mountain, shortage of firewood, etc.). After the BBF’s active work and information campaign and thanks to the participation of people from the local community, these fears were finally overcome. Ultimately, in order to bring the procedure to an end, some compromises were made, such as the exclusion of private properties from the boundaries of the nature park and the dropping of the ban on the construction of hydrotechnical facilities. Thus, by order of the Minister of Environment

and Water from 28 December 2007, Belasitsa became the latest nature park in Bulgaria. On 1 September 2008, the Directorate of Belasitsa Nature Park was established (its headquarters are located in the village of Kolarovo) which is responsible for the management of the park and is under the authority of the Executive Forestry Agency of the Ministry of Agriculture.

In most cases, the prohibition regime that is introduced with the declaration of a nature park does not have a direct negative impact on the traditional practices of the local population of the mountain area. Apart from livestock grazing, for which there are specially designated areas, the main resources used by the local population are timber, herbs, blueberries and chestnuts. The management plan of the park foresees a certain daily limit for picking chestnuts and blueberries for personal needs, and companies are issued special permits with a seasonal limit. The main problem that the Directorate faces are the abuses of the companies collecting chestnuts and blueberries for commercial purposes: exceeding the specified quote, uprooting, tearing off branches, polluting, etc. These abuses not only have a negative impact on nature in the mountains but they also injure the interests of the local people, as there is no resource left for them. At the same time, in recent years, the management of the park has registered an increased active use of forest fruits by the local population for economic purposes. All this necessitates the exercise of strict control over the use of resources, so as not to compromise their sustainability. Petrich State Forestry is responsible for the control over the picking of chestnuts, and the Regional Governor—for blueberries. Since the Regional Governor does not have employees in the field to carry out daily inspections, the Directorate of Belasitsa Nature Park has requested to be delegated the rights to issue permits for picking and to carry out inspections. Many of my respondents from the region see a solution to the problem of abuses and hence of their injured interests precisely in increased control.

According to the local people, a pressing problem in the last few years has been the shortage of firewood. The increased demand for firewood in neighboring Greece incentivizes the companies holding a logging permit in Belasitsa to export most of the wood, which in turn leads to a shortage on the local market. At the same time, the ongoing illegal logging, which has a negative impact on forest ecosystems, arouses dissatisfaction among local residents. According to a large proportion of my respondents, control authorities are more concerned with stalking and fining local people who cut down a tree on their own property than with preventing large-scale illegal logging.

Belasitsa: Tourism

IN THE process of establishing the nature park, the initiators tried not only to explain the idea of the park to the local residents but also to actively involve them in the implementation of a plan for the development of alternative forms of tourism. Within the framework of projects aimed at protecting biodiversity, but also at training in leadership and hospitality, the local residents have been introduced to the opportunities that the status of a nature park provides for the development of cultural tourism and ecotourism; they receive training, participate in various initiatives for exchanges of experience and are invited² to participate, with their specific skills and abilities (hotel management, mountain guiding, cooking, local crafts, herbalism, knowledge of local folklore, etc.), in a network of partners interested in the development of alternative forms of tourism. This was happening in a period (early 2000s) when the region was slowly starting to recover after the socialist period and the restrictions of the border zone, and the optimism of the local people made them think that they would be able to easily profit from everything. Promises of funding under European programs were also attractive to them. For this reason, many of the inhabitants of the region embraced the idea of getting involved in the tourism industry but only few of them managed to stay in it sustainably. Those who succeed, together with the management of the nature park and in cooperation with BBF, became the core that drives the development of ecotourism in the Podgorie region.

It is an interesting fact that the majority of local people who have stayed in the tourism business and are interested in and actively participate in the activities of the park are above middle age. In the beginning, young people did not lack enthusiasm but the clash between their ideas of quick financial gain and reality made them give up. It is especially difficult for those who want to open guesthouses. Despite hopes for European funding, in the end they have to rely entirely on personal investment.³ Such is the case of Rukie Izirova from the village of Yavornitsa and the Orchid Guesthouse. Together with two other women from the village, Rukie attended almost all the events organized within the information campaign for the establishment of Belasitsa Nature Park and took an active part in the training seminars and the initiatives for the exchange of experience. The initial idea to involve the family in the tourism business came from her son, who secured the financing and consigned to his mother his already registered company. Rukie started with a bar and two guest rooms and gradually extended her activities.

Belasitsa Nature Park is not only an initiator of the development of tourism in the Podgorie region but also an informal unifying center of all established

local businesses in the industry. The Directorate of the Park actively advertises not only the region as a tourist destination but also the individual businesses; it supports the organization of special tourist programs for large groups; initiates the inclusion of the Podgorie region in various networks (e.g., Slow Food); initiates or supports the holding of various festivals, exhibitions, workshops, and other events related to local nature, biodiversity, history, and culture. Despite the inevitable existence of discords⁴ among the tourism entrepreneurs, there is also a spirit of cooperation. They exchange experience, refer tourists to each other, jointly participate in the organization of special tourist programs for large groups and in promotion events of the Podgorie region, etc.

As a result of individual efforts and partnerships, the development of tourist infrastructure for ecotourism gradually began in the villages at the foot of Belasitsa Mountain. In addition to places to stay and eat, many tourist routes have been created on the territory of the park, starting from one of the villages in the foothills and reaching various natural attractions (peaks, localities, waterfalls, etc.). Some of these routes are thematic and, with the help of information boards, they introduce tourists to various aspects of the biodiversity on the territory of Belasitsa Mountain.⁵ The initiative and funding for most of the thematic routes comes from the administration of the park, but routes created on the initiative of local associations and with the efforts and financial support of local residents are also gradually appearing. Such an example is the “Route of King Samuel’s Warriors”⁶ which starts from the locality of Gorelite Barchini at the southern foot of the Ograzhden Mountain, crosses the Strumeshnitsa River, continues through the localities of Chukalako and Kufalnitsa, passes through the village of Klyuch and reaches the locality of Gergevche, above the village. It introduces tourists to the area where the Battle of Kleidion (also known as the Battle of Belasitsa) took place in 1014 and to key locations (according to history and local legends) related to it.⁷ The initiative belongs to the Young Mountaineer Association⁸ whose members, with the assistance of the park and with the help of local enthusiasts, cleared the area through which the route passes and placed markings, information boards and benches. Since 2014, when the 1000th anniversary of the Battle of Kleidion was celebrated, the Young Mountaineer Association in cooperation with the Petrich History Museum has organized an annual National Tourist March “In the Footsteps of King Samuel’s Warriors” during which the participants (students, tourist associations from all over the country, as well as individual participants and groups) travel along the thematic route. As part of the march, a charity fair is also organized, for which Denka Kimova, the owner of the Dynasty Complex in the village of Klyuch, and other women from the village prepare homemade meals at their own expense, display them on several tables in front of the complex and sell them, the collected mon-

ey being used to maintain the eco-trails above the village. The trails themselves were built on the initiative of the Dynasty Complex and a group of active local residents and were agreed with the administration of Belasitsa Nature Park. Although the tavern within the complex has existed for about 25 years, the guesthouse was built after the establishment of the park under the Program for the Development of Rural Areas. After tourists started coming to the complex, the owners were faced with the problem of where to direct the guests to spend their time. Then they decided to build eco-trails that would start from the village of Klyuch. Although at first most of the locals did not see the point of the work involved, they soon realized that the new routes attracted more and more tourists. In 2021, also on the initiative of the owners of the Dynasty Complex, the construction of a monument dedicated to King Samuel began in the village of Klyuch, a few meters away from the guesthouse and tavern. Due to the rejection of the bas-relief of King Samuel by the Ministry of Culture, a permit for the opening of the monument has not been received for the time being.

Apart from the historical heritage of the region and the long-established cultural memory of the local population associated with it, local residents are beginning to rediscover the potential of supposedly “unusual” and “sensational” events of the recent past for the development of ecotourism in the Podgorie region. For example, a curious route, built on the initiative of the Dynasty Complex, takes tourists to the locality of Manastircheto (Monastery). According to the local people, the place is highly energetic and they compare it to Rupite.⁹ It is believed that there was a monastery in the locality dedicated to St. George, which was destroyed by the Ottomans in the late 16th or early 17th century but its foundations still stand today. Although, according to the locals, there was no tradition for the villagers to celebrate St. George’s Day at this place, since 2020, the group of activists around Dynasty Complex have started gathering there for the holiday, inviting a priest as well. However, the area is also associated by local people with the UFO sightings over the village that became famous in the late 1980s and early 1990s.¹⁰ A cast resembling a four-leaf clover was made to mark the landing site of the unidentified objects. Because of it, among the locals, the locality is also known as Markata (the Mark). Although the wave of interest in the UFO phenomenon over the village of Klyuch has long since passed, the curiosity of some tourists has not gone unnoticed by the locals. Thus, the group of activists around Dynasty Complex decided to revive the memory of these events and make them part of the tourist attractions in the region. In 2020, the group of activists cleared the location, put up a cross, icons, tables, benches and information boards telling the history and legends related to the former monastery and the UFO sightings of the recent past. Although until recently many of the villagers treated these events with disdain, today more and more

people are willing to talk about them and some even “admit” that they were also eyewitnesses to the phenomenon. Parallels are drawn between the forms of UFO manifestation and local beliefs and legends, thus ascribing a primordial character to what happened in the recent past. The extraterrestrial beings seen by Kiril Yakimov, the most famous UFO observer in the village, are connected to the former inhabitants of the ancient city of Heraclea Sintica at the foot of Kozhuh Hill, described by the famous Bulgarian prophetess Baba Vanga.¹¹ All this, together with the sacred character of some localities in the area and with the cultural memory of King Samuel and the Battle of Kleidion, as well as the “natural uniqueness” of Belasitsa Mountain, is understood by many of the local people as proof of the strong energy of the mountain.

One of the main tourist strategies of the Directorate of Belasitsa Nature Park is related to the demonstration and offering of specific local dishes and produce. This is not accidental, as food is one of the most vivid reflections of local biodiversity and, as Hall and Sharples (2008, 6) point out, also one of the main tourist motivators. The Directorate and especially Sofia Kostadinova-Ilkova (chief expert for “Biological Diversity, International Activities and Projects,” Belasitsa Nature Park until 2022) conduct various initiatives to popularize the Podgorie region as a culinary destination. In 2019, the region became part of the organization Slow Food, aiming to strengthen local biodiversity, promote the local food and eating culture, and support small artisans. In 2013 and 2022, the Podgorie region (the village of Kolarovo) hosted the Terra Madre Belasitsa regional forum, organized by Slow Food Bulgaria in partnership with the Directorate of Belasitsa Nature Park and dedicated to local food and natural resources as the basis for a sustainable livelihood of local residents. The forum is attended by representatives of the three countries—Bulgaria, Greece and North Macedonia, on whose territory the Belasitsa Mountain stretches. The program includes a conference, workshops, exhibitions, visits to tourist routes and historical-ethnographic collections, bazaars of local products, the demonstration and tasting of local dishes, folklore programs, etc.

In the last three decades, the chestnut has gradually developed as one of the symbols of the Podgorie region: in 1992, the Golden Chestnut music festival was launched in Petrich; the chestnut is a main element in the logo of Belasitsa Nature Park; it underpins a large part of the tourist products (thematic routes, excursions for picking and roasting chestnuts, chestnut dishes, etc.); since 2012 the Directorate of the Park in partnership with the Municipality of Petrich and with the assistance of the BBF, Petrich History Museum, various associations, community centers and the circle of local activists began organizing the annual Chestnut Festival which takes place in October in the village of Kolarovo. In addition to the main element of the festival—the chestnut—the eight villages in

the Podgorie region present typical dishes, handicraft products and local folklore. Thematic exhibitions and visits to routes in the mountain are organized, and at their stand the BBF and the Young Mountaineer Association jointly offer activities for children through which they are introduced to nature and its preservation. It is noteworthy that food stands out in the varied program of the festival. Among the active collaborators of the park, there is a circle of women who “specialize” in the presentation of typical dishes of the region and demonstrate their preparation in various forums, in tourist and culinary shows and for tourist groups. There are mainly six dishes presented as typical: *sarmi* (stuffed leaves) made with leaves of American pokeweed (*Phytolacca Americana*), *meslnik* (a doughy dish with stewed cabbage), *rakarnik* (rice with crayfish caught in the local ravines; traditionally served on St. Theodore’s Day), *loone* (stew made of the young leaf tips of the pumpkin plant), *plyaska* (baked dish with an edible green plant) and *krajsbnik* (dough dish with a hole left in the middle and filled with fried fish or stew and served mainly on special occasions). Although chestnuts in the region are traditionally eaten boiled or roasted, a variety of specialties from world cuisine are presented at the festival.

Thus, the creation of Belasitsa Nature Park, the development of ecotourism in Podgorie region and the transformation of the demonstration and offering of specific local food and products into one of the main tourist strategies give a strong impetus to the process of constructing a local food identity in the region and the promotion of certain food products and dishes as authentic and unique to the region (see Amilien 2005). Through the dedication of public celebrations to dishes that tie it to a given community and territory, food receives its cultural valorization and becomes symbolic capital (see Ganeva-Raycheva et al. 2021; Stoilova 2021). Of course, this is also part of the reverse process, where food serves as a marker in the construction of local identity. In this sense, culinary events are strongly linked to a sense of place and community pride in the products produced (Hall and Sharples 2008, 5). It is no coincidence that the policies of identifying certain dishes as typical of Podgorie region have led to disputes between the particular settlements as to which one is the authentic place of origin.

Conclusion

IN LIGHT of the new nature conservation approach, the efforts of the competent authorities to convince the local population of the importance and benefits of the protected status of their environment usually include the cultural heritage. In accordance with this and being aware of the fact that few of the local residents had embraced the idea of protecting nature and biodiversity

on Belasitsa Mountain, even with their explanatory campaign, the initiators of the creation of Belasitsa Nature Park set a specific direction for the perception of the surrounding environment—through the prism of economic benefits and cultural heritage, and one specific strategy—the development of ecotourism. Belasitsa has a significant cultural value for the inhabitants of the submontane villages in Podgorie region: from the use of natural resources, through the cultural memory of King Samuel and the Battle of Kleidion and the sacred topoi, to the role of the mountain as an inaccessible border separating the socialist from the Western world. The status of a protected area gives local residents (or an increasingly large part of them) a new perspective on the relationship between their surroundings and their cultural and historical heritage. On the one hand, they are becoming more and more aware of the interrelationship between nature and culture, and on the other hand, they understand that the preservation of one is inextricably linked to the preservation of the other. The direction set by the park, with nature and the cultural and historical heritage seen as resources for the development of ecotourism in the region, leads to a rethinking of this heritage: new forms of interpretation of established cultural valuables (such as the cultural memory of King Samuel and the Battle of Kleidion) and the creation of new ones (such as the chestnut, traditional dishes, and the UFO phenomenon).

If we look at the social actors, it is clear that the main role in these processes is played by a group of local people, as well as by some local associations, united by the Directorate of Belasitsa Nature Park. In this sense, this is an example of a bottom-up initiative (although, as we saw, the park has an institutional character, in some cases it only sanctions the initiatives of local residents). This is not surprising, considering that the greatest resistance to the establishment of Belasitsa Nature Park came from the local authorities. In the Environmental Protection Program 2020–2024 (Programa 2020) the Municipality of Petrich links the preservation and maintenance of protected areas and biological diversity to the creation of conditions for the development of ecotourism in the municipality, and in the Municipal Development Plan of the Municipality of Petrich for 2014—2020 (Obshtinski plan 2014) the integration of all cultural-historical and natural sights into the framework of the general tourist offer is foreseen. However, the goals and activities in both documents are formulated very generally and to a large extent contradict the actual action/inaction of the Municipality. In fact, the involvement of the local authority in the various initiatives always takes place at a later stage and has a rather representative character.

□

Notes

1. Podgorie is a geographical area in the northern foothills of Belasitsa Mountain, falling on the territories of Bulgaria and North Macedonia. On the Bulgarian side, eight villages are located in the Podgorie region, which administratively come under the Municipality of Petrich: Belasitsa, Kolarovo, Samuilovo, Kamena, Yavornitsa, Klyuch, Skrat, and Gabrene.
2. Questionnaires are distributed among the residents of each village of the Podgorie region, in which everyone can indicate with what skills and services they could be involved in the development of tourism in the region.
3. With regard to European financing, the only exception is the Dynasty Complex (guesthouse and tavern) in the village of Klyuch, the guesthouse being built under the Program for the Development of Rural Areas.
4. Discords often arise regarding the “ownership” of a given cultural element—contestation of its “traditional” presence in the local culture of a certain village of the Podgorie region and hence of the “right” and “knowledge” of representatives of that village to present it to tourists. These disputes arise from the fact that the village of Gabrene is the only one of the villages in the Podgorie region that retains its old population, while in the rest the inhabitants are mainly descendants of immigrants from Aegean Macedonia and the high mountainous villages on Ograzhden Mountain.
5. Examples of such routes are: “Butterflies and Flowers of Belasitsa,” “The Life of the Chestnut,” “The Path of the Ant,” “Friends” (introduces tourists to the unknown and unique world of trees), “The Secrets of Water,” “Flower Fairy Tale” (introduces tourists to the flowers in the sycamore forests of Belasitsa Mountain), “Woodpeckers.”
6. Samuel was king of the First Bulgarian Kingdom from 997 to 1014. His rule was characterized by the struggle to preserve Bulgaria’s independence from the Byzantine Empire and thus by constant warfare. Today, the rule of King Samuel is mainly related to the famous Battle of Kleidion, which took place on 29 July 1014 between the Byzantine Empire and the Bulgarian Kingdom. It was the culmination of nearly a half-century of struggle between the two countries. The result was a decisive Byzantine victory. The battle took place in the valley between the mountains of Belasitsa and Ograzhden, near the modern Bulgarian village of Klyuch. The decisive encounter occurred on 29 July with an attack in the rear by a force under the Byzantine General Nikephoros Xiphias, who had infiltrated the Bulgarian positions. The ensuing battle was a major defeat for the Bulgarians. The Bulgarian soldiers were captured and reputedly blinded by order of Emperor Basil II, who would subsequently be known as the “Bulgar-Slayer.” King Samuel survived the battle but died two months later from a heart attack, reportedly brought on by the sight of his blind soldiers. The heirs of Samuel could not subsequently hold off the Byzantine advance and in 1018 the Bulgarian Kingdom was finally destroyed by Basil II.
7. For more about these and other localities in the region linked by the local cultural memory to King Samuel and the Battle of Kleidion, see Periklieva and Markov 2016.

8. The Young Mountaineer is an association from the town of Petrich whose goal is to popularize tourism and mountaineering among children and the youth. The association actively participates in many of the events organized by Belasitsa Nature Park.
9. Rupite is a locality in southwest Bulgaria. It is located on the right bank of the Struma River, some 10 km from the town of Petrich, on the territory of the village of Rupite. Rupite has a multi-layered character of great natural, ecological, historical, cultural and religious significance. First and foremost, Rupite is invariably associated with the famous prophetess Baba Vanga. She was born on 3 October 1911 in Strumica, in today's Republic of North Macedonia. A turning point in her life occurred when a 'tornado' allegedly lifted her into the air and threw her into a nearby field. The accident resulted in a gradual loss of sight and the acquisition of abilities of clairvoyance. In 1942, Vanga married Dimitar Gushterov from Petrich, Bulgaria, and moved to live with him there. Soon after that she became well known and her house in the town of Petrich turned into a popular destination for a great number of people from across the country and even from abroad who sought her help. Vanga considered Rupite very special, sacred and energetic and she went often there to relax and energize. In 1994, she built in Rupite the St. Petka of Bulgaria church, next to which she was laid to rest two years later. Gradually, an entire complex emerged around the church and Rupite became a famous religious and pilgrimage destination.
10. According to local residents, UFO sightings date back to the 1960s but the village became popular in this regard in the late 1980s and early 1990s when local resident Kiril Yakimov became famous in the media not only as a regular observer of unidentified light phenomena in the region of the village of Klyuch but also as a contactee of extraterrestrial beings. The numerous testimonies of local people about UFOs attracted the attention of the media and a television crew of the Bulgarian National Television filmed a documentary about the phenomenon ("Flying Saucers over the Village of Klyuch," 1987—see <https://www.youtube.com/watch?v=INK-f4K9i-Q>, accessed 18 June 2023).
11. Heraclea Sintica is an ancient settlement located in the area of Rupite, which arose at the end of the 4th century BC in the Sintian tribal areas. During the time of Philip V (221–179 BC), Heraclea Sintica was permanently included within the Macedonian Kingdom until it was conquered by the Romans in 167 BC. The settlement probably ceased to exist sometime around the 6th century AD after raids by the Slavs (Mitrev 2005). Allegedly, Vanga used to tell a lot of stories about the ancient city in Rupite. She described the inhabitants as very tall and large people in resplendent clothes, unusually enlightened and religious.

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Abstract

Belasitsa Nature Park, Bulgaria: A New Perspective on the Nature–Culture Relationship and Rethinking Cultural Heritage in Podgorie Region

The study examines the nature–culture interrelationship by focusing on the process of ecotourism development in the Podgorie region in the context of the establishment of Belasitsa Nature Park, Bulgaria. It will try to find the answers to the following questions: what effect does the park have on the local people’s perception of their surroundings, who are the social actors in the process of ecotourism development, and what are the main resources and strategies? In accordance with the *protected landscape approach*, linking the conservation of nature and culture, and being aware of the fact that few of the local residents recognize the idea of protecting nature and biodiversity, the initiators of the creation of the park set a specific direction for perceiving the surrounding environment—through the prism of economic benefits and cultural heritage—and one specific strategy, the development of ecotourism. As a result, the local residents acquire a new perspective on the relationship between their surroundings and their cultural and historical heritage.

Keywords

nature conservation, cultural heritage, nature park, ecotourism, Bulgaria

Counterurbanites As Drivers of Innovation and Local Transformation A Case Study from Coastal Dobrudzha, Bulgaria

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The focal point of the text are the various economic and social entrepreneurship activities that have been developed in the last fifteen years by newcomers (people with and without ancestral connections to the village).

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Introduction

IN LATE August 2020, the two of us, with a group of friends, headed to the north Black Sea coast of Bulgaria, to pitch tent for a few days. We had chosen the vicinity of the village of Ezerets, located in a rural area on the very northeast edge of the country, past the big seaside resorts. We had visited the place for the first time nine years earlier. At that time, in 2011, the settlement was quiet and not so well-maintained, and the pine forest along the coastline, two kilometers from the village, was a peaceful and scarcely visited place. When entering the village in 2020, however, our

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attention was immediately caught by the dozens of vehicles with plates from other districts in Bulgaria and from Romania. The village square was filled with people of different ages. Unexpectedly, we found ourselves at a three-day event with an ecological, cultural and social focus, whose organizers were locals and newcomers from cities all over the country and abroad. Little did we know that the experience we had then, and our acquaintance with some of the people we met on this event, would be essential for our ethnographic research interests in the area in the years to come. It was during this event that we began to appreciate the significance of counterurbanization and its potential implications for the changing landscape of the village.

This article examines the intricate processes of economic, social, and cultural transformations of the village of Ezerets. The main drivers of these are a number of entrepreneurial initiatives by urban settlers (with and without family ties to the village). Furthermore, we are interested in how these changes impact the rural landscape and shape the use of existing local settings, assets, and resources. We aim to see whether and how these newcomers have not only contributed to the local economy, job opportunities, and infrastructure development, but also how their activities have influenced the social dynamics of the village.

First, we briefly discuss the key terms, theoretical concepts, and the methodological framing our study. Second, in order to contextualize the remoteness of Ezerets, we present the economic and demographic processes in the village during the last decades. These processes have set the direction of the socio-economic development of the settlement in recent years and also contextualize the role of the newly-developing counterurbanization processes in the region. The focal point of the text are the various economic and social entrepreneurship activities that have been developed in the last fifteen years by newcomers (people with and without ancestral connections to the village). They are the drivers of a number of sociocultural, economic, and landscape transformations of the settlement.

Theoretical Framework

Remote Rural Areas and the Concept of Remoteness

ETYMOLOGICALLY, THE word “remote” derives from Latin—it is rooted in *remotus*, the past participle of *removere* (“to remove”). A remote rural area is characterized as being distant from big urban (political and administrative) centers, and it “exhibits itself as a geographic inconvenience in accessing urban resources” (Chi and Marcouiller 2013, 22). In the European Union, remote rural areas are spatially defined for the needs of regional

policymaking: the region is considered remote if less than half of its population can reach a city of at least 50,000 inhabitants within 45 minutes (Dijkstra and Poelman 2008, 3). Additionally, such regions are characterized by low population density, a large share of elderly people, poor employment opportunities, poor infrastructure, and a lack of public and private services resulting in economic lagging (Bertolini, Montanari, and Peragine 2008, 7–9). These definitions are based on a formal geographical approach.

Without detaching remote from its geographical sense, from an anthropological point of view, the concept of remoteness is determined not only by topography but also by a topology that is expressed in a cultural vocabulary (Ardener 2012, 523). It is a relational category influenced by various socio-cultural processes—remoteness must be understood in relation to historical, political, and economic structural conditions and to how people perceive, (re) produce, and challenge their position within the frames of dynamic fields of power, being thus not static but “always being made, unmade and transformed” (Harms et al. 2014, 362–365). This proposition allows for the conceptualization of remote rural areas not simply as disconnected but as “shot through with uneven forms of connectivity” (Saxer and Andersson 2019, 143). They are tied in a specific way to regional, national, and international politics, economy, and culture. Thus, “remoteness and connectivity condition each other and result in shifting socio-spatial constellations” (ibid., 147). Remoteness should be examined in the context of embedded histories and, as Martin Saxer points out, it “is not only a relational condition, but in many places also a relatively recent one” (Saxer 2016, 110). Socio-political change or economic crisis, or even ecological disaster may reinforce the perception of a place being remote as a result of some disconnections which have arisen.

Counterurbanization and Rural Entrepreneurship

MANY RESEARCHERS view “true” counterurbanization as a movement to remote and peripheral areas, located beyond metropolitan influence, excluding the processes of suburbanization and peri-urbanization (Dean 1986, 151; Champion 1989, 32; Coombes, Dalla Longa, and Raybould 1989, 9), which “rather represent[s] restructuring within the urban system and its hierarchy of settlements” (Jones et al. 1984, 437).¹ Typically, newcomers to remote rural areas are described as anti-urbanites, and are driven by a rejection of the urban way of life. They endeavor “to escape crime, taxes, congestion, and pollution” (Mitchell 2004, 24). The anti-urbanites are driven by a lifestyle motivation, but their wish is to not only reside outside the

city, but also to work in a rural environment, making a completely new life for themselves. Elaborating on Mitchell's classification, Šimon (2014, 132–135) adds one more type—the rural entrepreneur. These counterurbanites see the environmental and social amenities associated with rural areas as an appropriate setting for business activities. Our previous study (Pileva and Markov 2023) indicates that even people who moved in search of a lifestyle change, in the course of time, influenced by various new conditions and factors in their rural life, changed their perceptions and priorities and eventually started their entrepreneurial projects.

In this respect, there are plenty of studies that provide evidence that rural in-migrants could play an important role in fostering the rural economy and local development, by establishing new businesses, and thus diversifying the rural economy, which is traditionally connected with agriculture (Stockdale 2006; Bosworth 2008; Bosworth 2010; Mitchell and Madden 2014). Kalantaridis and Bika (2006, 109) claim that “these new arrivals are relatively affluent individuals equipped with distinct attributes and networks of contacts.” Similarly, Bosworth and Atterton (2012, 267) look at the rural in-migrants as having “considerable potential to play a powerful transformative role in reshaping the nature and extent of the links and flows between rural areas and the regional, national, and global economies around them.” The indirect effects and benefits for the local community, deriving from the establishment and development of a business, such as the creation of social networks, the accumulation of social capital, etc., are also important for the analysis of the current text.

In contrast to commercial entrepreneurship, “social entrepreneurship refers to the identification, evaluation, and exploitation of opportunities that result in social value,” rather than personal economic profit (Certo and Miller 2008, 268). A social entrepreneur recognizes and addresses existing social needs and problems in a given community. By applying business practices and market-based skills to organize an enterprise or introduce a novel service, they aim at social change and at community capacity-building. Economic development is an adjunct rather than a primary focus (Steinerowski et al. 2008). It is worth noting that the two types of entrepreneurship are often intertwined.

For a better understanding of the entrepreneurship activities of newcomers in connection to rural development, in our analysis, we apply the so-called neoendogenous approach (Bosworth and Atterton 2012). It focuses on the interface between endogenous and exogenous factors. On the one hand, it recognizes that local embeddedness, connections to a region's culture, history, and environment, is crucial for the success of a given activity, especially in remote regions (Martynovich 2017, 743). Local embeddedness signifies the need for individuals' integration within the local environment, and emphasizes the importance of

establishing their business and social ventures upon existing local settings, assets and resources (endogenous factors). On the other hand, in-migrants bring with them valuable social capital and expertise. Due to their connections to wider social networks, infrastructures and markets, they have access to tangible and intangible extra-local resources and knowledge (exogenous factors) that are not otherwise present within the given rural community (Bosworth and Atterton 2012, 263).

Methodology

THE CURRENT text is a result of an ethnographic study of counterurbanization processes among Bulgarian and foreign citizens in Bulgaria. It has been conducted within the scope of the ongoing research project “The Neighbor from Sofia, the New Villager from Germany: Counterurbanization, Socio-Cultural Interactions and Local Transformations.” Although work on the project started in late 2022, we have previous observations on counterurban, economic, and socio-cultural processes in the village of Ezerets and the region, dating back to 2011. We have been visiting the settlement (a couple of times a year) since the summer of 2020. In 2023 alone, we visited the village four times—at the beginning of March, at the beginning of May, in late July, and at the end of August. We planned our visits so that we could attend certain events and observe specific processes. Our first two visits were meant to observe two village celebrations, organized by the local community center with the active participation of locals and counterurbanites. However, because of the focus of the current text, we do not pay specific attention to these two particular events. Our third visit took place at the height of the summer season, and the last one was at the end of it. This allowed us to observe various economic and recreational activities, as well as social engagements among permanent and seasonal residents, tourists, entrepreneurs, and authorities.

During our fieldwork, we conducted dozens of semi-structured interviews and informal conversations with locals and counterurbanites, village guests and administration representatives. With each group of interlocutors, we discussed specific sets of research problems. Some were carefully curated for the profile of the respective interlocutors, but most were recurring throughout all conversations. With elderly residents who were born, raised, and have been (mostly) residing in the village, we discussed local livelihood activities of the past and the ways in which the landscape of the settlement has been changing over the years. At the core of our conversations with newcomers were the motivations for counterurbanization, the reasons for choosing a village in a remote rural

area, business activities (ideas, conditions and setbacks), cultural initiatives, the interaction with locals and other newcomers, including other entrepreneurs, etc. The main topic of our conversations with the mayor of Ezerets were local economic and socio-cultural developments, including population change, the real estate market, tourism services, and landscape transformations. Talking to different actors allowed us to obtain information from various perspectives, as well as to cross-check data regarding local processes.

Ezerets: Economic Data

THE VILLAGE of Ezerets is located on the seaside part of the historical-geographic region of Southern Dobrudzha, about 2 km from the Black Sea coast (see map). Administratively, the settlement is one of the 15 villages within the Shabla Municipality (the municipal center is about 7 km away). It is within the limits of the district of Dobrich (the district center is 76 km away).² The village is also located about 87 km from the neighboring district city of Varna, the biggest settlement in Northeast Bulgaria.³ Ezerets stands 22 km from the border with Romania (the Durankulak—Vama Veche border crossing point). This proximity has had a significant impact on certain economic processes in the village and the region in general in recent years.



Shabla Municipality is a rural area; agriculture is traditionally the most developed industry, as around 85% of the municipality's land is arable (Plan za upravljenie 2003, 40).⁴ The proximity of the village to Lake Shabla-Ezerets (3 km) made fishing and crab-catching essential local livelihood practices between the 1950s and 1980s (ibid., 56). Since the beginning of the 1970s, after the construction of a government residence on the lake shore, and the access restrictions introduced, industrial fishing was made difficult, but the practice remained important in the region. In the 1990s, a significant decline in the lake's fish population was registered, due to no artificial restocking between 1985 and 2000. In the new millennium, this practice was revived by the responsible authorities, albeit sporadically (ibid., 37).⁵ Since 2004, the catching of crabs and fishing have been regulated by the Lake Shabla Protected Site Management Plan. The greatest obstacle for fishing activities is considered the swamping of the lake (ibid., 48–49). Today, amateur fishermen are rarely found in the village, and poaching is flourishing, according to locals and some representatives of the Varna Regional Environment and Water Inspection Agency.

Vegetable production has an especially important place within the local economy. In order to maintain the plantations (vegetables, orchards, and vines) near the lake, in the 1970s, a large-scale irrigation system was built. Grain, alfalfa and forage corn, as well as tobacco, were also grown. Since the beginning of the 1990s, vegetable production in the area in the immediate vicinity of the lake has gradually, but permanently, been replaced by non-irrigated crops (corn, wheat, and sunflower). In the second half of the 2010s, the cultivation of oil plants (lavender and canola) was common in the area (and the entire northeastern part of the country). As of today, the majority of the arable land of the village is held by large tenants. Only three small local farmers are registered (Letopisna kniga 2023, 4). A similar decline in smallholder farming is seen in the livestock sector as well. Until the end of the 1990s, most families raised sheep, pigs, and poultry. At the beginning of the 21st century, cows and goats (a couple of dozen), and sheep (a few hundreds) were raised on small farms in the village (Plan za upravljenie 2003, 36). In 2020, there were only two cattle farms, and two residents raised a dozen goats and sheep. Difficulties in agriculture caused by general risks, financing problems, unfair competition, workforce shortages, and the permanent consolidation of the sector, lead to the disappearance of small farmers. This process also affected the demographics of the region, which deepened its peripherality.

Over the last decade, tourism has become one of the leading industries in the economy of Shabla Municipality. Between 2016 and 2020, there was a significant and stable increase in tourist visits in the entire municipality. The number of registered overnight stays in 2019 was 24.7% higher than in 2016.

However, in the following two years, coinciding with the COVID-19 pandemic, the gradual increase remained present. Thus, in 2020, the registered overnight stays were 33.6% more than in 2016, and in 2021—17.2% more than in 2020. The increase is registered even though, in 2020, probably due to the pandemic, there was a 36% drop in foreign tourists (Programa okolna sreda 2015, 24, 26).⁶ Following the growing interest, more accommodation places were established within the same period. In 2014, there were 100, in 2020—154, and at the beginning of 2023—193. As of the latter, according to the National Tourist Register, 67 are categorized as guesthouses, and 97 as offering guest rooms/apartments.⁷ However, the municipality remains unaffected by large-scale coastal resort constructions. Essentially, the presence of two protected areas along the coast in the Shabla Municipality—Lake Durankulak and Lake Shabla, as well as the military base on the Black Sea coast, south of Lake Shabla-Ezerets, are the greatest obstacles for big resort constructions in the area. As of 2023, only four hotels and guesthouses are registered in the municipality, and the biggest of them can house up to 78 people. This, in fact, prevents the commercialization of the area, maintaining its rural and closer-to-nature image, while at the same time making the area insufficiently competitive with the resorts south of Varna. Camping, however, is widespread (as of 2023, 17 campsites and bungalow sites have been registered⁸). In general, the area north of Shabla (Ezerets, Krapets, and Durankulak) is well-known among Bulgarians and Romanians for its wild camping⁹ possibilities.

Demographics

THE FORCED modernization and industrialization under the socialist regime (1944–1989) marked the beginning of the depopulation of rural areas in Bulgaria. Ezerets, being a small settlement, has been inevitably affected by these negative demographic processes. The urbanization of the country in the socialist period reached its peak between 1950 and 1985. For a few decades, the ratio between the rural and the urban population significantly changed: in 1946 it was 75.3% rural against 24.7% urban, and in 1985—35.2% rural against 64.8% urban (National Statistical Institute 2020, 58). In the 1990s (1993–2001), the tendency seemed to reverse—out of all internal movements in the country, 15.6% were village-city migrants, and city-village migrants were nearly twice as many—27.9% (Shishmanova 2014, 93). This coincided with the period of land restitution (see Kozhuharova-Zhivkova 1996, 19–21). Therefore, the counterurbanization was filled with hopes for a revival of agriculture

and agricultural areas in general. However, the process was not as stable as expected. Due to financial and production difficulties in agriculture, many of the in-migrants consequently went back to towns and cities, and those who stayed in villages were mostly retirees. In this respect, between 2002 and 2011, the share of urban-rural migrations considerably decreased (data from the National Statistical Institute).

Over the last decade, despite the continuing negative demographic processes in the country and the rural population decline in general, among urban populations (in active, pre-retirement and retirement age) there has been a growing interest in counterurbanization (see fig. 1).¹⁰ The peak was reached during the COVID-19 pandemic in 2020, when many moved to villages in search of more solitude and freedom from the various restrictions imposed in urban areas, in an attempt to deal with the crisis.¹¹ Then the city-village migrants were more than three times as many as those going in the opposite direction (95,510 against 30,108). In the following two years, the number of movements in both directions was relatively equal, with a slight predominance of those from villages to cities (data from National Statistical Institute).

According to the last five national censuses, since 1985, the population in Ezerets has been steadily declining, due to ageing and the outflow of people of active age to cities in the country and abroad. In 35 years, the population of the settlement has decreased by more than 1/3 (see fig. 2).

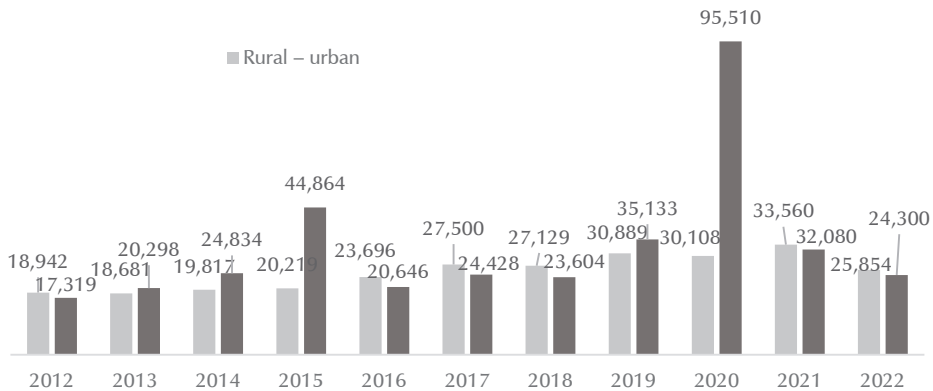


FIG. 1. INTERNAL RURAL-URBAN AND URBAN-RURAL MOVEMENTS IN BULGARIA
SOURCE: National Statistical Institute.

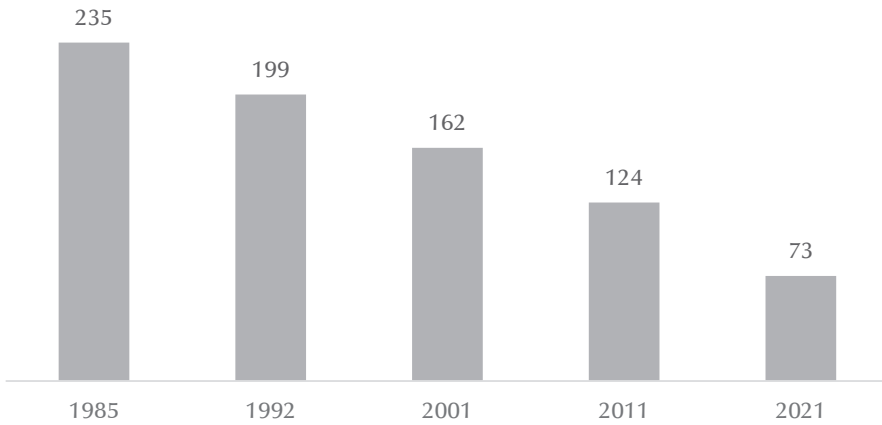


FIG. 2. POPULATION OF EZERETS ACCORDING TO THE NATIONAL CENSUSES DATA
SOURCE: National Statistical Institute.

From 145 people with current addresses in the village in 2011, the population decreased to 109 in 2019.¹² In the last three years, however, a steady process of mechanical population growth has been taking place (see fig. 3). The village's coastal location and the natural features and rural landscape are recognized as the biggest assets of Ezerets. As we have stated elsewhere,¹³ overcrowding and air and noise pollution are the core push factors from urban areas, as the notion of the village as a quieter, cleaner and greener “escape” from the urban “madness” is a pull factor to rural areas. Thus, as of 15 June 2023, residents in Ezerets with current address registration numbered 132. Of them, 52 have both permanent and current addresses and 75—only current.

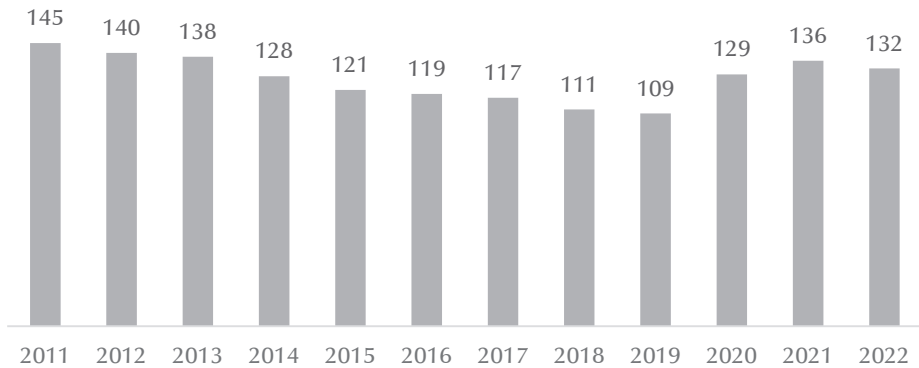


FIG. 3. POPULATION CHANGE IN EZERETS DURING THE PERIOD 2011–2022
SOURCE: Civil Registration and Administrative Services.

The newcomers are people from big towns and cities in the country (mostly Varna, Sofia, and Dobrich). Some inherited their houses, others buy properties as second or vacation homes or/and investment properties. There are also a few foreigners, who settled permanently in the village (from France and Belarus) or live there seasonally (from Slovakia and Poland). According to the mayor of Ezerets, in 2022, the village issued the most permits for construction and reconstruction in the entire municipality. The newcomers are considered peculiar drivers of change, bringing with them new social and financial capital and ideas, transforming the socio-cultural environment, economy, and the landscape of the village.

Economic and Social Enterprises

AS STATED previously, the so-called wild camping is among the most recognizable recreation activities in the region. Since the beginning of the 2010s, the beach near Ezerets has been gaining popularity among wild camping enthusiasts in the country. There is a small pine forest along the beach, which has been used as an unregulated peculiar bivouac. In the summer of 2011, when we visited the place for the first time, there were just a couple of tents pitched there. The vegetation among the pine trees was densely overgrown, offering privacy to the campers. In the last decade, however, the growing interest in wild camping in the municipality prompted the local authorities to establish some regulations. Therefore, in 2015, Shabla Municipality designated four places along the coast as areas for pitching tents and parking campers and caravans for a minimal municipal daily fee.¹⁴ Among those peculiar campsites was the pine forest near Ezerets. In the following years, the landscape changed. The low vegetation was regularly removed by the authorities, and a few general waste containers and mobile eco-toilets were placed. The new amenities were welcomed by campers, beachgoers and local residents, in the hope that the area would be kept clean and well-preserved.

The purposeful policy of the municipality in the previous years and the growing interest among the population in the country in more peaceful and non-urbanized places on the coastline have been gradually attracting more visitors to the northeastern part of the country, and the area of Ezerets is no exception. This especially during the COVID-19 pandemic in 2020, when physical distancing was basic social behavior.

In the summer of 2020, ironically opposed to the sought-after seclusion, the bivouac was crowded. There were tents, campers and caravans from all over Bulgaria and Romania, densely packed among the pine trees. Long-term camp-

ers fenced out “yard” spaces, often decorated with seashells and beach stones. Many had electric generators, mobile showers, and TVs. In the last few years, there have even been a couple of caravans present on site the entire year, “reserving” their preferred places.

In the last couple of years, there were many campers, especially in 2020, because of Corona. Romanians, Romanians, Romanians, Bulgarians—many. They pitch tents in the grove. Friday, Saturday, and Sunday it is full. There are also two bars... (Peter, mid-60s)

There had never been so many people in the bivouac as back then [the summer of 2020], it was unheard of. (Helen, early 40s)

In June 2019, the National Assembly started a procedure for regulating wild camping sites. As a result, the next year, Shabla Municipality stopped maintaining the bivouacs, waiting for the regulations. The discussions, however, caused a number of conflicts among various ministries, as well as dissatisfaction among various groups of the population. To this day, after four years, no consensus has been reached.¹⁵ Nevertheless, the enormous popularity the place gained among wild camping enthusiasts continues to attract dozens of holidaymakers, not only during the weekends, and not only from Bulgaria.

Even though the pandemic gave a new push to the tourism industry in the village, the peculiar foundations of the development of tourist services were laid in the previous decade. The various business initiatives have been gradually transforming the settlement. There is a hotel complex with a restaurant,¹⁶ a swimming pool and a small zoo with a variety of bird species called “The Wild Duck.” The name refers to the most popular bird species in Lake Ezerets. It was opened more than 15 years ago by Rado and his wife Kremena, both in their mid-40s. They were born in the village and have been residing in Varna most of their adult lives. However, they have never severed their connection with Ezerets. The couple has family who live in the settlement and Rado is an avid hunter and fisherman, pursuing his hobbies in the area. Having hereditary money, as well as finances from agriculture (being in the industry since the early 2000s), they established the complex on an inherited plot and a couple of neighboring ones, which they bought for this purpose.

We divide our time between here and Varna. In the summer, we are mostly here. We need to get the job done. My mother is here [in the complex] all the time, she works in the kitchen sometimes,

says Kremena.

The complex set an obvious landscape change in the village—it was built in the so-called Bulgarian Renaissance architectural style, resembling stone buildings with wooden posts, and verandas with wooden elements. The outdoor areas and numerous paths around the yard are paved with stones, and there are massive wooden tables and benches. This architectural style, although popular among restaurants offering “traditional” Balkan/Bulgarian cuisine, is not typical for Northeast Bulgaria and the seaside area in particular, but rather for the Balkan mountains. In the interior, there are hunting trophies and folk pieces (cloths and items of clothing, antique utensils, etc.). Because of the food and the overall atmosphere, over the years, the restaurant gained popularity all over the Dobrich and Varna districts, as well as among regular tourists in the vicinity, from the country and from Romania. “My mother praises the place; she loves visiting it whenever she comes to Bulgaria. I, on the other hand, am not a fan of the place,” claims Klaudia from Poland, whose extended family owns a few properties in the nearby village of Granichar, using them as vacation homes. The owners of the complex are one of the few in the tourism industry in the settlement that employ people from outside Ezerets, including people with disabilities. Over the years, however, their competition has been gradually growing.

In 2003, Zheni and her husband Emo, both in their early fifties, with no ancestral connection to Ezerets, decided to move to the village in search of lifestyle change. They used to work in nightclubs in Varna and were looking for a rural occupation away from the city noise and hectic way of life. “We used to visit friends in the village. My husband used to hunt for ducks here in the winter,” said Zheni. After the birth of their second son, the family settled down in the village, first living in a rented house. For about 10 years the couple worked in agriculture, growing peppers and employing field workers from the region. After experiencing financial difficulties, they decided to terminate their agricultural activities and, in 2016, they built three bungalows on the property they already owned. Their new business venture was motivated by the number of tourists in the region, and the village in particular, which was gradually increasing at the time. However, being a guesthouse keeper is not their main occupation. In summer 2015, Zheni and Emo became tenants of the village grocery shop with a pub. The couple have been running it alone, with the occasional help of their sons in the summer. Being in daily contact with local residents and tourists, the family became important figures in the social life of the settlement. Until recently, their small shop was the only one in Ezerets, “[In winter] I work half a day, or a couple of hours a day, so [people can buy] most of the necessary things,” says Zheni. The pub has been the favorite place for social gatherings, both for locals throughout the year, and for the new residents of the village in the summer.

Coming to the village for personal reasons rather than business aspirations is common for most of the entrepreneurs we met. Tanya (late 60s) first came to Ezerets in 1995 looking for cheap property in which to invest her savings: “I came here because it is wild [not urbanized],” she claims. So, she bought a single-story house with three rooms that was built in the 1950s–1960s with an adjacent small stone outbuilding from the end of the 19th century. In the following twenty years, Tanya’s family visited the place for a couple of weeks a year on their summer holidays without renovating anything on the property. With her husband and her own retirement approaching, and seeing the potential of the settlement, they started a three years-long renovation. From the beginning, they had in mind renting the place out to tourists. For that purpose, they built three ensuite rooms, embedding the remnants of the stone walls of the fallen adjacent outbuilding, and built a separate veranda for the visitors. After retiring, Tanya, who had been renting out short-term flats in Sofia since the mid–1990s, decided to develop the guesthouse in Ezerets for a couple of years and then leave it to her son. They opened for business in June 2021, when Tanya and her husband moved onto the property. The interior features a mixture of furniture they brought from the flats in Sofia, making the overall atmosphere homely. After her husband’s passing, Tanya hired a retired local lady to help her with cleaning. The property is surrounded by abandoned lots with no standing buildings. It is located near the end of 2nd St., where the dirt road leading to the beach begins.

2nd St. is only about 300 m long and has never been paved; $\frac{2}{3}$ of the properties on both sides of it are unoccupied. However, in 2021 Shabla Municipality¹⁷ allocated funds for its paving, because of its importance for the economic development of the village.¹⁸ Funds were also allocated for repaving 1st St. It starts from the entrance to the village, where the E87¹⁹ main road passes, and it ends at the opposite end of Ezerets.²⁰ The street passes by core social places in the village—the community center and the central square. The latter is actually a small park with a children’s playground, benches and a drinking fountain, and, near it, the renovated church. There is also the village hall, which houses the shop and pub run by Zheni and Emo. In recent years, a few other places along these two streets have become important for the local economic and cultural development, due to newcomers’ social and business activities.

After the tourism boom in the village in 2020, the owners of the hotel and restaurant complex, Rado and Kremena, decided to expand their business. Having previous experience in retail, the couple began the conversion of a single-floor building into a supermarket.²¹ The establishment opened in June 2022. This caused Zheni some concerns, since Rado and Kremena generally have bigger investment projects. However, at this point both shops have distinguished their positions in the industry. Although a detailed comparison of the shopper profile requires a separate study, from our own observations and conversations

with local residents, visitors, and workers at both establishments in the summers of 2022 and 2023, we found that campers and locals, including long-time seasonal visitors of the village, prefer the small shop, and tourists shop from both. We established two reasons for that—the supermarket is a bit pricier and the approach of the owners differs. While the former is ubiquitously important for all customers, the latter matters, especially for the locals. As stated above, Zheni's shop is the only place where local residents may acquire food products throughout the year, and deferred payment is an option for long-time customers. On the other hand, the supermarket's target group is not the locals anyway. Located at the entrance of the village, on the crossroad of E87 and 1st St., a bit away from the residential area of Ezerets,²² the owners aim not only at visitors to the village and beachgoers, but also at travelers from and to Romania, considering such customers as more solvent compared to the local ones. Another proof of this statement is the fact that the supermarket opens only in the summer season.

Similar to Zheni's shop, the supermarket also has an eatery under an awning. The concept is simple, like the pub—grilled meat, salads, basic seafood (mussels and fish), and beer. The eatery, however, also offers a few varieties of coffees, homemade ice cream and some iced drinks for children, all products considered not typical to the local market. The target of such products are obviously tourists and new settlers or seasonal residents in the village. The same also refers to the two new dining establishments in the village that opened in the last two summers. Both offer different varieties of seafood and pasta, grilled meat, fresh seasonal salads and appetizers, wine, beer, and cocktails. Both have only outdoor seating and an open kitchen concept. The newest opened in June 2023. It has a Mediterranean vibe with its blue-white decor. It is on a crossroads, right across the central square. The other one opened in June 2022. It is located on 2nd St. and is well-visible on the way to the beach. The establishment has fewer seats than the other one, but a big grass yard accessible to the visitors. It has a more casual and closer to nature “rural” vibe. The kitchen is in a trailer and the tables are placed right on the grass under a wooden roof. The place is advertised by the owners as kid-friendly. While there is no dedicated children's playground, toys are however available to visitors.

The owners of the restaurant on 1st St. are a middle-aged couple from Varna, who have another property in the village where they have rented two bungalows for years. The establishment is an investment they made because of the growing interest in the region and the settlement, particularly among holidaymakers from Bulgaria and Romania in recent years, as well as the new residents of the village since the pandemic. The owners of the restaurant on 2nd St. have a local background. Although the family have been living in Varna for years, they often visit relatives in Ezerets and spend the summers there. Influenced by the development of the area, they decided to invest in another inherited property on

a key location, which had been abandoned for 20 years. We find it interesting that, in both cases, the old houses on the properties, built in the first half of the 20th century, are not included in the business initiative. They are unrenovated and just loom behind the eating establishments, as if they are not part of the lot. This clearly speaks to the original investment idea of both families—location is what matters in the first place.

The restaurant on 2nd St. demonstrates a sort of implementation of an “old into new” notion by using old peasant chairs from the mid-20th century. The family’s decades-long personal ties in the village makes them more “popular” among locals. The restaurant was often referred to as “better” than the one on 1st St., whose owners are seen more as investors rather than dwellers in the settlement. Of greatest importance to the local embeddedness of the owners of the “rural” restaurant, however, is their business interaction with small food producers in the area. Tomatoes and cottage cheese come from such small farms, and the honey they use in some recipes and sell in jars comes from a female beekeeper from the village. They include these partnerships in their advertising strategy.

We observed similar cooperation between local entrepreneurs in other cases, too. The most distinctive items Zheni sells in her shop are souvenirs. At the beginning, she sold magnets in the shape of Bulgaria, because “it is the most popular thing people buy when travelling,” Zheni stated. However, in time, more people began looking for souvenirs featuring Ezerets—the village and the beach. “At the beginning, one of the families that supplied me with magnets was very skeptical that such an investment would pay off,” she added. Nevertheless, they agreed to try and the idea turned out to be profitable. Afterwards, new products followed—T-shirts, jugs, and water bottles. Photographs of the beach are used for the design. The main entrepreneurs she works with are a couple in their 40s from Sofia, who own an advertising agency based in the capital. About a decade ago, they bought a place in the center of the village and have lived in their caravan there for a few months of the year.

There also are a couple of craft jewelry and accessories ventures, as well as makers of decorative ornaments, who stand out among the traditional agriculture and tourism services. The artists reside in Sofia, they bought houses in the village in the second half of the 2010s and have spent their summers there along with their families. They often get inspiration from the coastal area and craft some of the items while in the village. A business venture, based solely in Ezerets, however, stands out—a garden center. Atanaska (early 50s), who originates from the village, previously worked on overseas cruise ships for more than a decade. Her sister also had a similar occupation for a few years. In 2014, they both retired from their jobs and returned to Varna, then their main place of residence. A year later, they decided to settle in Ezerets, investing their savings in a garden center on their inherited property.

Around the world we have seen this culture of going to a garden center. We don't have that here. . . . It is difficult, but I think we made the right choice, especially with the newcomers,

said Atanaska. The seasonal residents, not only in Ezerets but also in other villages in the region, are the main customers of the center. At the same time, the closeness to Romania turned out to be essential for the business. Over the years, long-term customers have been visiting them whenever they needed to buy plants and look for advice. The two sisters employ two locals.

These small entrepreneurs became an inseparable part of the socio-cultural life of the village. In the last five years, they (as well as other craftsmen from the region) have participated in various cultural events by having their own stalls or/and taking part in the organization process. Two events are worthy of attention—“Jazz by the Sea,” which began in July 2019, and the Green Days, which first took place in August 2020. We consider them both the most essential events in the settlement, shaping its image as a culturally developing place. At the basis of them both is obviously the social interaction among different actors, permanently and seasonally living in Ezerets. The main organizers of the events are counterurbanites, whose backstories and connections to the village differ.

Pavleta (early 50s) is a professional pianist. She was born and raised in the district center of Dobrich. In 2019, she opened a guesthouse in her summer home on 1st St. in Ezerets, a complex of buildings from the early 20th century, which she renovated and rebuilt. In the same year, being herself a musician and having a jazz singer as a daughter, she began producing a three-day musical event, called “Jazz by the Sea.” Each year since then, she has invited musicians from Bulgaria and abroad to perform for locals and holidaymakers in the region. She managed to attract Shabla Municipality as a partner and, since 2021, has secured a small professional stage with proper sound and lighting.

Helen (early 40s) was born and raised in a small town in the south of France. She came to Bulgaria in 2006 as a volunteer for the European Voluntary Service, where she worked with the Public Center for Environment and Sustainable Development in Varna. She came to Ezerets where she met her future husband, a local beekeeper, and stayed in the village. She is an ecologist and has keen interests in natural resource management. Living in a small village in a remote rural area, she became an activist for better waste management, recycling and less use of disposable plastic. In 2020, she was elected by locals as the secretary of the community center. The Green Days was the first large-scale initiative under her leadership. Helen organizes the event with the partnership of a few NGOs from Varna, and the Shabla area that she is a part of or affiliated with.²³ It aims at involving people of different age groups, professions, social status, and interest in actions towards environmental protection and the conscious management of

natural resources. During the three-day event, different activities take place—discussions, craft workshops employing plastic waste and old unused items, sports events, a food and craft bazaar, documentary film screenings, organized games for children, etc. Among the most important activities is the cleaning of the beach.

Both events also have an educational purpose. By taking the musicians out of the concert halls and jazz music out of the piano clubs, Pavleta hopes to offer the local audience a different kind of entertainment. Some of the visitors hear this type of music for the first time, which motivates the organizer even more. “Our goal is to make people love jazz, which is thought to be elitist, but really isn’t,” shares Pavleta. The Green Days, on the other hand, bring up environmental topics discussed within a local context, including the influence of the campers on the ecological balance in the region. Some of these topics are particularly new for the local elders, whose lifestyles include the use of single-use plastic bags, the burning of various waste materials in heating stoves in winter, and so on. Among the most significant educational activities within both events, however, are those involving children. The last day of the jazz fest is dedicated to a workshop for children, when they are taught by professional musicians and have the chance to play different musical instruments. In the environmental event, children are involved in various workshops on using plastic waste as craft materials and cleanup activities in the form of games, and attend discussions regarding waste and keeping the environment clean.

The atmosphere of both events is quite similar. They take place outdoors in central locations along 1st St. The event takes place on an sprawling meadow near the village’s main entrance, right next to the local playground and across from Pavleta’s guesthouse. The eco-event takes place in the central square, and the yard of the community center. The organizers of both events take advantage of the rural environment, and even enhance it by using haystacks as benches. The jazz fest invites the audience to use the area as a picnic site. Attendees place folding chairs and tables, bringing their own coolers, blankets, and food.

The concept of a jazz fest in a rural area, especially by the sea in the summer, has become well-known in the country in recent years. In this sense, the event in Ezerets is not an exception. What makes it stand out, however, is that it takes place in a small and little-known village, relatively far from the big resorts. Advertising the settlement as a vacation-worthy destination is among the goals of the organizers. Therefore, especially in the last couple of years, a few local entrepreneurs have shown interest in partnering in the event. Among the sponsors are the Wild Duck complex and the newly-established restaurant on 1st St. (neighboring the site of the event). By supporting the cultural event, the entrepreneurs advertise their ventures and make a profit from the visitors, especially if they come specifically for the event.

On the contrary, no local entrepreneurs are actively involved in the organization of the Green Days. The event was initially conceived as a non-profit initiative, which aims to create a civil society and to support the critical thinking of individual actors in a number of environmental and social processes in the area. In this respect, as a member of the community center board, Atanaska is actively involved in the organization, without using it to advertise her garden center. Representatives of the older local population also take part in the Green Days. Among the greatest supporters of the initiative are a couple of retired women, who are a part of the close social circle of Helen, on the one hand, approving her work as community center secretary, and on the other, being fond of her personality in general. Their help is sought after by Helen. Some facilitate the organization and others participate in the event mostly by preparing homemade foods and handcrafted items and offering them at the fair. Tanya, the owner of the guesthouse on 2nd St., for example, is among Helen's closest friends in the village. Her teenage grandchildren, who live in Sofia and spend the summer with her in Ezerets, are involved in the organization and participate in various activities within the event.

By 2023, the dynamics of a number of socio-economic processes in the village had changed. According to local residents, entrepreneurs and the media, the slowing of the remarkably steady upswing of recent years came after the spill in the Black Sea. In the early morning of 6 June 2023, an explosion destroyed the Nova Kakhovka dam in southern Ukraine, causing extensive flooding along the lower Dnieper River. Entire villages were flooded, including mines, industrial sites and agricultural land. As a result, large quantities of biogens and petroleum products, animal carcasses and household items ended up in the Black Sea.²⁴

Ever since the incident, the Ministry of Environment and Water of Bulgaria has been carrying out a weekly sampling of the seawater in different places along the coastline and in territorial waters, releasing the results in regular newsletters.²⁵ Although there is no data indicating pollution from the spill, media publications point out the fear of a deterioration in water quality as the reason for the cancellation of some of reservations north of Varna.²⁶ Meanwhile, at the end of July and the beginning of August, there were also continuous cold winds north of Kavarna which led to a drastic decrease in water temperature.²⁷ In Ezerets, local entrepreneurs and residents also confirmed a decreasing tourist interest during the last summer season. "I have not seen the village so empty since before 2020," said Helen. "The campsite is also not as crowded as in the last couple of years," said Tanya. Reservations at her place are also fewer than in the previous summers.

Conclusion

UNTIL RECENTLY, Ezerets was largely unknown outside the Shabla Municipality. Over the past decade, it has gradually gained popularity among wild camping enthusiasts in the country and in Romania. For the last couple of years, as some strive to spend time closer to nature, away from large resorts, it has been developing as a trendy place for escape from the urban hustle and bustle. This transformation has led to a reevaluation of the economic prospects of the settlement, particularly in the domains of rural and recreational tourism. This shift is essential, especially in the light of the obvious decline of agriculture as a family source of livelihood. Thus, in the last decade, Ezerets has naturally focused on various activities driven by the convergence of counterurbanization trends, entrepreneurial ventures, and the village's unique environmental features and peculiar cultural landscape.

We should note that the emerging new initiatives, although not entirely novel in nature, are innovative within the regional and local context. In some of the cases we examined, they are initiated by individuals who have previously lived in urban environments and permanently relocated to the village for various reasons. Other cases discussed in the text deviate from the typical profile(s) of counterurbanites, primarily due to the seasonal residence in the village and rural areas in general, which, however, do not make our interlocutors mere holiday-makers. During their time in the village, they tend to adopt a hybrid lifestyle, balancing aspects of rural and urban living, as well as work and leisure. Their seasonal counterurbanization proves to be more or less indispensable for the local economic development and sociocultural diversification of the environment, while being crucial to their own local embeddedness.

Some of the counterurbanites made this lifestyle transition years ago, when the village was relatively unknown, while others have been drawn to the area by its burgeoning popularity, striving to take advantage of the new emerging opportunities. Some have no prior connection to the village, while others have ancestral ties. Nevertheless, in all cases, there is a common aspiration to integrate into the local community and to become part of the village social and economic life with all its challenges, obstacles, but also opportunities and advantages. The entrepreneurs strive to leverage the available local assets and resources while bringing and using their skills and experiences acquired previously in urban settings. They also benefit from the social capital and relationships with individuals, institutions, and organizations, which they have built in both the urban and rural environment.

There are businesses that are clearly built up and run as family ventures, such as Zheni's bungalows and grocery shop—there are no employees other than family members in both. In other cases, however, people from Ezerets, Shabla and other villages in the municipality are being employed as staff. This refers

to both small businesses and bigger ventures. For the former to make a profit, the number of employees is the bare minimum. Tanya, for example, hired help (one person) only after she was widowed and was incapable of taking care of the property alone. As for the owners of the hotel complex with a restaurant, who also run the supermarket with the eatery, hiring staff is necessary not only in order to maintain the business, but also to be able to grow it. In such cases, hiring in the village and the region is most profitable.

Although Zheni and her husband do not employ locals, they partner up with some local entrepreneurs, seasonal residents, and sell their products. The partners are part of their social network, built while residing in Ezerets. Therefore, to them they are endogenous relationships. The goods are locally-inspired (souvenirs) and some even locally-produced (the lavender products), however, they are entirely intended for extralocal customers. As she explains, “locals won’t buy souvenirs depicting Ezerets.” Such partnerships distinguish the grocery shop from the supermarket.

In this respect, the social events are a good opportunity for collaboration between different entrepreneurs. Artists and craftsmen are partners to the events, showing their support, while selling their products to a certain number of new potential customers (tourists), as well as to already-established ones (counter-urbanites and regular visitors to the village/events). Considering that most of them use internet platforms for advertising and distribution, such small forums are a good way for small business expansion, receiving feedback face-to-face, or just for mingling with other artists and craftsmen.

Bearing in mind the growing popularity of Ezerets in recent years, the accommodation facilities in the village enjoy relatively high occupancy during the two months of the active summer season (July and August). In this sense, it would be difficult to establish a direct influence of the cultural events on the industry. According to the organizers, the Green Days are rather a bonus for those vacationing in the village, including at the camp site, while the jazz fest could be seen as a specific reason for some visitors to plan their stay accordingly.

Restaurants and shops certainly benefit from the events. For example, visitors to the Green Days buy water, drinks, snacks and tobacco throughout the entire day, since there are various events from late morning to late evening. The jazz fest audience also shop for the picnics they have on the concert meadow. Often, at the end of the day, the eventgoers dine in or order food-to-go from the eateries and the restaurants. Thus, such a profitable outcome motivates two of the establishments in the village to become one of the main sponsors of the jazz fest, as mentioned earlier.

The main organizers of both events, Pavleta and Helen, are small rural entrepreneurs themselves. So, this raises the question as to whether they (can) benefit financially from the fests. Pavleta houses as many of the artists for the fest as she

can in her guesthouse for free, and Helen and her husband do not sell much of their apiculture products in the food fairs during the eco event. At the same time, the organization of both events takes up months of their own time. Both women expend great social capital, for that matter—recruiting volunteers for the tasks before, during and after the events; finding sponsors, performers (for the jazz fest), lecturers for the discussions (the Green Days), and moderators for the workshops, etc. The resources they use are both exogenous—performers, lecturers and moderators very distinctly fall into that category—and endogenous—some of the volunteers, for example, are locals. However, the sponsors and partners to both events are exogenous and endogenous, and most of the volunteers are newcomers to Ezerets with years-long ties to the region, residing seasonally there, including some of the craftsmen. In this respect, both women do not directly benefit financially from the events they organize. While Helen and her husband do not count on such publicity for the distribution of their products in general, but on their own social network beyond the village and the region, Pavleta, as a guesthouse owner, can benefit from the advertisement of the settlement as a small rural cultural center. Such an image is definitely sought after by many of the fans of rural tourism, who spend their summer holidays in the village. □

Notes

1. Such movements are examined as a manifestation of urbanization; they represent the sprawl of a modern urban life and, in time, lead to an expansion of metropolitan built-up area. See more on this discussion in Pileva, Markov, and Periklieva 2023, 18–19.
2. As of 2022, the population of Dobrich was 89,182, <https://www.grao.bg/tna/tadr-2022.txt> (in Bulgarian), accessed 8.12.2023.
3. As of 2022 its population was 349,201 <https://www.grao.bg/tna/tadr-2022.txt> (in Bulgarian), accessed 8.12.2023.
4. Out of nearly 20,000 decares of Ezerets land, about 15,000 decares are cultivated, <http://bg.guide-bulgaria.com/NE/dobrich/shabla?t=sizes> (in Bulgarian), accessed 8.12.2023; https://www.landlord.bg/map/Добрич_Шабла_Езерец (in Bulgarian), accessed 8.12.2023.
5. “400,000 fish were released in the Durankulak and Shabla Lakes.” *Trud*, 18 June 2018, <https://trud.bg/пуснаха-400000-рибки-в-дуранкулашкото-и-шаб> (in Bulgarian), accessed 8.12.2023.
6. See also “In the municipality of Shabla, an increase in overnight stays is anticipated for the tourist season of 2022,” *Dobrudzha Information Agency*, 6 April 2022, https://dobrudjabg.com/novina/v-obshtina-shabla-ochakvat-ryst-na-noshtuvkite-v-turisticheski-sezon-2022-video-/77515?fbclid=IwAR1qBwSERI-Rys3DIXIFVXHZ-KLBoxAZSA_KrwpFpXCRPzSwdryP0bk4j0xM (in Bulgarian), accessed 8.12.2023.

7. National Tourist Register, <https://ntr.tourism.government.bg/CategoryzationAll.nsf/mn.xsp> (in Bulgarian), accessed 8.12.2023.
8. Ibid.
9. Wild camping refers to setting up a temporary camp in a natural environment, often away from designated campsites or established facilities. It typically involves camping in remote, less-travelled areas such as forests, mountains, or along riversides or lakeshores, etc.
10. For more in-depth analyses of these processes and the motivations behind them, see Pileva, Markov, and Periklieva 2023, 11–15.
11. For more detailed analyses of the urban-rural movements in Bulgaria due to the COVID-19 pandemic and the measures imposed, see Pileva and Markov 2021, 543–560.
12. The Civil Registration and Administrative Services General Directorate provides current data on the country's population by current and permanent address in various administrative units in Bulgaria (district, municipality and settlement). Data for the current year is updated every three months, <https://www.grao.bg/tables.html>, accessed 8.12.2023.
13. For more in-depth analyses of push and pull factors for urban-rural migration within the Bulgarian context in the last decade, based on ethnographic research carried out in a couple districts in the country, including Dobrich District, see Pileva, Markov, and Periklieva 2023, 30–36.
14. The fee is 2 BGN (1 euro) per 10 m².
15. “The camping sites in Shabla Municipality have been designated,” *BNR—Varna*, 23 June 2017, <https://bnr.bg/varna/post/100845560/opredeliha-mestata-za-kampin-guvane-v-obshtina-shabla> (in Bulgarian), accessed 8.12.2023.
16. The restaurant offers Balkan cuisine and some seafood dishes. They claim to have 300 seats in the restaurant (indoors and outdoors).
17. Protocol no. 35 from a session of the Municipal Council—Shabla, 29 October 2021, <https://shabla.bg/wp-content/uploads/2021/10/РЕШЕНИЕ-277-ОТ-29.10.2021.pdf> (in Bulgarian), accessed 8.12.2023.
18. It starts at the crossroads right before the community center, on 1st St., and it ends where the dirt road leading to the beach begins.
19. Road E87 is part of the European road network. It starts in Odessa, Ukraine, passes through/by many Black Sea settlements in Bulgaria, and ends in Antalya, Turkey.
20. Cadastral map of Bulgaria, <https://kais.cadastre.bg/bg/Map>, accessed 8.12.2023.
21. The building is on a property the family owns (previously part of the local cooperative farm). On the lot, there is also a three-floor unfinished building (constructed in the late 2000s), which was meant to be a hotel. On the first floor, there was a roadside eatery that did not succeed and closed after a year.
22. It is important to note that many of the elderly residents, who dwell in the village all year long, live alone and do not drive.
23. Organizers are the community center, the NGO “Dobrogea” (established for that matter by a group of women from the Shabla region), and “Place Ezerets” (part of the “Place Bulgaria” citizen initiative for the development of public spaces and the

- urban environment, a project of the NGO “BG Be Active,” <https://www.facebook.com/myastoezerec>, accessed 8.12.2023).
24. “A disaster in photos: Nova Kakhovka dam breach in Ukraine,” *EU Civil Protection and Humanitarian Aid*, 27 June 2023, https://civil-protection-humanitarian-aid.ec.europa.eu/news-stories/stories/disaster-photos-nova-kakhovka-dam-breach-ukraine_en, accessed 8.12.2023; “Ukraine dam: What we know about the Nova Kakhovka incident,” *BBC News*, 8 June 2023, <https://www.bbc.com/news/world-europe-65818705>, accessed 8.12.2023; <https://uncg.org.ua/en/the-consequences-of-the-russian-terrorist-attack-on-the-kakhovka-hydroelectric-power-station-hps-for-wildlife>, accessed 8.12.2023.
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Abstract

Counterurbanites As Drivers of Innovation and Local Transformation: A Case Study from Coastal Dobrudzha, Bulgaria

The study focuses on the village of Ezerets, located in a remote rural area near the Bulgarian–Romanian border. Based on ethnological research, the study investigates the motivations, experiences, and contributions of counterurbanites, both Bulgarian and foreign citizens, who have chosen to settle in the village. It examines the innovative practices, ideas, and entrepreneurial initiatives brought by the newcomers and their contribution to the social, economic, and cultural transformation of the village. The study also explores the challenges and opportunities that arise from the interactions between counterurbanites and the local population, emphasizing the importance of inclusive practices and social integration. The findings highlight the significant role of counterurbanites in diversifying livelihood strategies and activities in search of local sustainability, including the establishment of ecological and rural tourism ventures, and the revitalization of cultural and social life in the village.

Keywords

counterurbanization, remote areas, rural revitalization, entrepreneurship, local embeddedness

The Student Movement beyond the Confines of the University Scenes from the Brutalization of the City of Cluj in Early 1924

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This peaceful and more serene presence of the students in the social life of the city endured, even if as time went by it was overshadowed by noisier or more brutal forms of manifestation.

FORESTALLING THE organization of the General Congress of the Press (scheduled to take place on 16–18 December 1923 in Cluj) was a resounding “success” of the student movement that had emerged in the city more than a year prior. The students occupied the rooms prepared for the sessions of the congress, and all the commotion, the booing, the general atmosphere of fear made it impossible to hold it. On the city streets, the violent actions taken against Jewish companies and shops created even more anxiety. The press organizations that the students had targeted (as the institutions that allowed for the free expression of all opinions) informed the whole country about their actions. The effects of this unfortunate initiative were to be soon felt also by the local authorities, which had proven incapable of maintaining order.

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Despite having done “his best” with the limited means at his disposal, and without being publicly blamed for anything, the then Cluj police prefect, Valer Popoviciu, was “transferred to a different office” about a month after the events surrounding the planned Congress of the Press. His replacement was Ovidiu Gritta, formerly the police prefect of Arad and—even if this rather important detail was not mentioned when he was introduced—someone who had played an important part in ensuring the orderly organization of the Great Assembly of Alba Iulia, on 1 December 1918,¹ which was quite a notable achievement. Presented as a valuable asset who had proven his qualities and efficiency “in all the important and demanding positions that he has held so far,” as a man “raised in the cult of justice,” he was called upon to bring peace to the city and ensure “perfect order” for all citizens.² He introduced himself as someone who would never “make the slightest distinction between the city residents, regardless of their religion or ethnicity,” highlighting the primacy of the law and of its strict observance: “I will be the fiercest enemy of those who do not respect the laws of the Romanian state.”³ The new police prefect even requested that the public assist him in the fulfillment of his mission to serve the law-abiding citizens and punish the lawbreakers. The special introduction (the providential man) and the explicit reference to the citizenry, “regardless of their religion or ethnicity,” indicate that things had come to a critical point, and the government was determined to take firm measures, especially in the university centers. More than a year after its inception, the student movement was still going strong, actually gaining momentum. It had seriously challenged the “normal” functioning of the university and presently it was sending increasingly strident warnings to the government, the local authorities, and the press. The presence of the new nationalist trend among students had not only affected the activity of the university and the life of the city, but also student life itself.

After the Union, the now-Romanian city of Cluj had enthusiastically and even gratefully received a large number of young people, who brought much-needed energy to the city. The presence of the youth at the great celebrations or festivities that commemorated the major moments in the new, Romanian history was very much appreciated. This was the case when several student pairs performed the “Romana,” a Romanian folk dance, at one of the first soirées organized by the new administration. In a simple and eloquent manner, they managed to illustrate the ongoing changes: a new culture (until then confined to folk manifestations and maybe looked down upon) was making its presence felt in the ballrooms of the local high society. This peaceful and more serene presence of the students in the social life of the city endured, even if as time went by it was overshadowed by noisier or more brutal forms of manifestation.

The students are an important driver of the social and cultural life of our city, which has turned Romanian during the few years of the Romanian administration. The students of Cluj, apart from providing us with many new members of the civil service, very important for the new Romanian administration, are also behind the organization of many social or cultural events.⁴

The celebrations held by the students from Făgăraș, the ball of Banat students, the literary and philosophical student clubs, the occasional conference, clarinet solo or operatic aria, folk songs or poems recited by the actors of the National Theater, piano recitals or student choirs,⁵ all exemplified the peaceful, more “bourgeois” presence of the students in the social life of the city. Highlighting these moments also had a compensatory function, demonstrating that the instances of student participation in public life could not be subsumed to a single category.

The students themselves seemed to have changed their self-image, the manner in which they identified as a corporate body. Always willing to set themselves apart from the “other” world, to be seen as distinct, as different within the social body, the students began to assimilate the changes they experienced following the involvement in the movement they had started in the autumn of 1922.

Amid this ideological upheaval, students no longer party as they used to. The cafés are increasingly empty, and late at night you would be hard-pressed to find a student in a café or restaurant. On the other hand, the offices of the student centers and various organizations are increasingly crowded. Until the wee hours of the morning they work and ardently and enthusiastically discuss various social issues. The Jewish question, corruption in public life, and other current aspects. Each and every one brings forth ideas, provides information and enthusiastically volunteers to do propaganda work in support of the national idea. The continuing heated and bold debates have made the students more open, more sincere, nearly violently so . . . In everyday life students appear increasingly sure of themselves, more responsible and very keen on the idea of honor. Their solidarity is amazing, the interest for those incarcerated at Văcărești remains constant.⁶

Despite the rebukes coming from the generation of their parents and professors, the students see their new social involvement as a sign of maturity, of responsibility, of having assumed the struggle for a cause. What some see as irresponsible, as a betrayal of the actual purpose of attending a university, is perceived by the others as a semantic and functional reinvestment, with obvious benefits in terms of self-perception. A perception, however, that could lead to excessive

self-confidence, to an exacerbated sense of honor, with the known results: the sense that they can do anything, always backed by the supreme justification—their higher cause. The self-justification revisits and strengthens the idea of an intergenerational conflict (which would be quite striking in the proverbially peaceful and torpid Transylvania), combined with that of shaping a new and genuine nationalism, a “truly Romanian” one:

This is our university youth of today. It would be a mistake to believe that they are not studying, that they are shallow or unfocused. It may be that students were never more interested in what happens around them than they are now. . . . The constant exchange of ideas and the discussions taking up all their available time are however changing them into a completely new element. This appears to be the genuinely Romanian element, stripped of all foreign influences. Particularly in Transylvania, the differences between the younger and the older generation have become quite striking. However, the youth are rapidly progressing along the path they have chosen, and their elders can no longer quiet them with their mild-mannered approach and life experience.⁷

Given such beliefs—that they are right, that they cannot be stopped—also encouraged by previous “successes” (when they had suffered minimal consequences following their actions), the students soon resumed their assault on the city.

In early February of 1924, after a series of celebrations dedicated to the Union of the Principalities (the 65th anniversary), the students took to the streets (“in close ranks”) and, after an animated speech delivered by one of them, they prepared to continue their march towards the house of Professor Iuliu Hațieganu and towards the dormitories.⁸ Police cordons barred their way, and the clashes between the two sides lasted for quite some time, “the students scattering and then coming together again. Several newspapers were burned in Union Square.”⁹

A few days later, displeased with an article published in *Új Kelet* (a Hungarian-language Zionist newspaper, also attacked in the days following the outbreak of the student revolt of 27–28 November 1922), which expressed some reservations in regard to one of the conferences held by Professor I. C. Cătuneanu¹⁰ and criticized “our state, which is too weak to suppress the anti-Semitic movements,”¹¹ in the evening several students broke into the offices of the newspaper “seeking to lynch the editors.”¹² The latter actually managed to call the police before their phone lines were cut, and fled to safety. The offices, however, were vandalized, their windows broken, their lamps and typewriters smashed, and their papers ransacked. Arrived at the scene, the police did not find “a single student,” but 18 arrests were made later.¹³ Several lawyers promptly stepped forward to defend those arrested.

The witness account is quite eloquent. However, the editorial staff of the *Patria* (Homeland) newspaper also added an opinion piece on the issue, which highlighted the erosion of the civic spirit and the significant spread of anti-Semitic ideas, while also providing some local color. The newspaper associated with what was at the time the most tolerant party in relation to the minorities (the National Party) sought to clarify its position. Naturally, such excesses, “albeit justified,” could not be condoned, especially by people who had been discriminated against in the past, when the Romanian editorial offices had fallen victim to “the rabid Hungarian authorities”; however (!), then and now, there was a privileged guilty party:

*The Jews were then and remain today the spoiled child of good fortune. . . . If today our country finds itself in such a poor state, the blame goes first and foremost to the politicians, with the Jewish element a close second.*¹⁴

The brazen description of Cătuneanu’s “sources” as fakes (which they actually were, as it had been already proven in the case of the *Protocols of the Elders of Zion* and of other similar texts)¹⁵ was deemed unacceptable and had to be refuted outright:

*The documents cited by Professor Cătuneanu are not figments of the imagination. They actually exist. And the “fakers” of Isaac Blumchen’s statements are certainly not Romanian. Professor Cătuneanu’s conference and the whole doctrine that underpins the anti-Semitic propaganda are not the work of underground laboratories. They are the outcome of serious research drawing precisely on the systematic work of the Semitic propaganda.*¹⁶

The evening theatrical performances had become more than just a pretext for a modern rendez-vous, being almost unavoidably followed by student demonstrations and clashes with the police. After seeing a play, the students would take to the streets:

*Yesterday evening, after the end of the show at the National Theater, the students walked the streets in groups singing patriotic songs. From the statue of the Capitoline Wolf the students went to the Dormitory. Still, a large group went down King Ferdinand Street, where they were joined by many other city residents, blocking the traffic. The police arrived at the scene, with rifles strapped to their backs, moved towards them and drove them to the corner leading to Union Square, where the students closed ranks, booing the police, who opted for the heavy-handed approach. . . . Several students were beaten, but also some local authority officials.*¹⁷

The attention given to the National Theater also had an impact on its repertoire. The students' attempts to censor (punish) the press led to reactions against some of the authors whose plays were staged at the theater. It was rumored that "the students will protest against the author— D. A. Hertz—whom they believed to be Jewish."¹⁸ A timely piece published by *Patria* showed that that was not the case, and a Liberal commentator did not miss the opportunity: "who could know of this more than *Patria*, as the National Party has contacts with the likes of Honigman, Brănișteanu, Sloimsohn."¹⁹

The events of March somewhat shifted the attention of the militant students back to the university. However, not all of their actions were related to university matters. One of them was by now familiar:

*Yesterday evening at the Anatomical Institute of the University there were significant disturbances caused by the students. The Christian students violently ejected the Jews from the classes, badly beating them up and chasing them down the city streets. Several people have been injured. The authorities have opened an investigation.*²⁰

Another episode took place within the premises of the university, but had the streets as its starting point, as that was the place where students were increasingly clashing with the police. One such clash had a dramatic epilogue, in the very building of the Rector's Office.

Having come to the Rector's Office "for a personal matter" (according to the *Înfrățirea* [Brotherhood] newspaper) or after a call made by Rector Nicolae Bănescu, who wanted to be informed on an ongoing investigation (according to *Patria*), Police Prefect Gritta fell into an ambush. After some students saw him, those who were at the university gathered in front of the building of the Rector's Office, calling him out (he was the one coordinating the nocturnal activities of the police). Alerted by their colleagues, other students showed up, some coming "from the dorms," occupying "all rooms in the University."²¹

*Chased by students, Mr. Gritta sought shelter in the faculty offices, locking several doors behind him. The rector's attempts to pacify the students were in vain. Eager to get their hands on the police prefect, the students smashed through two of the locked doors, but failed to reach the room in which Mr. Gritta had locked himself. He thus remained trapped amid several hundred extremely agitated students.*²²

Like in the hostage crises that we see in movies, several solutions were attempted. The pleas of Rector Bănescu were in vain. A platoon of the guard showed up at the scene, followed by a company of unmounted gendarmes, the general prosecutor, the chief prosecutor, the army chief of staff, etc., all seeking the release of the

hostage. None succeeded. Only the presence of Amos Frâncu calmed them down a bit, but only after he promised the insurgents that an inquiry would be opened into “the aggression against the students.” Mr. Frâncu also pledged to send “a telegram to the prime minister, requesting the dismissal of Gritta.”²³ (The latter appears to have been a personal initiative, not supported by the other representatives of the authorities present there.) The emotions and the anxiety stayed at maximum level at the university, for quite some time: “for nearly six hours” the university had “experienced a true state of war.”²⁴ Gritta was eventually able to leave the building, after having spent all this time “fully sequestered.”²⁵

THE CENTRAL authorities responded by dispatching to Cluj the under-secretary of state for internal affairs, Gheorghe Tătărescu, in order to determine exactly what had happened. The political statements he made on this occasion indicate the approach chosen by the government: “those responsible for what happened at the University on 18 March of this year cannot be our students,” as they acted like “agents of violence and brutality” and are but “a handful of agitators,” “a minority,” “those lying in wait for any such generous movement”; behind the nefarious deeds were “some shady characters, not students,” but—nevertheless!—the event was “a painful trespass on the part of our university youth,” who must understand that such events “can only tarnish the reputation of our university life,” the “reputation of our own country”; our students “cannot be the instruments of anarchy.”²⁶ Tătărescu was once again seeking to make a distinction between the majority “good” of students, on the one hand, and the “handful of agitators” and the occult interests that only tarnished the image of both university life and the country as a whole. He was basically reiterating the elements highlighted by the authorities on other similar occasions, in an attempt to limit the damage and even to minimize the seriousness of the offences in the eyes of the public, in order to give the impression that matters were well in hand.²⁷ Politicians, and not only them, were reflexively avoiding to hurt the oh-so-pure and noble feelings of the youth (who, after all, were not entirely wrong, it’s just that they tended to be a bit too... outspoken). On such occasions, maximum care was shown in regard to the “juvenile” susceptibilities and sensitivities. As we have already seen, this only emboldened the students. The opposition politicians were also generously lending a hand. In the House, representative Sever Dan, general secretary of the National Party, formulated the following perspective on the events:

the student movement has been repressed by the law enforcement agencies, especially in Cluj, in the most brutal manner. The University has turned into a police state, and then the restrictions have been extended even to the most harmless of street

*protests. Policemen, armed to the teeth, pounce on the groups of students the minute they show up on the street, beating them up, causing injuries, making arbitrary arrests, often seizing the most peaceful passers-by.*²⁸

The justice minister (a position then filled by Gheorghe Mârzescu) was also told in no uncertain terms to make sure that “there is no procrastination in the trial of the students arrested for an alleged plot.”²⁹ This parliamentary speech is a good example of the manner in which the point of view of the “persecuted” students was taken for granted, without any nuance, simply because under the specific circumstances it could be used to attack the government. Indeed, the increasing turmoil among students could also be ascribed to the upcoming trial of the plotters and the rumors of another possible postponement thereof, but this can only be a partial explanation. The student movement had moved well beyond the stage of merely reacting to a specific context; presently, it was seeking to create that very context.

Rector Nicolae Bănescu was among the few people willing to actually do something in the wake of the critical events experienced by his institution. He asked the students who were staying in the dormitories to leave their student cards, which had their photographs affixed, with the Rector’s Office, in order to identify those with whom he had spent nearly six hours in the vain attempt to have the siege lifted. He eventually recognized the faces of about 25 of them, “mostly law students.”³⁰ In the first Senate meeting after the events of 18 March 1924, he expressed his disappointment with the civilian and the military authorities, fully supported by the former rector, Professor Iacob Iacobovici, who had also been in a similar situation: “the university administration struggles when the civilian and military authorities do not fulfil their obligations and, for reasons unknown, fail to do their duty.”³¹ Virgil Bărbat—the sociologist who, in the previous academic year, had set up a special fund for the financial needs of the students³²—intervened in the debate and pointed out that “one school is the hotbed of anarchy in our institution. Nearly all the perpetrators come from the Law School.” He requested that this be communicated to the ministry, without forgetting the “reprehensible attitude of some professors who actually encourage the student agitators.”³³

In the wake of the opinions voiced in Cluj by the government representative, the investigation of a serious case of illegal confinement involving a high local official was somewhat kept under wraps.³⁴ Absurd positions are also relatively easy to find when it comes to the events occurred at the university: “While the students did confine the Cluj Police Prefect, this does not mean that they obstructed law enforcement in the Transylvanian capital.”³⁵ There are repeated exhortations to the students to return to their role as “creators of culture,”³⁶ in a bizarre combination

of flattery and “parental” tones. In fact, over the past few months, the students (or at least some of them) had actually sought to censor culture, attempting to impose their own evaluation criteria on the press or on the local theatrical repertoire.

Also revisited are the topics concerning the precarious financial situation of some of the Romanian students in Transylvania,³⁷ worsened in Cluj by the housing shortage and by the high cost of living,³⁸ without forgetting the attempts of the authorities to provide the students with scholarships, dormitories, room and board.³⁹ The comparison of the ratios between Romanian and Jewish students for the past few years is also intended to send the same message: there are plenty of reasons for you to finally calm down. The number of Jewish students at Cluj University had decreased by half from one year to the next. In the 1922–1923 academic year there were “508 Mosaic students in a school population of 2581,” while the following year they were 246 of a total of 2,123.⁴⁰ However, these were voices calling in the wilderness, as the student movement had already transcended the confines of the university. As explained by one of its supporters, the movement

*was intended to break out of the universities and become part of the public debate. It was presently the pivot for the actions of any Romanian individual aware of the danger posed to Romania by the Semitic element.*⁴¹

In other words, the movement had become the central axis in an ensemble of forces representing the ideological family of anti-Semitic nationalism.



Notes

1. *Alba-Iulia: Organ al proclamării unității naționale*, special issue, 18 Nov./1 Dec. 1918: 2–3; *Românul* (Arad) 7, 20 (20 Nov./3 Dec. 1918): 1.
2. “Instalarea noului Prefect de poliție la Cluj,” *Înfrățirea* (Cluj) 4, 999 (31 Jan. 1924): 3.
3. *Ibid.*
4. “Viața studentească la Cluj,” *Înfrățirea* 4, 1031 (11 Mar. 1924): 4.
5. *Ibid.*
6. Aurel Gociman, “Studentimea de azi,” *Patria* (Cluj) 6, 4 (7 Jan. 1924): 9.
7. Gociman, 9.
8. “Manifestația studenților,” *Patria* 6, 26 (8 Feb. 1924): 2.
9. *Ibid.*
10. I. C. Cătuneanu was a professor at the Law School and one of the most active members of the Romanian Action association, which at that time was holding a series of conferences in the cities of Transylvania.
11. “O nouă manifestație studentească la Cluj,” *Patria* 6, 31 (15 Feb. 1924): 1.

12. Ibid.
13. Ibid.
14. “Cazul Új Kelet,” *Patria* 6, 31 (15 Feb. 1924): 1.
15. The fact that the *Protocols* were a forgery had been already proven by mid-1921, but this did not prevent their continuing international “success” as, whenever necessary, they were periodically brought up as “evidence” of the international Jewish plot. See Pierre-André Taguieff, *Les Protocoles des Sages de Sion: faux et usages d’un faux*, vol. 1 (Paris: Berg International, 1992), p. 7–15 and passim for a complex analysis of the text and of the context, on the manner in which it was used, etc. For a mostly juridical approach, see Hadassa Ben-Itto, *The Lie That Wouldn’t Die: The Protocols of the Elders of Zion*, preface by Lord Woolf, foreword by Edward R. Korman (London–Portland, OR: Vallentine Mitchell, 2005). There have been a few relatively recent Romanian translations as well, with certain contemporary iconographical additions. See *Protocolo-alele înțelepților Sionului*, translated by Ion I. Moța (Bacău: Editura Vicovia, 2012).
16. “Cazul Új Kelet,” 1.
17. “O nouă manifestație studențească,” *Patria* 6, 32 (17 Feb. 1924): 3.
18. “Informații,” *Înfrățirea* 4, 1016 (22 Feb. 1924): 2.
19. Ibid.
20. “Grave turburări la Universitate,” *Patria* 6, 58 (19 Mar. 1924): 2. As known by anyone with an interest in the memoirs of the interwar period, student violence was quite obviously not the exclusive province of the city of Cluj. It was rather a feature of a generational model, a stylistic overtone directly experienced by those who attended university in those times. Henri H. Stahl wrote: “For instance, at university, this generation asserted itself by way of rallies, of the fights they set up, until fairly late in the twenties... I was there in 1923–1924, yes, and in 1925, I was still in college, at the School of Economics. I remember them bursting into the lecture hall, beating us up and kicking us out.” Zoltán Rostás, *Monografia ca utopic: Interviuuri cu Henri H. Stahl 1985–1987* (Bucharest: Paideia, 2000), 41.
21. “Tulburările de la Universitate,” *Patria* 6, 59 (20 Mar. 1924): 2.
22. Ibid.
23. Ibid.
24. Ibid.
25. “Incidentele de ieri de la Universitate,” *Înfrățirea* 4, 1039 (20 Mar. 1924): 2.
26. “Anchetarea desordinilor studenților din Cluj,” *Înfrățirea* 4, 1041 (22 Mar. 1924): 1.
27. On other liberal states (regimes) who vacillated between legality and attitudes favorable to such manifestations, see also Mimmo Franzinelli, *Squadristi: Protagonisti e tecniche della violenza fascista 1919–1922* (Milan: Feltrinelli, 2019), 87–119.
28. “Reprimarea mișcării studențești,” *Patria* 6, 63 (25 Mar. 1924): 1.
29. Ibid.
30. “Agitația de la Universitate,” *Patria* 6, 63 (25 Mar. 1924): 2.
31. Serviciul Județean Cluj al Arhivelor Naționale (Cluj County Division of the National Archives, hereafter cited as SJCAN), coll. *Universitatea din Cluj*, Meetings of the University Senate, file 5, fol. 51v.

32. “Fondul *Virgil Bărbat* pentru ajutorarea studențimii române sărace,” *Dacia Nouă* (Cluj) 1, 1 (23 Dec. 1922): 3.
33. SJCAN, coll. *Universitatea din Cluj*, Meetings of the University Senate, file 5, fols. 51v–52r.
34. “Anchetarea dezordinilor studențești,” *Înfrățirea* 4, 1042 (23 Mar. 1924): 2. Of course, the press of a different orientation contended that “the investigation of the student unrest in Cluj has proven the guilt of the county and police prefects, Messrs. Mureșan and Gritta, as well as of the University rector.” The information in question had allegedly been published by *Universul* and was taken up in “Ancheta agitațiunilor studențești,” *Patria* 6, 65 (27 Mar. 1924): 3.
35. Marin Dragnea, “Mișcarea studențimei,” *Clujul* 2, 13 (30 Mar. 1924): 1.
36. “Datoria studențimei,” *Înfrățirea* 4, 1042 (23 Mar. 1924): 1.
37. In his memoirs, I. Negoiteșcu writes about the manner in which, years later (in 1937), he came to be part of one such “brotherhood,” alongside two former high school classmates. During a visit to the family of one of them (at Mirăslău, near Aiud), he came “into direct contact with destitution.” Even if it was the family of a priest, they lived “in abject poverty”: I. Negoiteșcu, *Straja dragonilor: Memorii 1921–1941*, edited, preface and notes by Ion Vartic, foreword by Ioana Pârvulescu (Bucharest: Humanitas, 2009), 149–150.
38. The very high cost of living in Cluj as compared to other cities was also exemplified by the comparison between restaurant price lists from Iași and Cluj. Cluj prices were two or three times higher, which triggered the prompt explanation: here, “restaurant owners are mostly foreign.” “De ce se scumpește viața la Cluj?” *Înfrățirea* 4, 1035 (15 Mar. 1924): 1.
39. “Situția materială a studențimei,” *Înfrățirea* 4, 1046 (28 Mar. 1924): 4
40. “Câți studenți sunt la Cluj,” *Înfrățirea* 4, 1044 (26 Mar. 1924): 4.
41. Dragnea, 1.

Abstract

The Student Movement beyond the Confines of the University:
Scenes from the Brutalization of the City of Cluj in Early 1924

The present study analyzes the transformations experienced by the student body as a consequence of the nationalist movement which emerged and made its presence felt in the 1922–1923 academic year, as well as some of the interactions between the students and the representatives of the society at large: local and academic authorities, the press, the local theater, etc. After preventing the organization of a General Congress of the Press in Cluj (December 1923), the representatives of the nationalist students continued to brutalize the city: violent street incidents after the performances at the local theater, the illegal confinement of the police prefect in the premises of the University, the vandalization of the offices of a newspaper, etc. Also presented are the reactions of the various authorities (central or local) and of the press to the actions of the students.

Keywords

student movement, violent incidents, anti-Semitism, nationalism, Cluj University

Die „Mitte [...], die mich zurücknimmt“

ANDREI
CORBEA-HOISIE

Paul Celans Ringen zwischen „Zentrum“ und „Peripherie“

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AM 12. Januar 1952 beantwortete Paul Celan einen Brief des österreichischen, in London lebenden Dichters Erich Fried, den er gerade im vorigen Sommer während eines zweimonatigen Aufenthaltes bei Verwandten in England besucht hatte. Mit Blick auf Erich Frieds ergiebigen Bericht über zahlreiche Arbeitsprojekte klagt Celan über die vermeintlich eigene literarische Unfruchtbarkeit und kommt dann umgehend auf das Unstete in seinem damaligen Leben zu sprechen, das jenseits des Studiums an der Sorbonne und des festen Vorhabens, zum französischen Staatsbürger zu werden, von zahlreichen Ungewissheiten geprägt war.¹ Weder von den alltäglichen materiellen Schwierigkeiten noch von den mit dem Entschluss, dem innerlichen lyrischen Ruf zu folgen, verknüpften sozialen Risiken wollte er jedoch erzählen, sondern von jenem Wagnis, das er später, in der *Bremer Rede*, konkreter andeuten wird, als er

sein Gedichte-Schreiben als einen Versuch darstellte, sich mittels der Sprache „zu orientieren“, „zu erkunden, wo ich mich befand und wohin es mit mir wollte, um mir Wirklichkeit zu entwerfen“.² In jenem Pariser Winter bemühte sich Celan, die Bewusstheit seines schwankenden Gemütszustandes gerade durch die Veranschaulichung dessen räumlicher „Über-setzung“ zu stärken; es galt überhaupt jenen Konvergenzpunkt zu „ver-orten“, an dem das sich abspielende Schicksalhafte in die dichterische Aussage zu münden vermag. Das Gefühl der polarisierenden Zerrissenheit, des „Müdlaufens“ an der „Peripherie“, die keine versöhnende und vermeintlich poetisch ertragreiche „Mitte [...]“, die mich zurücknimmt“ – wie sie Erich Fried scheinbar vergönnt war – gestattete, veranlasst ihn zu „ein bisschen Geographie zu meiner Ernüchterung“, was eben im nächsten Schritt schon zur schmerzlichen Frage weiterführte: „wo habe ich denn wirklich gelebt, in welchem Land, unter welchen Menschen“?³ Das unterstrichene *wo* verlagert die Akzente um so mehr im Räumlichen einschliesslich all seiner geschichtlichen Verstrickungen: im Pariser Exil grübelt Paul Celan darüber, ob es für ihn auch Orte und Gegenden gegeben hat, die sein bisheriges Leben nicht „beschädigt“ haben; die skeptische Frage wiederholte sich bis spät in die zweite Hälfte der 60er Jahre, wie in jener Notiz am Rande einer Kapitelüberschrift in Jean Amerys Buch *Jenseits von Schuld und Sühne*, in der er den Satz des Autors „Wieviel Heimat braucht der Mensch“ mit der verzweifelten Bemerkung ergänzte: „Heimat ... und ich? Ich war nicht einmal zuhause, als ich daheim (zuhause) war.“⁴ In der Darmstädter *Meridian*-Rede 1960 wird Celan die „Toposforschung“ von ihrem üblichen Medium der Gedächtnisarbeit symbolisch trennen und zum zu „erforschenden“ Gegenstand der „Utopie“ erklären:⁵ die Utopie einer zu verortenden Wieder-findung, die gleichzeitig auch eine echte und endgültige Selbstfindung sein könnte und würde.

Der abschliessende Teil der Rede, die Celan als Georg-Büchner-Preisträger gehalten hatte, kann darum auch als ein „meridianhafter“ Kreisschluss im Verhältnis zum vorher erwähnten Brief an Erich Fried gelesen werden, denn in ihren letzten Absätzen setzt sich der Dichter mit denselben, im frühen Schreiben nach London noch unscharf anklingenden Fragestellungen auseinander. Es leuchtet vor allem ein, dass Celan mit der Figur des „Meridians“ den grundlegenden Baustein seiner als „Geopoetik“ betrachteten Konzeption von einer „In-der-Welt“ positionierten Dichtung legte.⁶ Mit Rücksicht auf die Heideggersche Metapher der Sprache als „Haus des Seins“⁷ (aus dem Essay *Wozu Dichter?*, den Celan schon 1953 zur Kenntnis genommen hatte),⁸ wird Celan später in einer vorbereitenden Aufzeichnung für die *Meridian*-Rede anmerken, dass sofern das Gedicht „als ein Stück Sprache zur Welt“ kommt und letztendlich diese Sprache „mit Welt befrachtet“ sei, vermag „die Sprache“ auch „Welt zu sein“.⁹ Die Gedichte werden zu „Wortlandschaften“ oder zu „Sprachräumen“,¹⁰ die sich

mithilfe räumlicher Bezüge von „Woher“ bis zum richtungsweisenden und offensichtlich wichtigeren „Wohin“ ermitteln lassen: das sich im Entstehen befindende, mit Zeitlichkeit erfüllte Gedicht, ein „Nicht-Ort“=„U-topie“, steuert „ins Offene und Leere und Freie“¹¹ auf jenen nie zu erreichenden „Ort“ des Heils (Eu-topie=Utopie) zu.¹²

Die *Meridian*-Rede eröffnet jedoch bei all dieser atemberaubenden Reflexionsebene auch eine Perspektive ‚talabwärts‘, auf die Celan nicht nur einmal in seinem Briefwechsel mit verschiedenen Korrespondenten hinweisen wird; sie scheint zumal dazu zu dienen, die Frage vom „Woher“ des Dichters und seiner Dichtung beantworten zu wollen. Mit der Erwähnung von Karl Emil Franzos, „unsern halbasiatischen Landsmann“ – wie er ihn nannte –,¹³ lässt Celan halbwegs auf etwas „Konkretes“ blicken: er nennt es schlicht „Heimat“. Von „Heimat“ war auch in einem früheren Brief an den Wiener Freund Klaus Demus die Rede:

Wien, das seit jeher unwirklich Nahe, ist für mich beinahe wieder zu dem geworden, was es lange, schmerzliche Jahre hindurch war: der schmale Streifen Heimat, gesäumt von Unwirklichem und Unmöglichem. Wie seltsam: so wenig Lebenswege in diesem Raum, und dennoch von diesem Raum bestimmt; hinausgeschleudert über seine Grenzen und dennoch ihm zugewandt mit einem ein wenig ungläubigen, aber suchenden Herzen...¹⁴

Die in dem vier Wochen danach gesendeten Brief an Erich Fried heraufbeschworene, dennoch als verloren betrachtete „Mitte“, die ihm einen festen Boden für sein Schaffen anbieten hätte können, lässt sich mithin nicht nur als metaphorische Erwägung einer Stimmungslage – einen anderen Ausdruck für das ‚innere‘ Gleichgewicht – verstehen, sondern sie bekommt ein geographisches Antlitz: eine in Wien konzentrierte kontinentale „Mitte“, von der sich Celan schon einst, in der sich lange mit dem k.u.k. Kronland deckenden Bukowiner Heimat, geistig geformt gefühlt hatte. Anders aber als der ehemalige Czernowitzer Schulkollege und dichtende Partner Immanuel Weissglas, der sich zu erinnern pflegte, wie seine Mutter „alljährlich am 18. August nie vergass, eine brennende Kerze ins Fenster zu stellen, zum Gedenken an den Geburtstag von Kaiser Franz Joseph“,¹⁵ hielt Celan wenig von der von vielen Czernowitzer Juden gepflegten nostalgischen Rückbesinnung auf die vermeintlich tolerante und „judenfreundliche“ Habsburgische Vergangenheit; „Kakanien“ nimmt er lediglich als ein „von viel endgültig Vergangenen überschatteten“ Scherzwort wahr,¹⁶ zumal ihm die „kakanische“ Herkunft eher ein Verhängnis – als unvermeidliche Bestimmung zum Exil – bedeutete.¹⁷

Die geographische Relevanz des Terminus „Mitte“ in Celans Auffassung weist wiederum auf seine Lektüren von Karl Emil Franzos’ *Halbasien*.¹⁸ Ob

Celan sich den Ausdruck Franzos' merkte, den der Autor verwendete, als er sich auf den eigenen galizischen Ursprungsgebiete bezog, die „im Zwielflicht“ deutscher Kultur standen:¹⁹ Die Bukowina stellte jedenfalls für Karl Emil Franzos den besonderen Fall einer Region dar, in der „der deutsche Geist, dieser gütigste und mächtigste Zauberer unter der Sonne“²⁰ es fertig brachte, auf eine Weise zu wirken, die es schaffte, den „Westen“ im Osten einzuwurzeln. Jenseits der Emphase solcher Aussagen, von denen sich ihr Urheber selbst eines Tages distanzieren musste, wuchs auch der Czernowitzer Knabe Paul Antschel, der schon nach dem Anschluss der Bukowina als Staatsbürger Grossrumäniens geboren war, in der Überzeugung auf, er sei „Kind zweier Österreicher“, die ohnehin „nie die rumänische Sprache erlernt haben“;²¹ daraufhin gestaltete er sein Verhältnis zur „rumänischen Umgebung“, wie es in einem Brief an Karl Schwedhelm steht, am „lockersten“, indem er mit dem Paradox zu leben lernte, infolgedessen „das Nahe [...] fern [lag]: dabei konnte man die eigentlichen Entfernungen nur dann messen, wenn man selbst in der Ferne stand“.²² Derartige räumliche Abstände wusste man nicht zuletzt sprachlich zu messen, wie Celan sich einmal zu erinnern meinte:

Wir, daheim in der Bukowina, wir, die wir «Rumänisches» nicht mochten, auch deshalb, weil es uns – uns Juden – die Sprache verbot, die deutsche, auch [Celans Unterstreichung] die Sprache...²³

Das Beharren auf Deutsch als Umgang- und Bildungssprache seitens des jüdischen Bürgertums trotzte den neuen Grenzen; man fühlte sich weiterhin „daheim“ in der europäischen „Mitte“, da die räumliche Semantik sowieso das Wort auf eine viel breitere Gegend als das ehemalige Bukowiner Kronland bezog: Böhmen, zum Beispiel, wo Celans Mutter mehrere Jahre auf der Flucht während des 1. Weltkriegs verbrachte, nahm einen ausserordentlichen Stellenwert in der Familienmythologie ein, denn Friederike Antschel hatte laut dem Sohn erst dort, in der Nähe von Aussig, ihr Deutsch, das sie dem Kind weiterreichen wollte, „aufgelesen“²⁴ – es gefiel Celan, mit dieser Erinnerung zu „spielen“, als er sie mit Shakespeares „Bohemia“ oder überhaupt mit seinen ebenso in diesem Raum zu verortenden Kafka-Affinitäten in Berührung brachte.

Die Zugehörigkeit zu dieser exterritorialen „Mitte“ wurde den Jüngeren aus jenem vorwiegend urbanen Milieu als eine Selbstverständlichkeit weiter tradiert, was in keinem Gegensatz zum Anspruch auf „Bodenständigkeit“ stehen wollte, die je heftiger sie diesen Bürgerlichen schlechthin von der antisemitischen Umgebung untersagt, desto eindeutiger von ihrer Seite behauptet wurde. Der junge Celan, der in seiner Czernowitzer Gymnasialzeit sowohl Rilke als auch Arghezi fleissig las, soll seinem damaligen Kameraden Moshe Barasch zufolge

nicht anders gedacht haben, als er ihm seine Verbundenheit zu einer eigentlich von menschlicher Feindschaft geläuterten Landschaft offenbarte, die er in ihrer frischen Urwüchsigkeit als „poetisch“ und inspirierend empfand²⁵ – mag sein, dass Celan in einem Satz aus einem Brief vom 24. Oktober 1948 gerade darauf anspielte:

*Denn ich glaube, in meiner Einsamkeit, oder gerade durch meine Einsamkeit, manches vernommen zu haben, was diejenigen, die eben erst Trakl oder Kafka entdecken, noch nicht gehört haben.*²⁶

Die „Mitte“, in der er sich mit Trakl und Kafka verwandt fühlte, soll sich ihm in einer Eigenart erschlossen haben, die seiner dichterischen Veranlagung zur Versprachlichung verhalf: z. B. die vertraute Landschaft, die er in den 60er Jahren im Gedicht *Es ist alles anders* wieder aus Erinnerungssplintern herzustellen wagt, deutet unmissverständlich auf eine Quelle der echten, sauberen, unverfälschten poetischen „Stimme“ an. Darin vermischten sich „der Name Ossip“ des wiedergefundenen östlichen „Bruders“ Mandelstam und die mit der „Sprache“ wandernden „böhmischen“ Jahre seiner Mutter mit entfernten Bildern von dem „Land hinterm Berg, hinterm Jahr“;²⁷ die *Walliser Elegie*, die in derselben Zeit entstand und schon in ihrem Titel auf die Rheinquelle der Hölderlinschen Metapher verortend hinweist, sucht wiederum die Bilder „im Buch“ und „unter den Buchen“ auf und entdeckt sie im „Holzgeruch sommers, am Rand / einer Kindheit“, an einer „Sägemühle im Wald“, als „Mauten der Heimat“, die jedoch auch „Maut / hausen“ verkünden; in einer Vorstufe des Gedichts wird „Kronstadt“, „auf den Karpaten -/ kanzeln“ mit dem „Jerusalemstern“ ineins gesetzt – „Kronstadt“ bedeutet für Celan nichts anderes als die „Stadt“ im Land „der Krone“, Czernowitz in der Bukowina.²⁸

In der Stadt, in der Celan Rilke, Trakl und Kafka zu lesen begann, keimte bei ihm auch dadurch das Verlangen auf, weiter in die Mitte der „Mitte“ zu ziehen. „Das Erreichbare, fern genug, das zu Erreichende hiess Wien“, wird er später berichten.²⁹ Vielleicht hing diese Anziehung nicht unwesentlich mit einem Gefühl zusammen, das er in dem berühmten *Solidaritätslied* von Brecht und Hanns Eisler entdeckte, um danach zu streben; der „Czernowitzer Bub“ bekam es anscheinend als „Wiener Lied“ vermittelt, vermutlich um 1934, als die „Roten“ den siegenden „Schwarzen“ einen verbissenen Widerstandskampf lieferten.³⁰ In der Bremer Ansprache wird Celan im nachhinein das Fazit über das am 12. März 1938 zu verzeichnende bittere Ende der Wiener Illusion ziehen: „Sie wissen, wie es dann durch Jahre auch um diese Erreichbarkeit bestellt war.“³¹ 1947 wird er endlich Wien, aber nur als zerstörte und geteilte Stadt erleben; auch wenn es ihm beschieden war, gerade hier seinen Werdegang als

deutschsprachiger Dichter anzufangen, zögerte er nicht zu urteilen, dass in Wien nicht zu finden war, was er „zu finden hoffte“.³² Handelte es sich dabei nur um die Gefahren an der Sektorengrenze zwischen der sowjetisch-östlichen und den westlichen Alliierten gehörenden Besatzungszonen, weswegen er sich weiter nach Westen „hinausschleudern“ liess?³³ Vielleicht am ehesten, auch wenn er im Hintergrund das im Gedichteschreiben vergebens gesuchte und nicht erreichte innere Gleichgewicht meinte! An die europäische „Mitte“ glaubte Celan sich – auch wenn ‚immateriell‘ – immerhin durch die deutsche Sprache der Poeten Rilke und Trakl weiter und fest angeklammert, um sich in ziemlich gekünsteltem Ton als einen „der Letzten, die das Schicksal jüdischer Geistigkeit in Europa zuendeleben müssen“, erklären zu können.³⁴ 1948, als Celan diesen Satz an Verwandte in Israel adressierte, liess er sich noch von einem rhetorischen Reflex jener sich im bürgerlichen Czernowitz angeeigneten Vorstellung treiben, die die deutschsprachigen Juden für die Bürger schlechthin eines vom „deutschen Geist“ geprägten „Kulturraums“ in Mitteleuropa hielt, obwohl es ihm durchaus bewusst war, dass ihre rücksichtslose Vernichtung im Namen rassisch deutscher Reinheit solche Stereotype als Nonsense entlarvte. Das Gespenst, seine Muttersprache mit den mutmasslichen Mördern seiner Mutter teilen zu müssen, schien ihm damals unentrinnbar, denn er empfand die Bestimmung, „deutsche Gedichte schreiben zu müssen“ als sein Schicksal;³⁵ in demselben Brief nach Israel im August 1948 betonte er nochmals, um seine Option gegen einen Ortswechsel zu rechtfertigen, gerade als der neue Staat durch die arabische Belagerung direkt gefährdet war,

*dass es nichts in der Welt gibt, um dessentwillen ein Dichter es aufgibt zu dichten, auch dann nicht, wenn er ein Jude ist und die Sprache seiner Gedichte die deutsche ist.*³⁶

Dass es dabei nicht um unerschütterliche Gewissheiten ging, stellte sich schon in den zögernden Formulierungen Celans im Brief an Erich Fried heraus, was sein eigenes Verhältnis zur besagten ‚geistigen‘ „Mitte“ betraf. Nach wenigen Jahren gestalteten sich bei ihm die Zusammenhänge zwischen den räumlichen und sprachlichen identitätstragenden Merkmalen in einem im Vergleich zu den früheren Äusserungen radikal veränderten Diskurs, der aus den disparaten Erfahrungen der 1950er Jahre, darunter den schmerzlichen Begegnungen mit manchen ihm und seiner Dichtung nicht gewogenen, unbekanntem und bekannten Menschen, hervorging, die ihm besonders seine ‚jüdische Einsamkeit‘³⁷ zu spüren gaben. Die Krise bedeutete nicht nur die dramatische Zurücknahme der einstigen Bekenntnisse – siehe die Tragik der Verse in dem Nachlass-Gedicht *Wolfsbohne*: „Mutter, wessen / Hand hab ich gedrückt, da ich mit deinen / Wor-

ten ging nach / Deutschland?³⁸ – sondern auch eine substanzielle, schon vor etlichen Jahren initiierte Revision der eigenen Poetik, im Sinne der allmählichen Infragestellung einer dichterischen Sprache, die „die Kunst“ in der Nähe der „todbringenden Rede“ blühen liess; seine eigene soll dagegen „durch die tausend Finsternisse“ hindurchgegangen sein, um erst dann „wieder zutage treten“ zu dürfen, «angereichert» von all dem³⁹ Indem jene „Verstellung, Heuchelei und vorsätzliches Vergessen“, von denen laut George Steiner „der Werdegang“ der deutschen Sprache nach dem Krieg gekennzeichnet war, Celan unerträglich wurde, fand er ebenso wie jener, dass sie „nur mit Hilfe der kräftigsten und vollsten Wahrheit gereinigt werden [kann]“:⁴⁰ gerade daraus sollte der „Wahrheitsentwurf“ seiner Poesie auch bestehen.⁴¹ Was Celan in dieser Phase seiner poetischen und ebenfalls selbstbezogenen Reflexion unter „der Mitte meiner Widersprüche“ verstand, wird ausführlich in einem Brief an Erwin Leiser beleuchtet, in dem übrigens auch das existentiell Bestimmende der dichterischen Diktion in „topologischer“ Terminologie übertragen wird. In dem vom Dichter oft erprobten „Gegenlicht“ lassen sich das scheinbar „Exotische“, „Periphere“, „Abseitige“ jener widrigen Erfahrungen, die für ihn zur Substanz der Poesie wurden, ins Zentrale konvertieren, so dass „die Frage nach ihrem sich nicht aufhellbaren Woher“ unmittelbar „in die Tiefe, zur Mitte hin“ hinunter führt.⁴² Ebenso wie die Sprache des Gedichts, „die nicht zu verklären, sondern zu klären und sichtbar zu machen versucht“,⁴³ damit es „immer nur in seiner eigenen, allereigensten Sache“ spricht, wird auch die neu entdeckte dichterische „Mitte“ umgestaltet, sie von ihrer verborgenen „Tiefe“ an die sichtbare Fläche des Textes gebracht und vom Dichter „unter dem Neigungswinkel seines Daseins“⁴⁴ wieder besetzt.

DIE DURCHLEBTE Identitätswandlung fasste Celan kurz in einem Satz aus einem Brief an Friedrich Torberg zusammen: „Meine eigene Nase ist auch erst seit kurzem so krumm“,⁴⁵ der eigentlich einen Vers aus dem symbolischen Gedicht *Eine Ganner- und Ganovenweise gesungen zu Paris emprès Pontoise von Paul Celan aus Czernowitz bei Sadagora*⁴⁶ anschliesst: Was in diesem langen Titel sofort auffällt, ist die erneute Anspielung auf das existentielle Hin- und Herschwingen zwischen entgegengesetzten Polen, die hier ironisch in einer geographisch ziemlich skurrilen Repräsentation der „Peripherien“ genannt werden. Die angestrebte „Mitte“ lässt sich in dem weiten ost-westlichen Raum um die „Lutetiae Czernowitiorum“,⁴⁷ einem fluiden, flexiblen und stets verhandelbaren „Third Space“ von Mehrdeutigkeiten erraten.⁴⁸

Ungemein signifikant für den Celanschen Gedankenablauf jener Jahre erweist sich die erweiterte Polarisierung Czernowitz/Sadagora; am Scheideweg zwischen den beiden symbolisch beladenen Orten im Bukowiner Kleinraum, einerseits der

weltlichen Provinzmetropole, mit ihren vielen deutschsprechenden, bürgerlich-assimilationswilligen Juden, andererseits des *Stetls* über den Fluss Pruth, in dem die Nachkommen des Wunderrabbis aus Rhyzin inmitten ihrer chassidischen Verehrerschar residierten⁴⁹ und wo auch Celans Mutter, die Deutschsprechende, geboren war, wollte der Dichter nochmals jene lebensbestimmenden Modelle illustrieren, die sein geistiges Selbstverständnis konkurrierend formten. Auf der unablässigen Suche nach einer „trotz allem“ stabilen, das Werk fördernden „Mitte“, versprach die jetzige Option ein nochmaliges Überdenken jenes Dualismus, sobald ihm das Scheitern einer übermässigen Investition in der Franzos'schen Fata Morgana des Westens im Osten durch seine eigene bisherige Erfahrung unvermeidlich und unglücklich bestätigt vorkam. 1969 fühlte er sich ratlos bei der Lesung in Tel Aviv, als die ehemaligen Czernowitzer mit ihrem „Miss- und Unverständnis“ vor ihm sassen. Das für ihn unheimliche Bild von Überlebenden, die trotz des erlittenen Leides inmitten Israels die bürgerlichen Rituale einer hohlen Deutschsprachigkeit pflegten, konnte ihm wahrscheinlich auch als groteske Steigerung jenes tragischen Missverständnisses vorkommen, zu dem die trügerische Illusion einer „deutsch-jüdischen“ Kultursymbiose in Zentraleuropa geführt hatte:⁵⁰ Celan konnte und wollte derartige Chimären nicht mehr mittragen: der einst im Geiste einer symbolischen „Germania Judaica“ Ausgebildete, „grossgeworden“ sowohl mit dem „Hebräischlernen“ als auch „mit so bartlosen Gestalten [...] wie Siegfried und die Nibelungen“, erinnerte sich, dass der in Sadagora lebendige Chassidismus ihm „vielmehr näher kam [...] erst, als ... es schon verloren war, verloren und entrückt“. Und dennoch: „man *ist* Jude“.⁵¹

Die „Mitte“, die Paul Celan konsequent auch topologisch „zu Ende denken“ mochte, blieb ihm immer wichtig – er achtete nur peinlich darauf, in ihm selbst und in den Gedichten die Ausgewogenheit zwischen ihren diskrepanten, gegenteiligen Komponenten zu bewahren und gleichzeitig diese unvermeidlichen Disharmonien sprachlich zu exponieren: dasselbe Ringen veranlasst ihn, auf die Gegensätze hinzuweisen, wenn er Heinrich Böll mitteilt, dass er, der von „hinter den Bergen“ in einer „der Kapitalen des Abendlandes“ Gelandete, wiederum „mehr und mehr“ veröstlicht,⁵² oder Nelly Sachs darauf aufmerksam macht, dass „bei uns in Czernowitz“ das übliche „Sei gesund“ keine deutsche, sondern eine jiddische Wendung sei⁵³ – andererseits bemerkt er ebenfalls, dass die Donau, der ‚mitteleuropäische‘ Fluss par excellence, aus der besagten Provinz „hinter den Bergen“ auch das Wasser ihrer „östlichsten Nebenflüsse“ bekommt.⁵⁴ Diese seine „Landschaft“, deren „chassidische Geschichten“ von Martin Buber auf Deutsch erzählt wurden, weiss er nicht minder gegen die Exzesse seitens rumänisch-völkischer Visionen von der Bukowiner Gegend als rückbesinnt mythologisierender Naturidylle in Schutz zu nehmen,⁵⁵ als er sie mit seinen „Menschen und Büchern“ bevölkerte. Die Tatsache, dass Celan damit

gut ins paradigmatische „Phantombild“ des Mitteleuropa-Dichters, so wie es der österreichische Kulturhistoriker Moritz Csáky unlängst entworfen hatte,⁵⁶ liegt nicht nur an den früh verinnerlichten Gemeinsamkeiten mit Kafka, sondern geht aus der eigenen Erfahrungskonstellation hervor, deren kartographischen Ausdruck der *Meridian*-Autor nicht umsonst in der „Mitte“ Europas ansiedelte. Die poetische Praxis Celans zeugte dabei grundsätzlich von einer Konzeption der sprachlichen Hybridität, die er in den eigenen lyrischen Duktus anhand der eigentümlichen, „mittig“ aufgestellten Verflochtenheit zwischen dem geistig erdenklichen „Okkzident“ und „Orient“ mehr und mehr durchzusetzen wusste – weswegen ihn etwa die Frage beschäftigte, ob die Übersetzer das Jüdische in seinem dichtenden Deutsch wahrnehmen.⁵⁷ Vielleicht um auch auf diese Weise den Auslöser seiner „dunklen“ Poesie aufzuhellen, hörte Paul Celan „aus Czernowitz bei Sadagora“ – der wie Joseph Roth zu meinen neigte, dass das „Wesen“ der „Mitte“ nicht „Zentrum, sondern Peripherie“ sei⁵⁸ – in der Bemühung nicht auf, „namhaft zu machen, was [...] keinen Namen hatte, zu erörtern, was [...] Ortlosigkeit war“.⁵⁹



Anmerkungen

1. Paul Celan: Brief an Erich Fried von 12.1.1952. In *Paul Celan: «etwas ganz und gar Persönliches». Briefe 1934-1970*. Ausgewählt, herausgegeben und kommentiert von Barbara Wiedemann. Berlin: Suhrkamp 2019 (weiterhin zitiert unter *Briefe 1934-1970*), S. 109-110.
2. Paul Celan: Ansprache anlässlich der Entgegennahme des Literaturpreises der Freien Hansestadt Bremen (weiterhin zitiert unter *Ansprache*). In Paul Celan: *Gesammelte Werke in sieben Bänden*. Herausgegeben von Beda Allemann und Stefan Reichert unter Mitwirkung von Rolf Bücher. Dritter Band. Frankfurt am Main: Suhrkamp 2000, S. 185-186, hier 186.
3. Anm. 1, S. 110.
4. Paul Celan: *La bibliothèque philosophique*. Catalogue raisonné des annotations établi par Alexandra Richter, Patrik Alac, Bertrand Badiou. Paris: Éditions Rue d’Ulm 2004, S. 451.
5. Paul Celan: *Der Meridian. Endfassung, Vorstufen, Materialien*. Herausgegeben von Bernhard Böschstein. Tübinger Ausgabe. Frankfurt am Main: Suhrkamp 1999, S. 10 (weiterhin zitiert unter TA).
6. Celan: *La bibliothèque philosophique* (Anm. 4), S. 377. Den Begriff *In-der-Welt-sein* übernahm Celan von Martin Heideggers *Sein und Zeit*, das er seit dem Frühjahr 1952 las. Vgl. Bertrand Badiou: Chronologie. In *Paul Celan/Gisèle Celan-Lestrange: Correspondance*. Éditée et commentée par Bertrand Badiou avec le concours d’Eric Celan. Bd. II. Paris: Seuil 2001, S. 492.

7. Celan: *La bibliothèque philosophique* (Anm. 4), S. 364.
8. Badiou: Chronologie (Anm. 6), S. 492.
9. TA, S. 73.
10. Ebd., S. 102.
11. Ebd., S. 10.
12. Vgl. u.a. Thomas Schölderle: *Utopia und Utopie. Thomas Morus, die Geschichte der Utopie und die Kontroverse um ihren Begriff*. Baden-Baden: Nomos 2011.
13. Paul Celan: Brief an Georg Drozdowski von 17.10.1960. In : *Briefe 1934-1970*, S. 470.
14. Paul Celan: Brief an Nani Maier und Klaus Demus von 15.12.1951. In *Briefe 1934-1970*, S. 106.
15. Gerhart Baumann: Dank an die Sprache. Erinnerungen an Immanuel Weißglas. In Derselb.: *Umwege und Erinnerungen*. München: Wilhelm Fink 1984, S. 49-62, hier 50.
16. Paul Celan: Brief an Karl Schwedhelm von 6.11.1952. In *Briefe 1934-1970*, S. 137.
17. Paul Celan: Brief an Hans Weigel von 26.03.1960. In *Briefe 1934-1970*, S. 416.
18. Brigitta Eisenreich: *Celans Kreidestern. Ein Bericht*. Berlin: Suhrkamp 2010, S. 143 f.
19. Karl Emil Franzos: *Aus Halb-Asien. Kulturbilder aus Galizien, der Bukowina, Süd-russland und Rumänien*. Leipzig: Duncker & Humblot 1876, S. IV.
20. Ebd., S. 113.
21. Paul Celan: Brief an Max Rychner von 24.10.1948. In *Briefe 1934-1970*, S. 46. Allerdings gibt es unter den vorbereitenden Materialien für die *Meridian*-Rede in Darmstadt eine Notiz, laut der ihr erster Satz sehr deutlich angeben sollte, dass „ich [...] ein verspätetes Kind des alten Österreichs [bin]“. Vgl. TA, S. 185.
22. Paul Celan: Brief an Karl Schwedhelm (Anm. 28), S. 137.
23. Paul Celan: Brief an Edith Hübner von 29.07.1965. In *Briefe 1934-1970*, S. 720.
24. Im französischen Original „cueillie“ – vgl. in Paul Celan: Entwurf eines Briefes an Nina Cassian von 6.11.1952. In *Briefe 1934-1970*, S. 585. Vgl. auch im selben Band Briefe an Reinhard Federmann und Klaus Wagenbach, in denen auf das Refugium seiner Familie mütterlicherseits in Böhmen während des 1. Weltkriegs angespielt wird. Für Brigitta Eisenreich war die deutsche Sprache, die Celan bei seiner Mutter lernte, schlicht *lingua austriaca*. Vgl. Brigitta Eisenreich: *Celans Kreidestern* (Anm. 18), S. 44.
25. Moshe Barash über Paul Celan. Interview von Cord Barkhausen. In *Sprache und Literatur in Wissenschaft und Unterricht*. Nr. 55 (1985), S. 93-107. Vgl. auch Andrei Corbea-Hoisie: *Paul Celans «unbequemes Zuhause»*. Sein erstes Jahrzehnt in Paris. Aachen: Rimbaud 2017, S. 9 f.
26. Paul Celan: Brief an Max Rychner (Anm. 33), S. 46.
27. Celan: *Gesammelte Werke* (Anm. 2). Erster Band, S. 284-286.
28. Ebd. Siebter Band (Die Gedichte aus dem Nachlaß). Herausgegeben von Bertrand Badiou, Jean-Claude Rambach und Barbara Wiedemann, S. 71-74.
29. *Ansprache* (Anm. 2), S. 185.
30. Paul Celan: Die Wahrheit, die Laubfrösche, die Schriftsteller und die Klapperstörche. In Robert Neumann (Hrsg.): *34xerste Liebe. Schriftsteller aus zwei Generationen*

unseres Jahrhunderts beschreiben erste erotische Erlebnisse. Frankfurt am Main: Bärmeier & Nickel 1966, S. 32.

31. *Ansprache* (Anm. 2), S. 185.
32. Paul Celan: Brief an Karl Schwedhelm (Anm. 28), S. 137.
33. Paul Celan: Brief an Nani Maier und Klaus Demus (Anm. 26), S. 106.
34. Brief Paul Celans von 2. August 1948 an Verwandte in Palästina. Zitiert nach Bianca Rosenthal: Quellen zum frühen Celan. In *Monatshefte*, Vol. 75, H. 1 (1983), S. 403.
35. Paul Celan: Brief an Max Rychner von 3.11.1946. In *Briefe 1934-1970*, S. 27.
36. Brief Celans an Verwandte in Palästina (Anm. 34), S. 403.
37. Paul Celan: Brief an Karl Schwedhelm (Anm. 28), S. 137.
38. Paul Celan: *Gesammelte Werke* (Anm. 2). Siebenter Band (Anm. 41), S. 45-48.
39. *Ansprache* (Anm. 2), S. 186.
40. George Steiner: Das hohle Wunder. In *Sprache im technischen Zeitalter*, Nr. 6 (1963), S. 431-449, hier 448.
41. Paul Celan: Brief an Werner Weber von 26.03.1960. In *Briefe 1934-1970*, S. 427.
42. Paul Celan: Brief an Erwin Leiser von 15.04.1958. In *Briefe 1934-1970*, S. 302.
43. Ebd.
44. TA, S. 9.
45. Paul Celan: Brief an Friedrich Torberg von 23.02.1961. In *Briefe 1934-1970*, S. 492.
46. Paul Celan: *Gesammelte Werke* (Anm. 2). Erster Band, S. 229-230.
47. Diese Formel wird von Celan mehrmals in der Zeitspanne, in der er an dem Gedicht arbeitete, in Briefen verwendet: z. B. in jenem an Reinhard Federmann von 3.03.1962 oder an Klaus Wagenbach von 7.07.1962. Vgl. *Briefe 1934-1970*, S. 573, 592.
48. Moritz Csáky sieht Homi Babhas Konzept als durchaus geeignet, um damit den „kommunikativen Raum“ Zentraleuropas zu beschreiben. Vgl. Moritz Csáky: *Das Gedächtnis Zentraleuropas. Kulturelle und literarische Projektionen auf eine Region.* Wien/Köln/Weimar: Böhlau 2019, S. 34-36.
49. Vgl. u.a. Andrei Corbea-Hoisie: Israel Friedman (Israel der Ruzzyner). In Joachim Bahlke, Stefan Rohdewald, Thomas Wunsch (Hrsg.): *Religiöse Erinnerungsorte in Mitteleuropa.* Berlin: Akademie Verlag 2013, S. 749-756.
50. Zur symbolischen Identifikation der deutschsprachigen Juden Zentraleuropas mit einer eigentlichen grenzübergreifenden Nation der Habsburgischen Monarchie vgl. Jacques Le Rider: *La Mitteleuropa.* Paris: PUF 1994, S. 75-78. Vgl. auch Andreas Herzog: Deutsche, Juden oder Österreicher? Zum nationalen Selbstverständnis deutschsprachiger jüdischer Schriftsteller in Prag. In Hanni Mittelman & Armin Wallas (Hrsg.): *Österreich-Konzeptionen und jüdischer Selbstverständnis.* Tübingen: Max Niemeyer 2001, S. 141-160, hier 144.
51. Paul Celan: Brief an Friedrich Torberg (Anm. 61), S. 492.
52. Paul Celans Brief an Heinrich Böll von 23.06.1962. In *Briefe 1934-1970*, S. 596.
53. Paul Celans Brief an Nelly Sachs von 4.05.1961. Ebd., S. 507.
54. Paul Celans Brief an Ianko von Musulin von 6.02.1964. Ebd., S. 662.
55. In einem Brief an den rumänischen Exil-Journalisten Virgil Ierunca, den Celan noch in Bukarest kennengelernt hatte und mit dem er in den 1950er Jahren in Paris öfters verkehrte, distanzierte er sich offensichtlich von dem idyllischen und ahistorischen

Bild eines rumänisch-nationalen „eden bucovinien, d’ont j’ai connu [...] la couleur et l’étendue“, ein Bild, das dieser mit dem Werk des rechtsextremen Bukowiner Schriftstellers Mircea Streinul assoziierte – die Erwähnung Streinuls, der sich für die Eiserner Garde politisch engagierte, kann als eine sehr deutliche Anspielung auf die katastrophalen Konsequenzen dieser Kulturvision für die dort lebenden Menschen gelten. Vgl. Paul Celans Brief an Virgil Ierunca von 24.01.1965. In *Briefe 1934-1970*, S. 693.

56. Vgl. Moritz Csáky: *Das Gedächtnis* (Anm. 48).

57. Celan soll diese Frage an seinen amerikanischen Übersetzer Jerome Rothenberg während eines Treffens in Paris gestellt haben. Vgl. Thomas Sparr: *Todesfuge. Biographie eines Gedichtes*. München: Deutsche Verlags-Anstalt 2020, S. 152 f.

58. Diese Behauptung befindet sich im 5. Kapitel des Romans *Die Kapuzinergruft*.

59. Paul Celans Brief an Gideon Kraft von 7.05.1968. In *Briefe 1934-1970*, S. 813.

Abstract

“The Center that always reacquires me”:

Paul Celan’s Agonizing Vacillation between Center and Periphery

Drawing on a significant number of testimonies—correspondence, memoirs, the actual poetic texts—we investigate a concept of existential value for the poet Paul Celan, that of ‘Mitte’ (Center). For him, this is not only the utopian projection of the balance of that ‘Atemwende’ (breathturn) which bestows creative power upon language, but also the locus of identity within a symbolic geography centered around the “mother” tongue, German, restructured in his own poetic idiom against the grain of the “language of the killers” of both his mother and his world.

Keywords

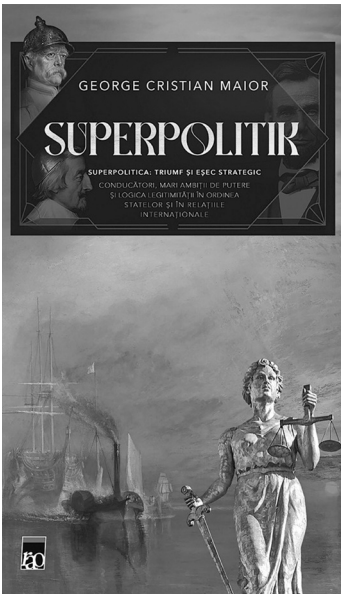
Paul Celan, Central Europe, Cernăuți/Czernowitz, utopia, mother tongue, Celan’s poetic idiom

EDITORIAL EVENTS

A New Concept in the Study of International Relations: Superpolitics

IOAN BOLOVAN

<https://doi.org/10.33993/TR.2024.4.10>



GEORGE CRISTIAN MAIOR, Superpolitik: Triumf și eșec strategic: Conducători, mari ambiții de putere și logica legitimității în ordinea statelor și în relațiile internaționale
Foreword by Academician IOAN-AUREL POP
Bucharest: Editura RAO, 2024

THE NAME of Professor George Cristian Maior, Ph.D., is familiar not only to specialists, but also to the general public, as the current ambassador of Romania to the Hashemite Kingdom of Jordan (previously a successful ambassador of Romania to Washington, between 2015 and 2021) is an outstanding personality of our public life. He is a tenured professor at the National School of Political and Administrative Studies, the Department of International Relations and European Integration. Over the course of the past few decades, George Cristian Maior completed thorough theoretical studies at Babeș-Bolyai University of Cluj-Napoca and at George Washington University in the United States, also acquiring a comprehensive practical experience in the field of international law and international relations in the performance of his duties (chargé d'affaires ad interim of the Romanian Embassy in Dublin, Ireland, secretary of state and head of the

Ioan Bolovan

Corresponding member of the Romanian Academy, professor at Babeș-Bolyai University, director of George Barițiu Institute of History, Cluj-Napoca.

Department for Euro-Atlantic Integration and Defense Policy of the Ministry of National Defense, where he competently conducted the negotiations for Romania's accession to NATO, between 2001 and 2004). Last but not least, he was also one of the longest-serving directors of the Romanian Intelligence Service. Beyond the responsibilities and the duties fulfilled in the framework of governmental institutions, Professor George Cristian Maior, Ph.D., has also carried out a significant didactic and scholarly activity. His CV lists a large number of books that he authored or co-authored, collective volumes that he coordinated, as well as dozens of studies published in collective volumes or in prestigious magazines from all over the world, without forgetting the dozens of conferences held at universities and distinguished institutions in both Europe and the USA.

In this context, we should mention here the fact that the present book did not appear out of the blue, coming instead in the wake of some older reflections on the evolution of international relations over the past few centuries, formulated by a theorist who is also a practitioner with remarkable achievements in the field. A previous book, *Noul Aliat: Regândirea politicii de apărare a României la începutul secolului XXI* (The new ally: Rethinking the Romanian defense policy at the beginning of the 21st century)(2nd edition, rev. and enl., 2012), brings together studies, articles and presentations drawn up or made at the time of Romania's accession negotiations to the EU and NATO, focusing on a number of aspects pertaining to the new strategic identity of Romania after the year 2000 and to the geopolitical developments in the region of the Black Sea and Southeast Europe. The area in question and the problematic thereof have always occupied a privileged position among the scholarly concerns of George Cristian Maior. He has investigated the changes experienced by the field of national security, by defense policies and strategies, drawing on the work of reputed authors such as Robert Cooper and Robert Kaplan, whose assessment of the international challenges of the 21st century is still highly relevant. In a later book, titled *Incertitudine: Gândire strategică și relații internaționale în secolul XXI* (Uncertainty: Strategic thinking and international relations in the 21st century)(3rd edition, 2015), George Cristian Maior objectively and rationally reassesses the doctrines and the concepts underpinning international relations, in light of the security challenges posed at the dawn of the third millennium by terrorist groups or by rogue states that generate local tensions and clashes which could potentially spread over larger geographic areas.

Just like the previous works, the present book authored by Professor George Cristian Maior, *Superpolitik: Superpolitics: Triumph and Strategic Failure: Leaders, Vaulting Ambitions and the Logic of Legitimacy in State Order and International Relations*, draws on a large number of historical sources, on an updated specialist bibliography, featuring interpretations that are always supported by

scholarly and/or logical arguments. In a combination between a wealth of information on world and Romanian history and the good theoretical and practical knowledge in the fields of diplomacy and strategy, the present volume comes as a certain and valuable contribution to the unbiased and accurate investigation of the history of international relations. The new concept advanced by the author, *superpolitics*, is an innovation when it comes to the analysis and interpretation of the dynamics of the international system. With the help of case studies, George Cristian Maior explains the emergence of a particular great state/power/leader, what the states or leaders in question actually were, and what their supporters created around them. Individual character as well as specific circumstances/opportunities led to the emergence of leaders in crisis moments, who exercised their charisma and personal power over the communities that engendered them, within various political regimes and ideologies. The author manages to identify the mechanisms behind the power wielded by several leaders who influenced the lives of their fellow citizens, placing these more or less positive figures in the context of the crises, upheavals, and wars that not only caused tremendous human or material losses but also eroded the international system.

The first chapter outlines the new concept of *superpolitik*, bringing it into the specialist world literature. George Cristian Maior defines *superpolitik* as a special exercise in the application of power, distancing himself from the two opposing paradigms employed over the past decades by the specialists in international policy: *realpolitik* and *idealpolitik*. Thus, the author explains the differences between *realpolitik* and *superpolitik* as having to do with the fact that

realpolitik entails a method or a philosophy of effecting a policy or a strategy based on a careful assessment of the balance of power, of the possibilities for action, in keeping with the resources and the objectives provided by the immediate reality. On the other hand, superpolitik often comes to include imbalances and fractures (deliberate or incidental) which can dramatically transcend the context of the current realities—political, strategic, or economic—and is aimed as the creation of a new order, of other types and models of balance. At the same time, as we are about to see, superpolitik is not just about power and the calculations thereof, about pure strategy, as it also includes concepts and ideas of legitimacy, justice, ethical models, ideologies, likely to bestow another qualitative dimension upon political order. (p. 8)

The experience acquired in his various positions at national and international level, combined with the in-depth study of the specialist literature, have allowed the diplomat and scholar George Cristian Maior to conceptually distance himself from both *realpolitik* and *idealpolitik*, which are nevertheless melded into an integrative approach.

The research skills and abilities displayed by Professor George Cristian Maior prove that he is one of the leading experts in the history of international relations, especially when it comes to the Euro-Atlantic space. His many books, studies and communications indicate that we are dealing with a scholar whose work is known and appreciated not just among Romanian specialists, but also abroad. The considerations of the illustrious political scientist George Friedman or of historian Edward N. Luttwak come to confirm the intellectual and managerial qualities, as well as the innovative approach of Professor George Cristian Maior, whose latest book shows that new paradigms can be formulated when approaching the history of international relations, and that new interpretative and methodological approaches are likely to shed new light on the historical evolution of states. Relevant in this regard is the testimony of Edward N. Luttwak:

George Maior's book questions a number of concepts widely accepted in political science (international relations included), proving that the concrete developments around the world are also the outcome of the objectives, fears, knowledge, ignorance and delusions of individual leaders, and not only of systemic or local tendencies.

Starting from the undeniable historical reality of an international system that has been extremely dynamic and complicated, especially in recent decades, Professor George Cristian Maior contends that, for obvious reasons, the current historians of international relations are no longer capable of describing this increasingly complex reality in the conventional terms of the specialist literature. Therefore, the author draws on nearly all the recent developments in political science, in the anthropology and the sociology of international relations, and even in the history of collective mentalities, his book presenting us with a new theoretical and methodological construct surrounding the notion proposed by him, that of *superpolitik*. The author has never intended to write a fact-based, positivist history of international relations and of the power structures around the world, favoring instead a conceptual and structural approach centered on the feelings and attitudes displayed by political leaders (without overlooking Nicolae Ceaușescu), on the events and phenomena that influenced the behavior of both politicians and the masses. Thus, Professor George Cristian Maior challenges us to an unconventional but highly captivating and fruitful interpretation of many pages of world history, from Antiquity to the contemporary reality. □

BOOK REVIEWS

IOAN BOLOVAN and RUDOLF GRÄF, eds.

Istoria Banatului: Compendiu

(A history of Banat: A compendium)

2nd edition, rev. and enl.

Commendation by Acad. IOAN-AUREL POP

Foreword by Acad. DAN DUBINĂ

Cluj-Napoca: Centrul de Studii Transilvane;

Editura Școala Ardeleană, 2023

IN 2023, Timișoara held the honorable title of “European Capital of Culture,” which occasioned the organization of numerous artistic, cultural, musical, scientific-academic and spiritual-religious events intended specifically to illustrate and popularize the rich cultural heritage of Timișoara in particular and of the Banat region in general. The dynamics of this pursuit to rediscover and highlight the beauty of this European and local cultural capital would have been incomplete without the historians and without specialized historiography in Romanian and German, representing two of the four great cultures that have left a fundamental mark on the historical development of the city on the Bega River and of the region between the Danube, the Tisza, the Mureș, and the Southern Carpathians. Thus, in the first half of the year 2023, the following volumes were issued by the Friedrich Pustet publishing house of Regensburg: *Kleine Geschichte des Banats: Umkämpfte Grenzen im östlichen Europa*, by Irina Marin of Utrecht University, and *Temeswar/Timișoara: Eine kleine Stadtgeschichte*, by historians Konrad Gündisch and Tobias Weber, both aimed

at the German-speaking general public eager to (re)discover the history of Timișoara and of the border region of Banat, located at the confluence of several cultures, religious denominations, ethnic groups and states in Southeast Europe.

To their credit, contemporary historians from Banat and Transylvania did not fail to keep up with their abovementioned Western-European colleagues and, under the coordination of Professors Ioan Bolovan and Rudolf Gräf of Babeș-Bolyai University of Cluj-Napoca, who are also directors of the George Barițiu Institute of History of Cluj-Napoca and of the Romanian Academy’s Institute of Social Sciences and Humanities in Sibiu, created the first compendium of its kind, i.e., a synthetic exposition of the history of Banat from Antiquity to contemporary times. It is precisely in this scholarly enterprise that the originality or novelty of the historiographical-editorial project lies, namely, in the fact that it is the first synthetic, unitary presentation in Romanian of the history of Banat from ancient times up to the present, the compendium being mainly intended for the general public and less so for specialists, whose representatives are very well acquainted with the rich and diverse historical literature, both old and new, available in Latin, German, Romanian, Serbian, and Hungarian, which depicts well-defined and clearly outlined historical eras and periods, with a clear predilection for Roman Antiquity (thanks to the efforts of Banat archaeologists) and the Modern Era, marked by the major transformations

generated by the integration of Banat into the Habsburg Monarchy. The compendium was published under the patronage of the Timișoara branch of the Romanian Academy, in two editions, in the spring and summer of 2023, thanks to the concerted efforts of the Center for Transylvanian Studies and the Școala Ardeleană publishing houses of Cluj-Napoca, printed in impeccable graphic conditions with the financial support of several public, administrative and cultural institutions of the counties of Arad, Timiș, and Caraș-Severin, three territorial-administrative units of the historical region of Banat. It is no coincidence that the compendium is dedicated to the memory of the late Professor Nicolae Bocșan of Banat, “distinguished historian, school founder, mentor, one of the foremost promoters of the history of Banat,” whose guidance shaped the training not only of the two editors, but also of some of the authors of the chapters, as well as of other historians, museographers, archivists, and teachers from Transylvania and Banat.

In the commendation and in the foreword to the compendium, Academicians Ioan-Aurel Pop and Dan Dubină point out the importance, relevance and novelty of the volume for the Romanian readers of today, as well as the place that Banat and its inhabitants occupy in the history of Romanians and Romania, and so do the two editors in their foreword addressed to the readers. The latter two argue the need for the creation of such a volume in 2023, then move on to emphasize the text’s broad scope and sketch the portraits of the contributors, along with the profiles of the institutions where they conduct their activities, followed by a brief introduction into the historiography of modern Banat (18th–19th century), a period depicted by

Romanian, German, Serbian, Jewish and Hungarian historians, whose works, cited in this volume as well, make for valuable contributions to the knowledge of the history of the region and its inhabitants from the 18th to the 20th century.

The volume is divided into nine sections, each with its own chapters and sub-chapters, dedicated to different historical eras and developments, all illustrated with maps, images, old and new photographs of the highest quality, representing landscapes, settlements, personalities, objects, and buildings from the history of Banat, which are particularly useful to readers with varying degrees of familiarity with the geographical, archaeological, historical, demographic, architectural, artistic, urban and rural realities of the region. Last but not least, the chapters are followed by a detailed bibliographical list, where the reader can find specialized literature providing in-depth information on the subjects and periods discussed.

Section I, “The Natural Environment” (pp. 35–47), is written by Petru Urdea, a professor at the West University of Timișoara, who highlights the physical and geographical landmarks of the region, describing the landforms, climate, hydrography, vegetation, and soils of Banat. Section II, “Banat in Antiquity (Up to ca. 400 AD)” (pp. 49–140), comprises three chapters: “Banat Up to the Dacians,” “The Dacians in Banat” and “The Romans in Banat,” written by two internationally and nationally recognized specialists from Banat: Florin Drașovean, professor at Babeș-Bolyai University of Cluj-Napoca and researcher at Titu Maiorescu Institute of Banatian Studies in Timișoara, and Adrian Ardeț, archaeologist and researcher at the same academic institute of Timișoara. Sections III, “The

Early Migrations (5th–6th Century)” (pp. 141–159) and IV, “The Crystallization of Medieval Society (6th–10th Century)” (pp. 161–183) are written by Daniela Tănase, archaeologist at the National Museum of Banat in Timișoara. The medieval period, titled “Section V. Medieval Banat (1000–1715)” (pp. 185–282), is tackled by two of the best contemporary medievalists in Banat, spouses Adrian and Livia Magina, who carry out their research at the West University of Timișoara, at the Institute of Banatian Studies, and at the Banat Mountain Museum in Reșița, and comprises the following sub-chapters: “Banat in the Kingdom of Hungary: Political and Historical Evolution,” “Administrative Structures,” “Banat’s Defense System,” “Habitat and Population,” “Society,” “Urban Networks, Trade and Economy,” “The Impact of Culture and Civilization Models: Church and Culture,” and “Banat in the Ottoman World.” Section VI presents “Modern Banat (1716–1918)” (pp. 283–385) across two large chapters: “Imperial Banat (1716–1778)” and “Banat in the 19th Century,” written by Professor Rudolf Gräf and Sandra Hirsch, research assistant at the West University of Timișoara. They capture the modernization of the region under the tutelage of the House of Habsburg, presenting demographic, economic, administrative, religious, educational and artistic developments, followed by the organization of the Military Border and by the national, revolutionary and workers’ movements of the second half of the 19th century. Section VII presents the historical developments of the 20th century under the title “Contemporary Banat” (pp. 387–541), comprising two main chapters: “The Interwar Period: The Second World War and the Establishment of Communism,” written by Vasile

Râmneanțu, a lecturer at the West University of Timișoara, and “The Postwar Period: The December 1989 Revolution: The Timișoara Moment: Post-Revolution Developments in Banat,” by Miodrag Milin, researcher at the Romanian Academy’s Institute of Banatian Studies in Timișoara. Section VIII brings to the attention of contemporary readers the biographies of 27 “Emblematic Personalities of Banat” (pp. 543–630), hailing from all the ethno-cultural and religious environments of the historical communities of Banat, who left their mark on the region’s history, culture, music, art, literature, historiography, and science from their Romanian, German, Serbian, Hungarian, Jewish and European perspectives, from the Middle Ages (Paul Kinizsi), through modernity (Vincențiu Babeș, Damaschin Bojincă, Traian Doda, Adam Müller-Guttenbrunn, Nikolaus Lenau, Constantin Diaconovici Loga, Felix-Bódog-Srećko Milleker, Alexandru Mocioni, Eftimie Murgu, Dositej Obradović, Zsigmond Ormós, Dimitrie Țichindeal, Traian Vuia) and all the way up to present day (Béla Bartók, Ana Blandiana, Sever Bocu, Elie Miron Cristea, Constantin Daicoviciu, Stefan Walter Hell, Ioan Holender, Ștefan Jäger, Romul Victor Ladea, Herta Müller, Augustin Pacha, Johnny Weissmüller, Phoenix). These biobibliographical miniature portraits are compiled by the abovementioned authors, alongside Ioan David, who represents the library of the Timișoara branch of the Romanian Academy, the late Professor Corneliu Pădurean of the Aurel Vlaicu University of Arad, and historian Doru Sinaci of Arad. The final section provides an extremely useful “History of Banat in Chronological Dates” (pp. 631–676), listing the main “chronological benchmarks,” organized into major eras or periods of

European and Banat history: “I. The Pre-historic Era” (Paleolithic–Iron Age); “II. Antiquity” (5th century BC–mid-5th century AD); “III. The 5th–10th Centuries” (the Migration Period); “IV. The Medieval Era” (10th–18th century); “V. The Modern Era (1718–1918)”; “VI. The Contemporary Era (1919–1944)”; “VII. The Contemporary Era (1945 to the Present).”

The chronological section is compiled by Alexandru Kósa, scientific researcher at Titu Maiorescu Institute of Banatian Studies, and by Tatiana Ostroveanu of the Iris Special Theoretical High School in Timișoara.

The volume *A History of Banat: A Compendium*, published in 2023, at a time when Timișoara was the European Capital of Culture, emerges as a new calling card for the history of that province geographically outlined by the Danube, the Tisza, the Mureș, and the Southern Carpathians. The work is coordinated by two nationally and internationally acknowledged modernist historians and written in a clear language accessible to the general public by 15 specialists (geographers, archaeologists, historians) pertaining to different generations, ethnicities, and schools of historiography, brought together by a shared passion for the fascinating history of Banat from Prehistory and Antiquity, through the Migration Period and the Middle Ages, all the way to modernity and the contemporary times. In time, by expanding the number of specialists and detailing the historical eras, the synthesis now proposed to the Romanian reader may become a monograph which can be the starting point of a genuine treatise on the history of Banat, a desirable goal proclaimed by historians and scholars from Banat in the last three decades.

□

MIRCEA-GHEORGHE ABRUDAN

ANDREI CORBEA-HOIȘIE and RUDOLF GRÄF, eds.

Limbă și cultură germană în România (1918–1933): Realități postimperiale, discurs public și câmpuri culturale

(German language and culture in Romania, 1918–1933: Post-imperial realities, public discourse and cultural fields)

2 vols. Iași: Polirom, 2023

THE WORK we briefly present below is the result of a comprehensive research project conducted by a group of renowned specialists (historians, linguists, etc.) from both Romania and abroad, addressing an extremely complex topic, namely, the German language and culture in Romania (1918–1933). Based on two key concepts of cultural studies, “intercultural communication” and the “contact between cultures,” the authors chose to investigate the relationships between Romanian and German culture by presenting and analyzing some specific historical events or processes. The existence of a significant number of connections between the two cultures entailed the study and analysis of both individual and collective communication networks, as well as the identification of the factors that underpinned the flows of cultural “transfer,” “import,” and “export” among the actors involved in the social and cultural landscape of Romania during the chronological period under investigation.

Beginning with the three main directions outlined in the subtitle of the work, namely, the “post-imperial realities” of a Greater Romania that incorporated the historical provinces (Transylvania, Bukovina, and Bessarabia) along with the entire material, legislative, and cultural heritage of the Austro-Hungarian and Tsarist empires, of which they were a part until 1918, the “public discourse” as a vector of cultural

expression, and the complex and evolving “cultural fields” through which communication between the “Romanian” and “German” cultural poles took place, this book naturally proposes an interdisciplinary research approach to achieve the ambitious objectives pursued by the authors. This approach harmoniously combines historical and linguistic research. Thus, it presents and analyses the main constitutive elements (historical, geographical, cultural, anthropological, etc.) of the complex concept of “Romanian cultural identity,” while also showing how the evolution of this concept has been influenced by interactions with the European cultural space, particularly the German one.

Moreover, to address and analyze the connections between the Romanian and German cultural spaces, the authors chose a specific timeframe defined by the end of World War I and the year 1933, which saw the establishment of the National Socialist regime in Germany. This choice is by no means incidental, considering that—despite existing difficulties—the parliamentary democratic regime in Romania experienced a process of consolidation, while Romanian society was characterized by a broad openness to Western cultures, with the German cultural space occupying a particularly important place. Moreover, the studies included in the book detail both the historical and cultural aspects of the interaction between the Romanian and German cultural spaces.

If in the period preceding the Great Union, the German language and culture served as a vector for the modernization of Romanian society and its connection to the standards of European civilization, the studies included in the work reveal that, despite the prestige they continued to enjoy

within Greater Romania, the German language and culture faced significant challenges. These challenges were generated, on one hand, by the (sometimes excessive) centralization policies promoted by Romanian governments and, on the other hand, by the decline of ethnic Germans from a dominant nationality to a minority. This status compelled the German minority to make considerable efforts to preserve its identity (including the cultural one), which, as expected, naturally generated tensions in the context of the national homogenization policies pursued by Romanian governments.

The work coordinated by professors Andrei Corbea-Hoișie and Rudolf Gräf certainly represents a fundamental contribution to the understanding of the history and culture of the German minority in Romania during the period 1918–1933, as well as of the interaction between the Romanian and German cultural spaces (institutions, actors, communication networks, etc.). Despite the large number of topics (particularly historical and linguistic) addressed in the work, it is especially noteworthy for the novel information introduced into the scientific discourse, the quality of the analyses and interpretations provided by the specialists involved in researching such a complex subject, and the truly impressive documentary basis of the work. All these elements make this volume a reference work aimed primarily at specialists, as well as a model for future research in this promising field.



OTTMAR TRĂȘCĂ

ALBERTO CASTALDINI
Contra Genezei: Antropopoieza, evreii și național-socialismul

(Against Genesis: Anthropopoesis, the Jews, and National Socialism)

Foreword by MIHAELA GLIGOR

Translated from the Italian and Afterword

by RALUCA LAZAROVICI VEREȘ

 Oradea: Ratio et Revelatio, 2023

THIS BOOK is an important contribution to the elucidation of a phenomenon which, from a certain point of view, seems to be in the realm of the *absolutely inexplicable*: totalitarianism. Inexplicable, because despite entire libraries on the subject, we still refuse to accept that such a thing could happen. The question *How was this possible?* continues to haunt us. And no matter how much more is written, the answer will probably never fully satisfy us.

Communism and Nazism, *heterozygous twins*, as a French philosopher called them, have been the main strains of this pathology. Alberto Castaldini focuses on the latter. The author uses extensive documentation, coupled with vast erudition, in explaining the reconfiguration of the concept of human nature orchestrated by the National Socialist regime during its twelve years of existence. The reader is reminded that, beyond the regime's defining racial-biological component, the stakes were in fact much higher: challenging philosophical anthropology as it had been shaped by the biblical tradition and classical philosophy (the two spiritual pillars of Western civilization) (pp. 137–164).

Castaldini's essay is based on a rich documentation, supported by an impressive bibliography, in which multi-disciplinarity

finds a natural place. The footnotes provide substantial explanations, which shed additional light on a subject that is by no means simple. In eight comprehensive chapters, Castaldini tackles topics such as racial science/*Rassenlehre* (pp. 27–47), the heritage of the ancestors/*Abnenerbe* (pp. 49–63), or the *immunization* of a community (pp. 95–96, 109–110) understood exclusively as a *community of blood* (*Blutsgemeinschaft*) against a pathogen: the stranger, the Jew. The author undertakes a veritable archaeological work, bringing to the surface from the depths of history names such as Fritz Lenz, Eugen Fischer, Hans F. K. Günther and Otmar von Verschuer. Once true stars of the academic world, occupants of important chairs at prestigious European universities, they have now fallen into well-deserved oblivion. As exponents of a pseudo-science of race, within disciplines such as 'hygiene' and racial psychology (pp. 29–31), their notoriety at the time is indicative of the collective insanity that had gripped Germany in particular, but also other countries of Europe.

What happened with all these theories, as Castaldini points out, was a reduction of man, as complete being and a complex synthesis between soma and psyche, to his *physis*. This goes against the whole European philosophical and spiritual tradition, including some German thinkers of the time, such as Max Scheler, Helmuth Plessner or Arnold Gehlen, who advocated "a broader interpretation of humanity that does not conflict with the biological sciences" (p. 27).

Under the influence of 19th century positivism there was a "zoologization" of German anthropology. The intentional confusion between races and species gives credence to the idea that differences be-

tween human races are not in terms of grade but of the *essence*, of the *kind*, like those between different species. The ontological unity of the genus *homo*, affirmed by the Christian tradition and by the scientific tradition (Linnaeus, Buffon), was shattered (pp. 68–72, 171–177). The polygenism advocated by the exponents of racist theories sought to suggest that the lesser species of hominids gave rise in the course of evolution to the lesser human races, while the higher ones were at the origin of the northern variety. So, a human community, a nation, had to guarantee its biological purity, because the stranger, a veritable virus, was liable to affect its immunity. Consanguinity was morphologically expressible, visible in all the gestures and features of a human group. Consequently, Germany moved towards a deculturalized and biologized history.

Biology was not the real target of the National-Socialist rhetoric, but rather the corruption of the spirit and the souls: the stake of evil throughout human history. This is visible in the deterioration of language in the Nazi newspeak, described in those years by authors like Robert Musil, Karl Kraus, or Viktor Klemperer (pp. 114–115), an analysis taken up by thinkers like Eric Voegelin. Terms like *Sonderbehandlung* or *Endlösung* were cynical euphemisms, masking the fall of humanity into the darkest abyss. Evil has no creative power but parasitically feeds on the good. The perversion of the medical profession in concentration camps was emblematic in this respect, as the author notes. From guardian angels and saviors of lives, doctors became an instrument of crime, responsible for separating the ‘cattle’ fit for work from those too weak to deserve to live. The hideous caricature of the good,

its utter distortion, reached its climax at Auschwitz-Birkenau (pp. 17–26).

Alberto Castaldini writes engagingly, managing to avoid academic pedantry in language. That is not to say that this is an undemanding work. The book forces the readers to make an intellectual effort, without discouraging them, and it is useful both to specialists in the field and to those who are new to the topic.



BOGDAN IVAȘCU

DANIELA POPESCU

Navigând în ape învolburate: România și Turcia în vreme de pace și de război (1934–1948)

(Sailing in troubled waters: Romania and Turkey in times of peace and war, 1934–1948)

Foreword by VIRGILIU LEON ȚĂRĂU

Cluj-Napoca: Editura Mega, 2023

THE RECENT publication of Daniela Popescu’s book can be seen as one of the representative events on the agenda of the Cluj publishing house Mega in 2023. Originating from the author’s doctoral thesis (defended in 2020), the current work analyzes in an unprecedented manner the specific situation of Romania and Turkey in the international context of the period preceding the Second World War, then in the context of the war proper, and finally in the first postwar years. Daniela Popescu, a lecturer at the Faculty of History, University of Bucharest, specializing both in contemporary history and in international relations, proposes a binocular approach to the analyzed subject, combining the investigation of the regional

framework and the political history of Romanian–Turkish relations with an analysis of the international context of the period. The juxtaposition of the analytical methods specific to the two disciplines allowed the author to build an ambivalent narrative discourse, deliberately interdisciplinary, but also showing continuity when compared to the few approaches to the topic in Romanian literature, corroborated with the sectoral approaches of recent Turkish historiography.

The work follows the evolution of Romania and Turkey over three distinct sub-periods that are the subject of the three structural parts of the work: the stage of cordial appearances and the years preceding the second world conflagration (1934–1939), the years of the war (1939–1945), and then the first years after the end of the conflagration (1945–1948). For each sub-period, the international context, the coordinates (codes) of the internal and external policies of the two countries, and then the concrete terms of the Romanian–Turkish bilateral relations against the background of the mentioned coordinates are successively illustrated. Thus, the author tries and succeeds to carry out a complete schematic analysis of the investigated topic within a trinomial chrono-thematic matrix of the context–operational codes–bilateral relations type.

The evaluation of the international and regional context in which Romania and Turkey evolved in each of the aforementioned stages gave Daniela Popescu the opportunity to combine the historical method of analysis with the explanatory presentation of the researched phenomenology through the epistemic-methodological grid specific to international relations. In context, the theoretical-intel-

lectual positioning of the author during her scholarly investigation is, as Professor Virgiliu Țârău remarked in the foreword to the book, framed “predominantly in a neorealist paradigm, with small constructivist accents” (p. 10). However, given the analysis of a political-historical context in which solutions were frantically sought to safeguard peace and maintain the status quo (in the prewar years), and then for the reconfiguration of the international order (in the immediate postwar years), we believe that the recourse to the assumptions of the rationalist paradigm (the English School) would have been useful and desirable in explaining the international background against which the elements of the narrative were projected. Thus, the efforts of Romania and Turkey at the end of the 1930s to avoid as much as possible the risks of imminent belligerence could also be interpreted in the rationalistic range of the fatality of the conflict, despite the international regulatory and institutional framework (rather unstable) that sought to ensure order in Europe.

However, the author uses the international political and geopolitical framework as analytical support for decoding the main coordinates (codes) of the Romanian and Turkish interests of that time, responsible in their turn for configuring the particularities of the bilateral relations scheme, for which Daniela Popescu formulates a series of interesting and innovative interpretations. In this evaluative matrix, the current study catalogs the political and economic changes of direction that Romania had to execute amid the prewar geopolitical insecurity and given the lack of viable alternatives during and after World War II (pp. 100–101). Regarding Turkey, the author systematically identifies the sources of the

internal policies and the Turkish economic context on the basis of which Ankara set its state neutrality as the cornerstone of its international policies until 1945, based on the principles of peace and of Turkey's non-involvement in external conflicts (p. 106). The present analysis shows that these immiscible objectives of the two countries invariably marked the relations between them, which ran from a weak pre-war coagulation to an immediate postwar relational deadlock that took place against the background of the emergence of the new Cold War (p. 295). Thus, Daniela Popescu uses a combination of case studies and the narration of specific episodes to paint the emaciated picture of Romanian–Turkish relations during the analyzed period. To illustrate the context of the tentative prewar bilateral relations and the events that generated them, the paper successively presents the impact of the Montreux Conference, the conditions of the minorities in Romania that generated the exodus of ethnic Turks in the 1930s, the impact on Romanian–Turkish relations of the failure of the efforts to secure the Balkans, and the adventures of the air travel to Romania of the Turkish president's foster daughter. In order to highlight the state of bilateral relations during the war, the author subtly resorts to the semiotic-diplomatic connotations of some discrete events that happened in the years 1941–1944, such as the case of some Romanian maritime ships that were refugees in the port of Istanbul, which indicated that Germany was not planning an aggression against Turkey (p. 243). The diluted postwar Romanian–Turkish relationship is also presented through a case study that evokes the repressive surveillance by the

new pro-Soviet authorities in Bucharest of the ties between the Turkish minority in Romania and the Turkish government. Another case study presented by the author and regarding the immediate postwar years refers to the state of mind in the Romanian army in those years (p. 273), a subject that has nothing to do with the topic of Romanian–Turkish relations, but which can still be accepted in the economy of the work as it highlights the socio-political situation in the Romanian environment against the background of which the break with the Western world, including Turkey, took place.

Drawing on an extensive range of diplomatic and national security documentation sources and on the Romanian, Turkish and Western historiographical literature, the young historian from Bucharest managed to analyze in an original way the winding roadmap of Romanian–Turkish relations in a period marked by acute crises and tensions in the European and regional hinterland. In this evaluative framework, the main results of the analysis highlight the causal relationship between the international political context and the specific approaches of the Romanian–Turkish bilateral relations in the crisis situations of the analyzed period, as well as the immediate postwar geopolitical framework that marked the (non) Romanian–Turkish diplomatic relationship after 1945. At the same time, in keeping with the rigors of the academic approach, the language used in the analysis is itself a consistent auxiliary tool of the investigation, being balanced and well adapted to the addressed topic, even with some aesthetic-literary overtones, which makes the book pleasant and accessible both to specialists and to a cul-

tured readership coming from related intellectual fields, while still lacking a general addressability for the uninitiated public.

The conclusions emphasize the inconsistency of Romanian–Turkish relations throughout the analyzed period (and sub-periods), a situation ascribed to the context and to the influence of the international agenda. The author finds that, if in the interwar era both Turkey and Romania opted for a similar policy of alliances at the European and regional level, which catalyzed a certain rapprochement, after World War II “there was no renewal of Romanian–Turkish relations, but an even greater distance between them, leaving the Iron Curtain to envelop the Bucharest–Ankara communication” (p. 337).

The historiographical relevance of this book resides not only in the definite added value that it brings to the Romanian academic approach to the analyzed topic, but also in the diversity of perspectives that it opens up for subsequent approaches, including as a starting point for updating and contextualizing the Romanian–Turkish relations. From this point of view, Daniela Popescu’s treatise stands out as a comprehensive synthesis of the history of Romanian–Turkish relations, a robust historiographic landmark and a solid argument for future research projects on the more recent Romanian–Turkish relations.

□

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