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Contents

Travel Writing, Literature, and Romance: Polixéna Wesselényi's *Travels in Italy and Switzerland*

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Abstract. Polixéna Wesselényi's *Travels in Italy and Switzerland*, the first travel narrative that was written by a woman in Hungary and Transylvania, is a work little known to the wider international public, as it was published in Hungarian in 1842, seven years after her tour. There are few travel narratives written by East-Central European women in the first half of the nineteenth century. This essay attempts to reflect upon Wesselényi's personal motives, her intellect and literary craftsmanship, as well as the cultural constraints she had to encounter. The romantic nature of the relationship between Wesselényi, a married woman, and the fellow travel writer John Paget, is also mirrored by the text. *Travels in Italy and Switzerland* not only offers an insight into the relatively favourable situation of Transylvanian women of the aristocracy in the 1830s but also shows that it had the power to inspire the works of celebrated Hungarian novelists after its publication. Although Wesselényi's style conforms to the picturesque and sentimental travel writing published by European women in the period, it justly demands a place for itself on the list of distinguished nineteenth-century European travel writing by women.

Keywords: John Paget, Polixéna Wesselényi, women's travel writing, East-Central European travel writers

1. Polixéna Wesselényi, the first Hungarian woman travel writer

Upon leaving the town of Leutschau[1] in the northern highlands of Hungary in 1835, English travel writer John Paget and his friend receive a basket full of flowers and bottles of Tokay, accompanied by a mysterious letter. It is from an "Unknown" admirer written "in the name of the ladies of Hungary" (Paget

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1   Lőcse (in Hungarian), Levoča, Slovakia today.

1839: 1. 446). In the letter, the travellers are addressed "as the representatives of a free nation," "the compatriots of Shakespeare, Byron, Scott, and Bulwer" (1839: 1. 446–447). Paget recalls his romantic musings concerning the identity, and especially the beauty of the feminine writer. But the pleasant thoughts are brutally dispelled when they are informed that the writer of the letter is a lady of "advanced age" (Paget 1839: 1. 448). Paget's subtle sense of humour is present throughout his writing, and his fondness for women, especially pretty women, is evident on the pages of *Hungary and Transylvania; with Remarks on Their Condition, Social, Political, and Economical.* First published in 1839 by John Murray, Paget's comprehensive travel narrative introduced to English readers the rarely travelled regions of the Austrian Empire, Hungary and Transylvania, their peoples and institutions, their past and present. It is less widely known, however, that the lady who inspired this successful publication and to whom his travel narrative was dedicated, Polixéna Wesselényi, the lady he admired the most, was also the first Hungarian woman travel writer.

Anna Fábri describes Wesselényi as being responsible for "not only the first piece of Hungarian-language travel writing, but also the earliest Hungarian Romantic work to be written by a woman" (2001: 95). From a European perspective, Wesselényi's *Travels in Italy and Switzerland* (*Olaszhoni és schweizi utazás*) published seven years after her tour in 1842, conforms to the picturesque and sentimental travel writing by women in the period, in which it is the "intensity of personal response" that dominates, rather than the scientific or factual approaches typical of male travel writers (Thompson 2011: 185). Her work also stands out in the respect that it was written by an East-Central European woman traveller, more precisely by a Hungarian baroness from Transylvania, a country which was then regarded as being "on the very limits of European civilization" (Paget 1839: 2. 259). Although Carl Thompson warns scholars about regarding women's travel writing only "as a form of autobiographical life writing" (2017: 133), travel narratives written by East-Central European women in the first half of the nineteenth century are so rare that in this case Wesselényi's personal motives, the relative independence of her social status, as well as her intellect and literary craftsmanship are worth taking into account. Therefore, this essay throws light not only on the autobiographical and "emotive and impressionistic" traits in Wesselényi's writing (Thompson 2011: 185) or on her intellectual feats and literary accomplishments but also on the power of her independent nature which can be glimpsed through her text. Her writing, which challenges contemporary prejudice against women travellers and travel writers, also reflects strong religious and political convictions, as well as emotional attachments. Within a European context, *Travels in Italy and Switzerland* can be placed alongside the travelogues of Mariana Starke, Lady Morgan, or Mary Shelley, even if the writer herself came from the Principality of Transylvania, under Austrian rule at the time, and the

language of the text is Hungarian. The power of her narrative, as well as the romantic nature of her experience, even proved to be strong enough to inspire famous Hungarian novelists who borrowed scenes from her *Travels*.

Who was this woman who proved to be such an inspiration for Paget that he ended up marrying her around 1837-38 and settling down with her on her Transylvanian estates? When Polixéna Wesselényi first met Paget in Rome in 1835, she was thirty-four, still married to the liberal Transylvanian politician László Bánffy. At the time, she was also recovering from a romantic relationship with one of the foremost opposition leaders of the Hungarian Reform period, the famous Miklós Wesselényi, her second cousin. In Wesselényi's case, it is probable that her journey abroad was partly motivated by the wish to escape from her ruined marriage and the tense political atmosphere in Hungary and Transylvania at the time (Cs. Lingvay 2006: 11). Another reason for leaving her family's estates must have been her ennui, the intellectual thirst for variety, culture, and inspiration. Wesselényi was an educated, well-read, and a highly independent-minded woman. She could speak French, German, and English fluently and also Italian and Romanian at a certain level. The fact that she undertook to travel in the small company of her eight-year-old daughter Jozefa and her friend Susanne Bois de Chesne (her daughter's Swiss governess), with only one male servant to travel across rough roads and amidst unfavourable winter conditions, reflects her firm resolution to escape from problems at home and the fervent wish to find answers to them in an inspirational artistic and intellectual atmosphere. For this purpose, she was willing to disregard accepted norms of Transylvanian and European high society, just as with her writing she was willing to transgress into a realm of travel writing where Western European women appeared more frequently, but where East-Central European women rarely tread.

1.1. Polixéna Wesselényi's *Travels to Italy and Switzerland*

When Carl Thompson stresses the need to re-evaluate women's writing and to recognize that there are no fundamental differences between the travel narratives of female and male travellers, he writes of certain "cultural constraints", which can be detected in women travellers' narratives and are responsible for the differences between female and "male-authored narratives" (2017: 132). Women travel writers were also aware of these culturally determined constraints. Wesselényi herself points out in the preface to her *Travels* that she has to contend against "the fashionable prejudice" of her country, according to which a woman should not write travelogues because "modesty forbids [her] sex to stand out from the rest with any other feature than beauty (Wesselényi 1981: 5).[2] Similarly to

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2   All translations are mine from Wesselényi, Polixéna. 1981. [1842]. *Olaszhoni és schweizi utazás* [*Travels in Italy and Switzerland*], eds. János Győri and Zoltán Jékely. Budapest: Magvető.

other European nineteenth-century women travel writers, there is a "disclaimer" in the preface (Mills 1991: 83) to explain to readers why she is writing her travel account even though she knows that she is transgressing into a masculine realm and has "little literary talent" (Wesselényi 1981: 5). Nor can she be regarded as a true artist. Wesselényi claims that she simply enjoys recollecting her memories and confidently stresses the role of emotions in her writing, her "female delicacy", which allowed her to "feel appropriately" in such cases (Wesselényi 1981: 5). She is thus arguing the case for female authority in travel writing behind the familiar mask of modesty and is warning readers that her book is not a socio-political economical travel narrative (like Paget's), and it was "not written for a scientific" purpose (Wesselényi 1981: 6).

Although at the time Wesselényi was regarded as a solitary traveller (even if she was accompanied by her daughter, a governess, and a manservant) who had to make her own decisions and suffer the uncomfortable stages of her journey, she considered travelling a challenge, an escape from the ennui which paralysed her at home. In society, however, it was not so pleasant to be without a male partner. Her position as a relatively young woman travelling alone without her husband was regarded as unusual, and this is the reason why she returns several times to what she found to be the greatest problem of her independence:

> It is not so awkward for a woman to travel alone, even if travelling is accompanied by irritations and boredom, especially in the civilized parts of Europe; but to appear in society and move about in it, is very much so; her solitary position, especially if time has not yet left its mark upon her features, is conspicuous and unnatural, and it seems as if everyone were placing the single woman under close scrutiny with their inquisitive glances; what is the reason for her being alone, why does she appear without a supporter or protector in the competitive marketplace of society? (Wesselényi 1981: 51)

Nevertheless, she accepts invitations even if it is embarrassing for her to appear at social events without a male partner.

Writing about women travel writers, Susan Bassnett emphasizes that although many of them wished to convey to readers the impression that they were capable of almost the same physical exertions as men, there were certain topics which they were more concerned with, such as "details of clothing, accounts of domestic life, or the inclusion of romantic episodes" (2002: 239). Preoccupations with her attire are a source of annoyance for Wesselényi. On one occasion when she takes a carriage to Duke Torlonia's ball and she is all dressed up with a "fan and a bouquet in [her] hands", she soon finds herself in a traffic jam full of carriages. She is annoyed that she should be held up by the traffic and anxious that any minute her

"light, flowery dress for dancing" could be splattered with mud by the sudden jolts of the carriage (Wesselényi 1981: 61). Besides such concerns, more serious ones dominate; her patriotism and political ideals, her family and national pride, her religion are also emphasized. When Duke T— (Duke Torlonia) is condescending enough to chat with her and asks her about her family name, she cannot refrain from politely stressing that her name is a historical one. Simultaneously, she is also hinting to the Duke that he should not be so proud of his name and rank, since his father was granted the title by Napoleon (Jékely 1981: 446). Wesselényi is also shocked by what she regards as the relative poverty of the Italian nobility, by the emptiness of social gatherings and embarrassing practices such as collecting money from the guests after a major ball. Nevertheless, she is not averse to making acquaintances who secure her further opportunities to socialize.

Through a Hungarian consul in Rome, Wesselényi and her small company are received by the Pope. In amusing passages, she describes how she was particularly embarrassed when she found out that during the Papal audience even women were expected to kiss the Pope's hand. When she is finally received by him, she remains firm in her resolve not to conform to etiquette. As a proud Hungarian Protestant, "a zealous follower of Calvin", as she refers to herself, Wesselényi ignores the Pope's outstretched hand and simply bends her head to show her respect (Wesselényi 1981: 99). When the Pope inquires about the language spoken in Hungary, assuming it is German, she proudly contradicts him. But when the Pope refers to the political atmosphere after the dissolution of the Transylvanian Diet, taking it for granted that "tutto e tranquillo" [all is quiet], Wesselényi, out of politeness, does not contradict him to give way to her own heated opinion on national and political issues (Wesselényi 1981: 102). A few days later, she offers her cousin Miklós Wesselényi's book (*Balítéletek*), banned in Hungary by the Austrian authorities, to Cardinal Mezzofanti in the Vatican Library. Another instance which demonstrates her patriotism and her opposition to the Austrian rule in Hungary and Transylvania is the occasion when she visits the ex-king of Holland, Louis Buonaparte, Napoleon's brother, living in exile in Florence.

> Then he pointed to the sculpture of Napoleon and asked "Do you know who this is?" Whereupon Marchesa P. told him that I was a great admirer of the Empereur; to which I added, "and we women don't just admire him; I, for one, cherish his memory from the depth of my heart." He then earnestly grabbed by hand. "Do you really cherish his memory? So, there are people in Austria who don't hate him?" to which I answered somewhat drily, "I am Hungarian." (Wesselényi 1981: 227–228)

Napoleon was seen as a liberator rather than as an oppressor by Hungarians of nationalist-liberal convictions at the time. The sorrowful emotions about the

political situation in her homeland under Habsburg rule, the anxiety over the future trial of her cousin Miklós Wesselényi by the Austrian authorities break through the descriptions of Italian social and political scene.

Allowing herself to be guided by Mariana Starke's guidebook, she enthusiastically visits the galleries and museums of Rome, Naples, and Florence. As Wesselényi was an amateur artist who studied painting from Miklós Barabás,[3] a distinguished Hungarian portrait artist, she describes the masterpieces with an expert eye, also giving voice to her appreciation or critical opinion. She takes care to single out those artworks which were created by women, such as Elisabetta Sirani or Angelica Kauffmann, although she finds them inferior to those of the great masters. In Rome, she marvels at the magnificence of St Peter's Cathedral and the Vatican Museum and indefatigably visits all the galleries. In Florence, she visits the Uffizi almost every day to see the great masterpieces of Raffaello and Perugino. Among her favourite statues are the alabaster figures of Niobe and Venus de' Medici. Besides describing the works of art through the eyes of an amateur artist, she also provides her opinion on the everlasting philosophical debate between utilitarians and artists and art lovers on the usefulness of art:

> Where can one draw the line between what is useful, necessary and delightful? Aren't there also moral necessities to consider? Doesn't the developing soul have immediate spiritual needs, just like the one that has reached a higher level of development? Born with senses and the ability to think, our artistic taste necessarily exists… Nothing is beyond usefulness and necessity if it awakens in us more noble sentiments of pleasure. (Wesselényi 1981: 222)

Music is also a source of artistic delight for Wesselényi. In Rome, she visits churches and attends long Catholic Easter church services, which she finds exhausting. But she praises the soulfully uplifting Miserere in the Sistine Chapel on Good Friday, "with its enormous harmony uniting heart and soul" (Wesselényi 1981: 106). One of her frequent companions on these visits is her future husband, John Paget. Wesselényi meets Paget, it seems, during the very first days of her sojourn in Rome in February 1835. Throughout the text, Paget is referred to as "N.". He becomes a frequent companion and accompanies her to most of the famous sights in the city (Jékely 1981: 391). He is by her side in Naples and Florence as well.

The passages in *Travels in Italy and Switzerland* where N's conspicuous presence can be observed also reveal Polixéna Wesselényi's high temper and free

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3   Miklós Barabás became acquainted with his future wife, Susanne Bois de Chesne, Polixéna Wesselényi's friend and travelling companion, when the two women were in Rome, according to his diary (Jékely 1981: 391).

spirit, occasionally, even rebellious nature. Anna Fábri also points out Wesselényi's "profound need for personal freedom and self-realization" (2002: 95). Ironically, she still has to rely on men to achieve her purpose. One occasion she relates has symbolic significance: there is an embarrassing situation when Wesselényi and Susanne, without paying heed to the gentlemen's warnings, climb up the crumbling walls of the Baths of Caracalla. Once up on the wall, however, they cannot get down and have to cry out for the assistance of the men (including N.) in their party. In a self-deprecatory paragraph, she describes the reckless spirit of freedom which led them "to leave the gentlemen playfully behind because they warned us to be careful" (Wesselényi 1981: 132). She mentions women's power over men but censures the thoughtlessness of women who put themselves into dangerous situations without a second thought for the gentlemen who would have to endanger their own safety by saving them. "This was such an occasion", she observes, "but after a brief scolding, which we had to endure with modesty, we were helped down" (Wesselényi 1981: 133). The word "endure" is a sign of silent protest and resentment. There are several similar scenes in the travel narrative when Wesselényi wishes to undertake dangerous exploits. She makes physically demanding excursions to the Italian and Swiss countryside, for instance, which was unusual for women in the period, climbing Mount Vesuvius with Paget or Mont Blanc with Paget's brother Arthur, when Paget has already left for Hungary. Wesselényi describes in detail these memorable adventures, especially the incident on Mount Vesuvius, when reluctantly, but out of necessity, she has to give up climbing to the top of the mountain on foot in the sweltering heat. She is utterly distressed when Paget has to obtain a "brancard"[4] for her. Nevertheless, when the men tell her that she cannot go to the edge of the crater on account of the poisonous sulphurous gases emanating from the volcano, she is determined to the point of wilfulness. When the guide tries to reason with her, saying that "it's not for women, we never take them there", Wesselényi's reaction is the following: "Hearing that it's not for women – which always arms me against such prejudice – my wish became a will and like a naughty child I became obstinate, and so we began to go round the double crater" (Wesselényi 1981: 184). The result of her obstinacy ends in her inhaling the vapours and losing consciousness. But at least she was able to achieve her purpose, to join the ranks of the very few women who climbed Mount Vesuvius.

Neither is Wesselényi to be dissuaded from visiting places unfit for the sensibilities of delicate women, such as Santo Spirito, the mental asylum in Rome. The description of the existing conditions in the institution offers a veritable documentary of the treatment of mental patients in that period. She visits the place together with N., where the deplorable situation of a middle-aged Scotch woman who has been cast in the asylum, seemingly without reason, stirs

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4   *brancard* – a "comfortable leather chair" with a wooden plank for supporting the feet, carried by four persons (Wesselényi 1981: 180).

her compassion. The woman begs the Englishman to intervene on her behalf for her release (Wesselényi 1981: 122–126). She claims that she is unmarried and has been abandoned by the father of her five children. After the visit, N. wins Wesselényi's admiration for doing all he can for his compatriot: making another visit and taking steps on the woman's behalf at the British consulate. Thus Paget's presence in Rome dispels her ennui, and she is able to enjoy herself. When it is time to move on when the spring season draws to its close, Wesselényi is also determined to go to Naples. But the road from Rome to Naples was full of dangers for travellers, especially for women travelling alone:

> I was in a great quandary amidst travel preparations; my manservant was loading a pair of rusty pistols; and I was turning over a pretty little Turkish dagger with a gemmed handle and bitterly ruminating over the adverse situation of solitary women when N. came to say goodbye. "So you are leaving tomorrow?" "I am, most certainly." "What do you wish to do with these deadly weapons?" "There is no need to laugh; we cannot go unarmed on such a dangerous journey." He continued to laugh and offered *en preux* chevalier to accompany us with his brother; and I was happy to accept his offer, promising myself an entertaining and carefree journey. (Wesselényi 1981: 147–148)

N. and his brother (Paget and his brother Arthur) provide the security for the two women and Polixéna's daughter. When at Mesa they have to stop and the ranting and dissatisfied postmaster makes a scene by cursing loudly and throwing the payment he received on the ground, threatening to shoot them, Wesselényi imagines a host of bandits emerging from hiding and attacking them. But "N's imagination was not so fruitful in picturing to himself such dangerous situations as mine was; he just laughed, disembarked from the carriage and picked up and pocketed the money" (Wesselényi 1981: 151).

Another "constraint" that Wesselényi is aware of, besides that of travelling alone, is the one that her own romantic imagination creates. She self-mockingly criticizes her love of contemporary romantic novels and their influence upon her own imagination and sensibility. N., the young but mature and rational-minded male companion, is there to check her sentimental outbursts. At one point in the narrative, she refers to J., accidentally (John Paget), instead of using the familiar "N." and relates a discussion between them that took place en route to Pompeii in a carriage. Their views clash on the difference between the beauty of the dream world of fiction and reality. Still being under the romantic influence of Bulwer-Lytton's *The Last Days of Pompeii*, Wesselényi shares her feelings of melancholy with the others about the difference between the lively descriptions in the book and the faded reliques they are to expect in Pompeii:

"I'm afraid that in my case reality will not match those pictures which the enchanting magic of the book has conjured in my soul. It's so wonderful to soar high into the regions of poetry. What is the use of poking about in the narrow and unfriendly world of everyday, or rather kitchen reality […]; it's of so little interest to know what kind of oven the ancients used to bake their bread in; or whether they kept their oil in wide or narrow-mouthed bowls." Letting my head drop to the side, and contented with my tirade, I had hardly lapsed into silence when J. burst into loud laughter. "Oh, I am sorry; I will not argue that everything is as beautiful [in the book] as you have described. Which German book did you get these ideas from? I wonder that – en parenthèse – such a sensible woman as you can take seriously such outdated sentimental musings and can repeat them with a straight face only because many regard these twisted sentimentalities as delicate and elevating. If the real had no other worth but that it was real: it would still be far above poetry!" (Wesselényi 1981: 188–189)

It goes without saying that Paget is on the side of the beauty of reality. This remarkable report of a conversation on a crucial Romantic artistic issue of the times (reality vs. art and literature), in which Paget's outburst sounds like a reprimand, also exemplifies the difference between the more "scientific" writings of male travel narratives (Paget's *Hungary and Transylvania* is a perfect example) and the more sentimental, self-effacing, and less "authoritative" texts of women travellers, which were expected to be "amateurish" (Mills 1991: 83). Wesselényi's text, however, even if sentimental, is rarely self-effacing. In Florence, she throws a small party; N. is also present when a hired musician finishes his song with a rhyme in their honour, guessing correctly that there is more than just companionship between the beautiful Hungarian lady and the English gentleman: "E viva le bella Ungherese,/E la generosa nazione Inglese!" (Wesselényi 1981: 258).

Anna Fábri emphasizes that Polixéna Wesselényi "shows a particular interest in the different fates, views and conflicts of women", which she shares with her readers (2001: 95). She is especially struck by the experience of unhappy married women; women who were forced to marry despite their inclinations or who found themselves unhappy in their marriage. Wesselényi is surprised when a lawyer explains to her that in the high society of Florence, for example, adultery is tacitly accepted, but only if the approval of the husband is obtained (Wesselényi 1981: 239). Such women can preserve their reputation. But if the husband disagrees, a woman keeping up an affair can be ruined. She is warned about being too friendly with Marchesa P., for instance. The Marchesa's lover did not win the tacit approval of her husband, as it was customary in Roman society, and first she was abandoned by her lover, then by her husband, and

finally by society. She has become a social outcast who faces the prospect of social, financial, and moral decline. Wesselényi's landlady in Florence is another example; after being abandoned by her lover, she has no choice but to live in an unhappy and estranged relationship with her husband. Another young woman's case is different, and perhaps even worse; Seraphina, who Wesselényi visits at a convent, became a nun to take revenge on the man whom she expected to marry, but who married someone else instead. The revenge was directed at the man she loved, but it turned against herself; now there is no escape for her, and she is the only one who is suffering. Wesselényi dedicates long pages to the stories of these women, expressing her sympathy for them. Her compassion for female social outcasts and unhappy women reflects a free-thinking nature which questions the social norms that existed in Italy at the time and also expresses her unease about her own uncertain status within Transylvanian society as a future divorcee, even if there was more tolerance in such matters in her homeland.

During her stay in Switzerland, Wesselényi pays tribute to Voltaire, Byron, and Mme de Staël by visiting their homes. But her admiration for Mme de Staël, whose achievements rival those of "the foremost authors of her time" (Wesselényi 1981: 350), overpowers her feelings for Voltaire and Byron. According to Wesselényi, Mme de Staël was the only one who "had the strength in all of France" to express her own opinion and not to conform in a "servile manner" to Napoleon. "[W]hen crowned heads of state, scientists did not consider it below their dignity to beg for [Napoleon's] grace: then she, "a weak woman", was able to preserve her principles and the independence of her mind" (Wesselényi 1981: 350). The travel narrative ends fittingly with such musings in Mme de Staël's garden in Coppet, where the French author lies buried.

2. The afterlife of *Travels in Italy and Switzerland*: Polixéna Wesselényi and John Paget in Hungarian Romantic literature

Polixéna Wesselényi's divorce from László Bánffy and her marriage to John Paget, an English gentleman and travel writer, was the talk of the town in Kolozsvár (Cluj), Transylvania, in the late 30s and early 40s. Hungarians, however, were proud that an Englishman was willing to settle amongst them and especially that he was learning the language and slowly turning into a Hungarian landowner. Life and travel writing merged when the relationship between Wesselényi and Paget became transformed into fiction by two distinguished Hungarian novelists, in Miklós Jósika's *Az élet útjai* (The Ways of Life) and Mór Jókai's *Egy az Isten* (God is One). Baron Miklós Jósika, the first author to write historical novels in

Hungarian, published *Az élet útjai* in 1844. He was acquainted with the couple's story and most certainly with Paget himself, as Paget's war diary from the 1848-49 revolution demonstrates (Madden 1939: 241). Unfortunately, *Az élet útjai* is perhaps Jósika's most neglected novel, archaic in language even at the time when it was written and full of romantic excesses. Nevertheless, for our purpose of seeing how a real-life relationship based on travel and romance inspired the imagination of an important contemporary writer, it is worth taking a look at the book and especially at what Jósika regarded as Paget's, or Lord Belford's most characteristic feature, the spirit of independence, which won the heart of Octavia, the character modelled after Polixéna Wesselényi.

In the preface to his work, Jósika tells his readers that the story that he is about to narrate is a "simple" story, "taken from everyday life" and that "there is not one word which has not been uttered already, not one person who has not lived" (1844: v–vi). Nevertheless, Octavia does not have many features that are similar to Polixéna Wesselényi's, except for her family background and social status, the hints that her marriage is not as harmonious as it should be, and the detail that she first meets her second husband, Lord Belford, in Italy. When she decides to remove herself from the world around her, however, she shows a strong will not to conform to the pressure of Transylvanian high society. Belford also shows an independent spirit; it seems that this is the main trait in his character that makes Octavia decide in his favour. The narrator probes Octavia's feelings concerning the Englishman she has heard so much about:

> Octavia did not regard the man's eccentricity and what others considered to be the most interesting about him to be his most notable feature. Since she herself possessed some qualities which hinted at a nuance of eccentricity, she did not regard this trait in others, as it is usually the case, to be so intriguing. Nevertheless, there was something about the man which must have had an effect on this woman – needless to explain to those who can understand such characters –, and this was his spirit of independence. On the basis of what she had heard about him, Octavia regarded Lord Belford to be one of those rare types of men who were firmly determined to be independent. (Jósika 1844: 242–243)[5]

Thus, Octavia and Lord Belford's relationship is based on the determination to be independent and true to their own nature. Although the story presented in the novel cannot be taken seriously as having been taken from "everyday life", it is probable that Jósika grasped the "truth" about the "real" Paget and Wesselényi and presented the free spirit of both through the prism of his fiction.

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5   Translated by the author: M. P.

The other celebrated Romantic Hungarian novelist who was inspired by Wesselényi and Paget is Mór Jókai. *Egy az Isten* (God is One), first published in 1877 and translated by Percy Favor Bicknell, as *Manasseh: A Romance of Transylvania* (1901), and later republished in 1910 as *Manasseh*: *A Story of the Stirring Days of '48*, is based on historical events which took place during and after the Hungarian Revolution of 1848-49.[6] Although the hero of the novel, Manasseh, a young Unitarian painter from Torockó, is only slightly modelled on Paget,[7] and Countess Blanka Zboróy cannot be regarded as the fictional resurrection of Polixéna Wesselényi either, there are some details in the novel which were inspired partly by the couple's romance in Rome and partly by Paget's heroism during the Revolution and the picturesque passages from *Travels in Italy and Switzerland*.

Manasseh, the protagonist, meets Blanka Zboróy in Italy, like Paget who first met Wesselényi in Rome. She is very young and has been married against her will to an Italian Prince. But she is disgusted by her elderly and cruel husband, and the marriage between them was never consummated. Now she is trying to obtain a divorce. In her *Travels*, Wesselényi mentions with great sympathy the young social outcast, Marchesa P., who took a lover although she had an influential but elderly husband. In many ways, Blanka is similar to the Marchesa, being a social outcast, and waiting for the Pope's permission to be divorced. She visits the sights in Rome and, like Wesselényi, admires paintings and churches. Like Wesselényi, she considers Miserere to be the most uplifting event during the Holy Week (Kovács 2020: 324–325). Manasseh is her most reliable companion in Rome, as N. (or Paget) is for Wesselényi. Like Paget, Manasseh is a Unitarian and a morally irreproachable person. But perhaps this is where any resemblance between the protagonist of fiction and the real-life Paget ends. In Jókai's story, Blanka falls in love with Manasseh, whom she can marry only if her first marriage is annulled and if she gives up her own religion and becomes a Unitarian herself. Together with Manasseh, they escape to Torockó, Transylvania, across a country torn by revolution and strife. Torockó is also surrounded by Romanian insurgents who have committed atrocities against the Hungarian population, partly upon the instigation of the Austrian government. The story of the couple's miraculous escape turns the novel into an exciting adventure story.

When the Hungarian Revolution in 1848 broke out, instead of leaving Transylvania, John Paget engaged in voluntary military service. In January '49, he was one among the small troop of men who saved several hundreds of survivors in the forests of Nagyenyed and fought courageously against the Romanian

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6   See Kovács (2008a: 435–446) for a detailed account of the translation of Jókai's *Egy az Isten* or *Manasseh: A Romance of Transylvania*.

7   According to Zsigmond Vita, Manasseh's character was modelled on István Zsakó from Torockó (1975: 177).

insurgents who outnumbered them (Kovács 2008b: 214). Jókai describes the massacre, the scene of devastation, and the suffering of those who survived; the escape of the population into the surrounding forests of the ransacked and burned Transylvanian towns of Zalatna, Sárod, and Nagyenyed. He also mentions the success of the small rescue team of which in real life Paget was a member (Jókai 1912: 3. 67–68, 302). Unfortunately, the translator abridged this passage (along with many others) in the English version of the novel, and only traces of the account of the massacre remain. Paget's presence in the novel is thus not prominent but important. The passages borrowed from Wesselényi's *Travels* describing the Roman atmosphere provide an important backdrop for Jókai's novel. Paget and Wesselényi's relationship, the union between an English gentleman and a Hungarian aristocratic lady, who were both travel writers, was considered to be so romantic and extraordinary at the time that two Hungarian famous authors, Jókai and Jósika, thought it worth fictionalizing and commemorating in their novels.

3. Conclusions

After their marriage, Polixéna Wesselényi, true to her name, settled into domestic life, playing the perfect hostess to the many visitors who happened to stop by at their comfortable country manor in Aranyosgyéres, Transylvania (Cs. Lingvay 2011: 19–20). During the Revolution, Wesselényi and her son Oliver were taken by Paget to Debrecen for their safety, while he returned to fight on the side of the Hungarian revolutionary forces. After the defeat of the revolution, they had to go into "exile", or, in Paget's case, home, to England for a few years. They also travelled in Italy and France and settled in Dresden for a short time until they were officially allowed by the Austrian authorities to return to Transylvania in 1855. When the Pagets finally returned to Gyéres in 1855, they had to rebuild their home. They found the place completely ransacked and all their books burned by Romanian insurgents during the Revolution. Although Polixéna prepared a second travel account of her travels in France and England, she never had the chance to publish her manuscript, which, along with her home, fell victim to the destruction. Wesselényi's ruined manuscript was found in the pond of the park (Cs. Lingvay 2006: 39). By this time, she had buried her first son, Walter Paget (1840–1843).

In the recollections of her visit to Transylvania in 1858, Lucy Tagart, who visited the Pagets, describes Wesselényi or "Mrs. Paget" as "a most interesting companion, well-read and highly-cultured, and an artist; the walls being covered by her paintings" (1903: 6). Only one painting has remained out of the many that she painted, a portrait of her second son, Oliver Paget, whom the Pagets lost in 1863 at the age of 22 as a result of a sudden and mysterious illness in Vienna. His death came as a shock to his parents for he was a promising and

healthy young man who had married recently, leaving behind an infant daughter. Although very young, he had distinguished himself in the Italian revolution on the side of Garibaldi (Cs. Lingvay 2006: 40). Polixéna Wesselényi could never recover fully from the tragedy and never published any of her writings again. Her only surviving child was Jozefa (Bánffy), the little girl who can be glimpsed occasionally on the pages of her book.[8] Thus, *Travels to Italy and Switzerland* remains Polixéna Wesselényi's only work, but one behind which we can glimpse the intellectual and emotional portrait of a confident and free-spirited Hungarian woman writer, whose work, transcending contemporary cultural restraints, well deserves a place among the travelogues written by European women in the first half of the nineteenth century.

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8 There are some notable personages among Wesselényi's descendants: her daughter Jozefa's son Bethlen András became the Minister of Agriculture in Hungary (1890–1894) and her great-granddaughter, Margit Bethlen, the wife of Prime Minister of Hungary Count István Bethlen (1921–1931), became a prolific writer and playwright in the 1920s and 30s.

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John Hunyadi in Hungarian Folklore and Historiography

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Abstract. The folk epic songs of a nation are often associated with heroic actions of famous historical figures of the given nation, whose names are often known beyond Balkan folklore, thus becoming characters of epic folk songs and tales preserved in South Slavic or Romanian folklore. The paper analyses Hungarian, Serbian, and Romanian folklore sources about John Hunyadi's ethnic origin, with the intention to present the biography of this historical figure from the aspect of Hungarian historiography and his folklore heritage through the eyes of some Hungarian and Serbian folklorists. One of these emblematic heroes was certainly John Hunyadi, whose feats (as well as the feats of other members of the Hunyadi family) are told throughout the cycles of Hungarian epic folk tales, as well as the folk tales of the peoples in the surrounding area. This paper is based on the analysis of the collection of Hungarian historical folk tales by Dénes Lengyel, which contains a dozen texts about John Hunyadi. These texts have several points of contact with Romanian and Serbian history and folklore. The second part of the paper presents the biography of John Hunyadi in the light of Hungarian historiography as well as the discussion of his origins.

Keywords: John Hunyadi, folklore, historiography, legends

1. Introduction

The Hungarian archaic folk epic in the realm of historical epic / historical narrative is relatively rich in the genre of heroic texts, whose action is often associated to some significant individual, famous figure from the Hungarian history. For example,

to Hungarian King (Saint) Ladislaus, to King Matthias Corvinus, to the uprising leader Dózsa, to Ferenc Rákoczi, Lajos Kossuth, etc.[1] Many of them outgrew the local frameworks of the Hungarian folklore and (as former real historical figures) became regional, Central European heroes, whose feats are evidenced by epic folk songs and short stories preserved in South Slavic and Romanian folklore, pointing to their former, historical significance and popularity in region.

One of these emblematic heroes was certainly John Hunyadi (Janko Sibinjanin, Szebeni János, Iancu de Hunedoara), whose feats (as well as the feats of other members of the Hunyadi family) are told throughout the cycles of Hungarian epic folk tales, as well as the folk tales of the peoples in the surrounding area.[2] Thus, the collection of Hungarian historical folk tales by Dénes Lengyel contains about ten texts, and, in fact, it forms a special cycle about John Hunyadi (Lengyel 1978: 273–301). As the primary sources of these historical narratives, Dénes Lengyel used the chronicle of Gáspár Heltai, the narrative of József Teleki, the chronicle of John Thuróczy, the text of András Dugonics, the narrative of László Mednyánszky, etc. The topics of these historical narratives include the origins of the Hunyadi family, the youth of John Hunyadi, his successful fight against the Turks, the defeat in the Battle of Kosovo, the famous, victorious battle for Nándorfehérvár (Belgrade), the death of John Hunyadi, the duel between László Hunyadi and Ulrich Cillei, and the death of László Hunyadi. These texts have multiple tangential points with Romanian and Serbian history and folklore.

John Hunyadi's origins gave rise to many legends, the most famous of them allegedly making connection with King Sigismund of Luxembourg, Holy Roman Emperor and King of Hungary. The story of John Hunyadi's royal origin also explains why the coat of arms of the Corvin family has a raven holding a gold ring in its beak. The one who would have contributed the most to the spread of the legend was chronicler and printer Gáspár Heltai in 1574. Heltai stated that he had heard the story from a former courtier of the Hunyadi family.

As Dénes Lengyel was inspired by Gáspár Heltai, he took from him the idea about John Hunyadi's origins, being the illegitimate son of Holy German Emperor and King of Hungary, Sigismund of Luxembourg.

Accordingly, from the story about John Hunyadi's origins, we learn that he is the illegitimate son of Hungarian King Sigismund (Zsigmond), who, while living in Transylvania and fighting there against the Turks, on one occasion met the beautiful daughter of a Romanian boyar of noble descent, Erzsébet Morzsinai. She conceived a child with the king, and the king, in order to provide for his yet unborn child, gave her a written proof of paternity as well as a ring of recognition. Erzsébet, as a pregnant woman, confided her secret to a boyar named Vojk Buthi,

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1   *Magyar néprajzi lexikon* (2006). Arcanum Adatbázis Kft. (available at: https://www.tankonyvtar. hu/hu/tartalom/tkt/magyar-neprajzi-lexikon/ch12.html; accessed on: 26 April 2019).

2   Ibidem.

who, seeing her beauty and wealth, married her. She soon gave birth to a son, Jankula. Being at war against the Turks in Transylvania, the king, after some time, again had the opportunity to meet the mother of his illegitimate son. He rejoiced greatly when he saw his child and ordered Erzsébet to come to Buda with his son to his court. While preparing for the trip, a crow abducted Sigismund's ring from little Jankula, but Erzsébet's brother, Gáspár Morzsinai, eventually managed to shoot the crow and return the precious royal ring.[3] After that, Erzsébet and her son, Jankula, enjoyed the hospitality of King Sigismund in Buda for a certain amount of time, during which the king often played with his extramarital son and showered various valuable gifts upon him. Before the mother and son returned to Transylvania, the king had given them the Hunyad Estate along with its surroundings and ordered the Duke of Transylvania to take care of their safety. Like all members of the Morzsinai family, Jankula received a noble coat of arms, which featured a crow holding a ring in its beak. In addition to that, Erzsébet also received some valuable gifts from the king. This is how Jankula was named after his estate, Hunyad (Lengyel 1978: 273–278).

The Hungarian historical narrative of John Hunyadi's youth established ties between him and the Serbian despot Stefan Lazarević, in whose court he served and where he became an outstanding young soldier. This text tells about the joint hunt of the despot and the young John Hunyadi when a wolf suddenly appeared in front of them. Despot Stefan ordered the young Hunyadi to go after the wolf and kill it. So he did. He pursued the wolf both on dry land and across the river, caught up with it, killed it, and brought its pelt to despot Stefan as evidence. He was very surprised by Hunyadi's success and predicted "that this young man will go a long way" (idem: 278–279).

One of the most brilliant military successes of John Hunyadi was certainly the victory in the battle of Nándorfehérvár (Belgrade) in 1456 (idem: 290–295). One of the Hungarian historical narratives describes in detail this famous battle, in which John Hunyadi played a prominent role as a military commander of a fortress which defended itself against a much larger Turkish military force (ibidem). And not only was it defended, but the defence famously ended in success. Unfortunately, not long after, an infectious disease broke out, and John Hunyadi also succumbed to it. His death is specifically described in one Hungarian historical narrative (idem: 295–296).

Of all the members of the Hunyadi family, by far the most popular figure in the Hungarian folklore was Hungarian King Matthias Corvinus (son of John Hunyadi), who was represented in the Hungarian historical folk prose by nearly eighty texts (idem: 305–462) and who, like his father, was known not only in the Hungarian folklore but also in the folklore of the surrounding peoples.

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3   The ring motif, which is evidence of one's noble origins, known as the "travelling" motif of the Eurasian folklore.

According to research done by Hungarian folklorists, historical stories about members of the Hunyadi family were extremely popular in the Hungarian literary works of poetry and prose in the 15th and 16th centuries. The later oral tradition of the Hunyadis was partly based on these works and partly formed independently. For example, in his *Krónika az magyaroknak dolgairól*[4] (1575), Gáspár Heltai also notes that he has heard and recorded the folk tale of the Hunyadi family's origin from the descendants of the soldiers under his command.[5]

It is very interesting that the epic heritage of Hungarian folklore does not know, that is, it records next to nothing about the battles that John Hunyadi led against the Turks, which are one of the main themes of South Slavic historical tales and epic folk songs.[6] The eminent Hungarian expert in ethnology, Vilmos Voigt, brings to our attention that several Hungarian heroes, members of the Hunyadi family, are represented in South Slavic heroic, epic folk songs, and, as he says, even these broader correlations cannot be fully understood unless we look at the somewhat further context of historical and ethnological data of Albanian, Czech, Austrian, and Italian folklore, that is, if we do not consider their interpretations (Voigt 2012: 61–72).

The emergence of Janko Sibinjanin as an army commander and hero of the battles against the Turks in the Serbian folk tradition, more precisely in the Serbian epic folk songs, was among the first to be explored by Hungarian writer, educator, and translator Mihály Románecz, who published a separate work on him in 1890 in Pančevo (Románecz 1890: 3–24). It was based on a Pančevo edition of the publishing house of the Jovanović brothers from 1881, entitled *Janko Sibinjanin in Folk Songs* (ibidem). From this edition, he translated six epic folk songs into Hungarian: *Marriage of Janko Sibinjanin to a Fairy*; *Janko Sibinjanin and Marko Kraljević*; *Sibinjan Janko with a Fairy; Janko Sibinjanin and the Fairy*; *The Death of Banović Sekula*; *Janko Sibinjanin and Đurđe Smederevac* (ibidem). Of course, he also gave relevant comments and notes regarding the role of Janko Sibinjanin in Serbian folk poetry. Thus, he emphasizes, among other things, that "the great Hungarian hero John Hunyadi appears under the name of Janko Sibinjanin in Serbian folk poetry" and explains that he received his surname after the seat of a duchy, Szeben (Sibin) (idem: 4). Furthermore, he correctly concludes that various historical narratives were created about Janko Sibinjanin in the Serbian and Hungarian folk traditions. In the Serbian folk tradition, Románecz says, Janko Sibinjanin's origins, his fight against the Turks and the fairies, and his family ties with various Serbian heroes (which Hungarian historiography does not record) are represented in epic folk songs "in naive poetic lines" (ibidem).

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4   *Hungarian Chronicle* (Bibliotheca Hungarica Antiqua VIII).
5   *Magyar néprajzi lexikon* (2006). Arcanum Adatbázis Kft. (available at: https://www.tankonyvtar.hu/hu/tartalom/tkt/magyar-neprajzi-lexikon/ch12.html; accessed on: 26 April 2019).
6   Ibidem.

According to Románecz, what the Serbian historical narration says about Janko Sibinjanin's origins is that his father was no one else but despot Stefan Visoki [The Tall]). He happened to be in Buda on one occasion, where he was warmly received and hosted by Hungarian nobles and where he amazed everyone with his grand stature. That is where despot Stefan met a beautiful Hungarian woman, and as a result of that love twins were born: one male and one female child. The mother named their son Janko and their daughter Janka. Despot Stefan left a ring to the mother as a pledge to take care of her extramarital children. When she grew up, Janka married and gave birth to a son, (Banović) Sekula. According to Románecz's interpretation, this is the reason why in Serbian folk poetry Janko Sibinjanin is often seen in the company of Banović (Bánfi) Sekula (ibidem). In the meantime, as a young man, John Hunyadi lived in Buda, where he became noted for his physical skills. When he asked his mother about his ancestry, she handed him the ring of despot Stefan, and, according to the engraved text, he realized that he was a descendant of the Serbian ruler. And, of course, he went looking for his father. As Románecz puts it in Hungarian, "fate brought him to Serbia, where, by fighting against the Turks, he became a hero of another people, although he was also a Hungarian hero" (Románecz 1890: 5).

2. John Hunyadi's biography from the aspect of Hungarian historiography

Independently from its rich folklore heritage, Hungarian historiography, on the basis of historical sources and documents, compiled a biography of John Hunyadi, which contained all the facts that historians could access. Accordingly, it was established that John Hunyadi was born between 1407 and 1409 (without indicating his place of birth) and died in Zemun on 11 August 1456.[7] He was the first-born son of a Romanian boyar from Walachia (*Țara Românească*), who moved to Hungary around 1395. In his youth, he served in the service of István Csáky and before 1427 also in the service of Serbian despot Stefan Lazarević. After 1427, he was a member of the banderium of Mačva Ban László Újlak and later a member in Demeter Csupor's unit. In 1430, he entered the royal service, and he was accompanying King Sigismund when he was in Italy, while between 1431 and 1433 he was in the service of Filippo Visconti in Milan. In 1433, he rejoined King Sigismund, whom he had accompanied on his visit to Basel, and then, in 1437, he accompanied him when the king was visiting the Czech Republic.

Until 1437, he had learned various skills of the existing (contemporary) warfare and armed conflict from the best mercenary military commanders of his time

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[7]   *Magyar Életrajzi Lexikon. 1000–1990.* Revised edition. Ed.: Ágnes Kenyeres (available at: http://mek.oszk.hu/00300/00355/html/index.html; accessed on: 27 April 2019).

and had gained extensive experience on the Turkish way of warfare. He then assembled his army of mercenaries – made up partly from insurgents recruited from among the people – , together with whom he achieved great victories. He also slowly climbed the social ladder: from 1439 to 1446, he held the title of Severin Ban, and from 1441 to 1446 he was the Duke of Transylvania and the Count of Temes. He also became a trusted advisor to Hungarian King Ladislaus I and at the same time supervised the defence of the border with Turkey together with Miklós Újlaki. That is how in 1442 he also won two great victories over the Turkish army. As his life goal, he set out to defend his homeland and to drive out the Turks, and these efforts elevated him above the contemporary, selfish Hungarian nobles. In the summer of 1443, when Hungarian King Ladislaus I embarked on his Balkan campaign, led by John Hunyadi, penetrating the territory towards Niš and Sofia with troops of armoured horsemen, he won several victories against the Turks. His military successes and victories represented a glimmer of hope that the Turks could be pushed out of Europe. After the Balkan campaign, the Hunyadis wanted to rush a new battle against the Turks; however, with King Ladislaus I's uncoordinated moves, there was an unexpected turn for the worse. Thus, at the Battle of Varna (November 10, 1444), which ended in defeat, John Hunyadi managed to escape with his life but was captured by the Romanian Duke Vlad, who later released him, but only after his Hungarian palatine, Lőrinc Héderváry had made serious threats of war.

In 1445, Hunyadi was appointed to be one of the seven chief captains and a member of the state council, and on 5 June 1446 he was appointed state governor.

On 18–19 October 1448, he led an army in the bloody Battle of Kosovo, which was lost due to the betrayal of Đurađ Branković. Hunyadi was captured by Branković, who released him on humiliating terms. After his return, he sought to unite forces in the country and strengthen the central government. Later he also fought against the Turks. Thus, on 2 October 1454, he utterly defeated Firuz Bey's army at Kruševac. In the panic caused by the fall of Constantinople, Hunyadi saw a great opportunity to push the Turks out of Europe completely. To that end, he proposed organizing a combined army of 100,000 warriors, but his proposal was not met with understanding and support. Moreover, the Turkish army launched an attack on Nándorfehérvár (Belgrade). That is where, on 21–22 July 1456, Hunyadi with his army and the army gathered by John Kapisztrán won a glorious victory over a far superior enemy, and this news resonated throughout Europe. Unfortunately, not long after, due to a plague rapidly spreading in his military camp, he died on 11 August. He is buried in St Michael's Church in Alba Julia (Gyulafehérvár) (Jung 2006: 39).[8]

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8   Ibidem – It is important to note that, according to Serbian folk tradition, better said according to a local belief, John Hunyadi was buried in Šumadija, in Topola, where his burial place is allegedly located.

As a famous and recognized figure of the Hungarian history and a prominent historical figure, he was a favourite subject for painters, sculptors, and writers alike. Thus, János Arany, Sándor Kisfaludy, and Lajos Hollós Corvin wrote a play about him, Gergely Czuczor and István Komjáthy dedicated a poem to him, and his life was the subject of novels written by József Darvas, Géza Hegedűs, József Hunyadi, and Mór Bán.

3. Discussions on John Hunyadi's origins, the father of King Matthias Corvinus

These historiographic-ethnological debates on John Hunyadi's origins have been going on for several centuries, and they still continue to this day.[9] The reason for this – at least according to the testimony of available (in part already mentioned) rich scholarly literature – are certainly various folk traditions recorded in the Serbian, Hungarian, and Romanian folklore, as well as other written (Byzantine, Greek, and Serbian) sources about his origins, the place where he was conceived, and his national affiliation, that is, the person of his father and mother.

Of course, the question arises as to why there is so much dispute. Gyula Moravcsik offers a legitimate reason, saying that "during his lifetime Hunyadi belonged not only to his own nation but became a hero of all those peoples who fought in the 15th century a battle of life or death with the Ottoman Turks, and after his death his character continued to live on in the national tradition of these peoples" (Moravcsik 1922: 96–99). This later became a source of debate about who Hunyadi really was and to which people he belonged. Basically, there are four of these "appropriations", the four sides being: Hungarian, Serbian, Romanian, and Greek (ibidem).

In the book *Ungurii despre români. Naşterea unei imagini etnice* (Hungarians about Romanians. The Birth of an Ethnic Image), the authors Melinda Mitu and Sorin Mitu presented the way in which the image of Romanians is reflected in Hungarian culture, that is, "the past of Romanians in the mirror of Hungarian history", in the context of which the dilemma regarding John Hunyadi's origins viewed through the eyes of Hungarian historians and researchers is presented. The authors mention three works that try to prove the thesis of the Szeklers' origin of John Hunyadi. They are signed by György Aranka, Ferenc Kazinczy, and John Kriebel, compiled and published by József Ponori Thewrewk in a book entitled *Három értekezés Hunyadi Székely János [...] törvényes ágyból lett születésének bebizonyítására* (Ro: Trei disertații în vederea dovedirii naşterii lui Hunyadi Székely János dintr-o legătură legitimă; En: Three Dissertations to Prove

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9   For further relevant sources on this topic, see the *References* at the end of this article.

the Birth of Hunyadi Székely John from a Legitimate Connection) published in Bratislava in 1825.

After just eight years, a new book was published on the question of John Hunyadi's origins; the book was authored by poet Gergely Czuczor and was titled *Hunyadi János viselt dolgai Engel és Fesslerből* (Ro: Faptele lui Iancu de Hunedoara, după Engel şi Fessler; En: Acts of John Hunyadi after Engel and Fessler). From the title, it becomes obvious that the author draws on Johann Christian Engel's and Ignaz Fessler' studies on John Hunyadi. Eighteenth-century Transylvanian historian Sándor Aranyosrákosi Székely also wrote a historical work on the Romanians' connections with the Hungarians throughout history. His book is entitled *Erdélyország történetei hiteles kútfőkből* (Ro: Istoriile Ţării Ardealului din izvoare autentice; En: Stories of Transylvania from Authentic Sources) and was published in Cluj in 1845.

4. Folklore heritage about John Hunyadi through the eyes of some Hungarian and Serbian folklorists

In *Serbian* folklore, historical narratives about Hunyadi comprise a whole cycle, and – as the famous Hungarian poet János Arany testified in the 19th century – Serbian young men and girls sang even to that day, accompanied by the sounds of gusle, about who Janko Sibinjanin had been (ibidem). Writer and translator Mihály Románecz also collected some of these Serbian epic folk songs and, at the end of the 19th century in Pančevo, published in the Hungarian translation, together with his comments, those relating to Janko Sibinjanin (Románecz 1890: 3–24). From them, it is possible to conclude the following: the name of this hero comes from the town of Seben (Sibinum, Sibinj), and all Serbian sources unambiguously confirm that he comes from the son of Tsar Lazar (who died in the Battle of Kosovo), despot Stefan, whose wife was a Byzantine princess from the lineage of the Palaiologos (Moravcsik 1922: 96–99). According to Serbian epic folk songs, despot Stefan (who ruled between 1389 and 1427), when returning from Moscow, stopped to rest in Buda, where he conceived a child with a Hungarian girl, and thus Janko Sibinjanin was born. According to another Serbian epic folk song, Janko Sibinjanin was the extramarital child of despot Stefan Lazarević and one girl from Sibiu (Ibidem). And, finally, according to a third source, Janko Sibinjanin was a descendant of despot Stefan and a Greek girl, and various tokens of recognition (for the later identification by his father) – a ring, a sword, and a mace – appear here as well. Regarding this Serbian version, researcher Dezső Szegedy has proved that it is one of the variants of a very widespread type of historical narratives, of Iranian-Caucasian origin (ibidem). Therefore, it is not disputed that in the Serbian folk

tales about Janko Sibinjanin's origins the motifs of national tradition and those of foreign origin intertwine and blend (ibidem).

In the 19th century, several researchers were concerned with John Hunyadi's (János Szebeni, Janko Sibinjanin) origins; thus, among others: Vilmos Tolnai, Ferenc Toldy, József Székács, and Gusztáv Wenzel, who heard the Serbian version about Janko Sibinjanin directly from Vuk Stefanović Karadžić (Szegedy 1917: 35–42). According to this version, Janko Sibinjanin was the illegitimate child of Serbian despot Stefan (Visoki) and a Hungarian woman of noble origin. It also mentions the ring as a token of recognition, except that young Janko came with his ring to Serbia, to his father, showed it to him, who then let him serve in the Serbian army. In the first edition of his *Srpski Rječnik* [Serbian Dictionary] (1818), Vuk Stefanović Karadžić states that the conception took place on the initiative of Hungarian nobles who hosted despot Stefan and, seeing his grand stature and handsomeness, offered him to sleep with a young Hungarian noblewoman in order to have offspring (ibidem). This gesture is known by the professional literature as "sexual hospitality" (Čajkanović 1924: 1–24). According to Stefanović Karadžić, a Hungarian noblewoman gave birth to twins, a boy and a girl, and it had been previously agreed that if the child were male, he would be named Janko, and if she were female, she would be called Janka (Szegedy 1917: 35–42). When she grew older, the girl married and gave birth to Sekula Banović, who is often mentioned in Serbian epic folk songs in the company of his uncle (ibidem).

What the Serbian poetry and storytelling relates about Stefan Lazarević (son of Tsar Lazar) is that he grew up in Moscow and was the father of Janko Sibinjanin and the grandfather of John Székely (Banović Sekula). His wife was a Greek woman from the lineage of the Palaiologos Dynasty, and the title of despot was given to him by the Greek emperor in 1402. He fought against the Turks, as did his son Janko Sibinjanin (Szegedy 1917: 35–42).

The *Greek* version of Hunyadi's descent, which was, among others, recorded by Sima Milutinović Sarajlija in the first half of the 19th century (according to the narrative of Rade Knežević, a priest from Martinica), suggests that on one occasion Milica, Tsar Lazar's widow, asked her son Stefan to return home from Moscow. His journey with the army led him through Greece, and he asked the Greek king to let him have dinner and rest there with the army. The king allowed it but on the condition that he would leave behind a descendant. He agreed to that, and in the evening they brought him a nice slender Greek woman, with whom he spent three days. On the fourth day, the beautiful Greek woman complained to Stefan, asking him what she should do if she got pregnant and gave birth to a child. Stefan gave her a scimitar and a ring, saying that if she gave birth to a son, she should give the scimitar to him, and if she gave birth to a daughter, she should give her the ring – as a token and proof of fatherhood (Szegedy 1917: 35–42).

When collecting folk songs, in his collection published in Belgrade in 1878, Valtazar Bogišić also recorded one, which was entitled: *Despot Stjepan Lazarević and Sibinjka Girl, the Parents of Janko Sibinjanin.*[10] Analysing in detail the content and structure of that epic folk song, Rezső Szegedy establishes an unmistakable resemblance to foreign, more precisely to Iranian-Caucasian folk motifs, which can, in his opinion, be found in the historical narrative of *Rostam and Sohrab*, but above all in Ferdowsi's *Shahnameh*. This similarity, according to Szegedy, can by no means be accidental, but it gives the right to the assumption that this "travelling" motif from Iranian-Caucasian historical narratives, most probably from the period of the Turkish rule (as early as before the 17th century), entered Serbian folklore at a time when the Iranian and Caucasian peoples often traversed areas inhabited by Serbs and when the practice of raising the children of the South Slavs as Janissaries came to be established (ibidem). The 17th-century chronicle of Savina Monastery (Savinski letopis) also contains an interesting description of Hunyadi's origin, that is, conception. The text states that despot Stefan married the daughter of Kantakouzenos Palaiologos, who was barren and could not give birth to an heir for the Serbian despot. On one occasion, when despot Stefan went to the emperor with his entourage, he arrived in the Sibiu valley, where he stopped to spend the night at a Romanian man's house, who was called Bogut, or Budimir. When he saw his beautiful, young daughter, Ruta, he felt a burning desire. Seeing all this, the noblemen from this area searched for the mother of that beautiful girl and told her that the despot could not have children. The mother persuaded her daughter to have a relationship with the despot, and she did so in order to conceive a child with him. The next day, despot Stefan gave her a ring as proof of paternity in case she remained pregnant. Ruta soon gave birth to twins: Janko and Mandeljna (Jung 2006: 26–51).

It should also not be disregarded that in 1802 Hungarian author István Sándor, referring to Kraljević Marko, among others, also states that Serbs in their epic poems mention John Hunyadi under the name of Jankula (ibidem).

Hungarian folklorists and researchers also analysed in detail the folklore heritage related to John Hunyadi. According to the research of the esteemed ethnologist, Károly Jung, the first Hungarian source to mention John Hunyadi's origins, as the extramarital child of King Sigismund and Erzsébet Morzsinai, was a book by the court historian of King Matthias Corvinus, Antonio Bonfini, on the history of the Hungarians (*Rerum Ungaricarum decades*) written in Latin as early as the 15th century (Jung 2006: 26–51). At the same time, Byzantine sources of the period (Chalkokondyles, Doukas, and Sphrantzes) mentioned John Hunyadi under the name Janko. One of them who touched upon Hunyadi's origins and his youth is Laonikos Chalkokondyles (*Historiarum libri*). He tells us that Janko

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10   This poem entitled *Lazarevics István és a szebeni lány, Szebeni János szülői* was translated into the Hungarian language for the first time by Rezső Szegedy in 1917.

originated from the Transylvanian city of Hunyad, and he came to the court of a Serbian ruler, where he spent some time in his service. There he stood out due to his courage and perseverance. Laonikos also mentions the motif of killing a wolf, as an example of his courage. According to this Byzantine source, the young Hunyadi, before arriving at the court of the Serbian despot, also spent some time working as a stableman for Ali Evrenos. Hungarian historiographers assume that Laonikos could have heard the story of Hunyadi from Hungarian captives with whom he came into contact (Moravcsik 1922: 96–99).

The above-mentioned Bonfini's version was later taken over by Gáspár Heltai, who prepared and published the part of Bonfini's manuscript that referred to King Matthias Corvinus.[11] In Thuróczy's work, a ring motif also appears as a means of identification.

Towards the end of the 18th century, more precisely in 1787, Ádám Pálóczi Horváth formulated a *Hungarian literary version*, probably based on folk tradition, of Hunyadi's origins in one of his literary works, published in Győr.[12] According to him, this is the son of Hungarian Queen Mary and King Sigismund of Luxembourg (Moravcsik 1922: 96–99), and there are even two versions of the story. In one, John Hunyadi was born by Queen Mary in the Krupa Fortress, where she was held captive. She entrusted the boy to one of her officers, Butus, who raised him along with his own newly born child. The Bishop of Zagreb later mediated that the child, together with Butus, could flee to Rome. Mary was told the false news that his son, along with Butus, had been killed while trying to escape. In Rome, John Hunyadi was raised by priests until the death of Queen Mary. Then, the Pope, along with a ring obtained from her mother, which was a token of identification, brought the young Hunyadi back to Hungary, to King Sigismund (ibidem).

According to another variant, King Sigismund of Luxembourg's wife, Mary of Anjou, was already in the advanced stages of pregnancy when on one occasion she went horseback riding on her own. Somewhere in the Buda forest, she fell off a horse and broke her neck. Despite this, she gave birth to the child, prematurely, in the eighth month of pregnancy. It could not be known whether it was an accident or a murder. Either way, the public was informed that both the queen and the child were dead. The queen was buried, and the baby was secretly, with the consent of King Sigismund, given for adoption to Erzsébet Morzsinai, who then married Vajk, whose silence was ensured by the king by giving him the

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11 *Chronica az magyaroknac dolgairol, mint iöttec ki a nagy Scythiaból Pánnoniában, es mint foglalták magoknac az országot, es mint birtác aszt hertzegröl hertzegre es királyról királyra, nagy soc tusakodássockal és szántalan soc viadallyockal, mellyet Heltai Gaspar meg irta magyar nyeluen, es ez rendre hoszta az Bonfinius Antalnac nagy könyuéböl es egyéb historias könyuekböl nem kiczin munkáual.* Heltai Gáspárné, Kolozsvár. 1575.

12 *Hunniás,* vagy Magyar Hunyadi, az az Ama híres Magyar Vezér Hunyadi János életének egy egy része, mellyet a Vergilius Éneisse formájába öntve, négy sorú Magyar Strófákkal le írt Horváth Ádám. Győrben, Streibig Jósef betűivel. 1787.

Hunyad Estate so that the potential assassins would not find out that he had a living heir to the throne.

Due to the richness of the material, we cannot, of course, present in detail the attitude of each of the authors who dealt with the topic of Hunyadi's origins, but we should certainly mention that this was the most vivid topic in the 19th century, when the subject was dealt with by Vuk Stefanović Karadžić, Sima Milutinović Sarajlija, Valtazar Bogišić, and, as far as the Hungarian authors are concerned, by Mihály Románecz, Vilmos Tolnai, Ferenc Toldy, József Székács, Gusztáv Wenzel, and others. The first half of the 20th century brought some progress in the study of this topic, especially through the works of Rezső Szegedy (1917: 35–42), Gyula Moravcsik (1922: 96–99), and Istvan Lajti (1919: 181–182). This was followed by the researchers' detachment and lack of interest in this subject until in the second half of the 20th century, owing primarily to the professional works of Károly Kiss, Stojan Vujičić, and especially András Dávid and Jelka Ređep, the question of Hunyadi's origins came back into the focus of interest of the scientific public. Analysing the available material related to the topic of John Hunyadi/Janko Sibinjanin, Jelka Ređep concluded that it seems to her that Hungarian folklore had an influence on the Serbian folk tradition, since despot Stefan was a vassal of Hungarian King Sigismund, and the Serbian folk tradition about him was undoubtedly created under the influence of the Hungarian historical narrative on John Hunyadi's birth (Jung 2006: 26–51).

We mentioned above Gáspár Heltai from whom Dénes Lengyel was inspired when stating that John Hunyadi was the illegitimate son of Holy Roman Emperor and King of Hungary Sigismund of Luxembourg. He was also inspired by the chronicle of Antonio Bonfinius, who believed that John Hunyadi's father was a boyar named Buthi Voyk, a descendant of the Roman family of the Corvins, and his mother was a Greek woman from an imperial family.

5. Conclusions

Gáspár Heltai's opinion made a decisive contribution to the creation of historiographical traditions regarding John Hunyadi's origins. The central text for creating these traditions was the chronicle of Gáspár Heltai, who originated the Hungarian folk legend about King Sigismund's ring stolen by a raven. By combining the information from Bonfinius, Heltai forms his own opinion about the origin of John Hunyadi, which is the basis of Dénes Lengyel's work. This collector of epic folk tales is not an isolated case in terms of his opinion. The theories of Heltai and Bonfinius were taken over by almost all Hungarian historians from the 17th-18th centuries, as well as by some authors from the 19th century, who will interpret them in new ideological contexts of their time. Some

of those historians support the idea that John Hunyadi had Romanian origins and others that he had Hungarian origins.

The dilemma over the "appropriate" origins of János Hunyadi/Iancu de Hunedoara by the Hungarians and Romanians seems to have been resolved by a good connoisseur of the subject, András Kubinyi, who in his book on King Matthias Corvinus (Kubinyi 2001) stated that the Hunyadi family was of ethnic Romanian origin. According to him, this is also indicated by personal names used in the family and the fact that in the beginning the gubernator-to-be was called John *Olah* Hunyadi (Olah = Vlah) and later the "white knight of Wallachia" (the Romanian country). Therefore, there is no doubt as to his origins, though there have always been those who have challenged it (ibidem).

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World Literature and Translation in Persian Literature Textbooks

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Abstract. Persian literature textbooks, designed, compiled, and distributed by a state bureau run by the Ministry of Education, Organization for Educational Research and Planning, also have sections on the theory and practice of translating world literature. The current study deals with those passages, how they are represented and how they are consequently interpreted in the light of Venuti's conceptualization of domesticating and foreignizing translation. It is aimed to understand the status, significance, and visibility of translators in the corpus under study. The results of content analysis for the five high school literature textbooks (grades 6, 7, 8, 9, 10, 11, and 12) indicate a strong sense of domestication and appropriation by the compilers of the textbooks. The following strategies are recognized to have the largest share in the textbooks: no mention of the name of the translator, Iranization, and appropriation. The strategies are followed by samples for each theme. The paper concludes that the polyphonic world promised to be achieved by studying foreign and world literature is not, therefore, attained in such a context, as the emphasis is ultimately on the target ideologies and worldviews. The study also sheds doubt on the assumption that domestication is confined to the so-called imperialistic cultures like the Anglo-American.

Keywords: translation, world literature, textbooks, ideology, representation of foreign literatures

1. Introduction

Widely in circulation, school textbooks play an important role in representing discourses, thoughts, and ideas. In addition, they are capable of producing, instilling, and reinforcing those discourses and ideologies. In a country like Iran, millions of students are exposed each year to materials presented in these books. As a textual practice, therefore, they are involved in the creation of identities or discourses. The significance of these widely distributed books lies in the fact that they reflect the ideological view of the compilers and authors. "Since education is usually part of the public sphere and is regulated by the state", contend Apple and Apple, "it is also a site of conflict" (2018: 7); the conflict may be interpreted in our case as the one between critical literacy and uncritical acceptance, between ideology and science, between Self and Other, or between the domestic and the foreign. The point is even more significant in countries like Iran, where textbooks are exclusively produced, edited, and distributed by a central bureau run by the state. Accordingly, all of them are scrutinized by this bureau so that their content would not deviate from the official ideology of the state, particularly when it comes to textbooks in humanities such as philosophy, literature, religious teachings, geography, and history.

In what follows, we will first review the research into ideology, broadly defined, informing the practice of compiling school textbooks at a global level, and then proceed to review the materials related to the Iranian context. Thereafter, the method implemented and questions to be answered will be elaborated, followed by the analysis of our data, that is, the world literature pieces included in the schoolbooks. Finally, conclusions will be drawn and suggestions provided.

2. Previous studies

2.1. Studies related to the ideology of textbooks in the world

Texts of humanities are, quite naturally, carriers of ideology, more than the texts of the so-called exact sciences. Interpretation is essential to the former. The whole difference between the two areas may be summarized thus: "The truth about the Newtonian Bible is different from the truth about the Newtonian apple. The truth of the Bible requires the faith of the reader; the truth of the acceleration of gravity does not" (Bleich 1975: 745). The "truth" thus interpreted has consequences for human sciences: they will turn into a locus of power relations, which are, more often than not, unequal. Social discourses influence the making of textbooks, which has been the subject of many studies in historical research. For instance, Bernard (2003) deals with how ideology of a liberal state, Japan, has created

bias in the historical representations of World War II in Japanese high-school history textbooks; interestingly, Japan is a rare case of liberal governments with a centralized power for producing school textbooks.

In the context of the United States, where textbooks are not the exclusive monopoly of the state, Anyon (1979) refers to omissions, stereotypes, and distortions that have long remained in social studies textbooks across the country, which accounts for the powerlessness of native Americans, African Americans, and women. Focusing on economic and labour history from the Civil War to World War I, she observes that there used to be a misrepresentation of the economic aspect of the country in the content of the textbooks. Others, such as Zajda and Zajda (2012), analyse history textbooks in Russia and refer to ideological shift in interpretation and emphasis of national historical narratives which are incorporated in nation-building ideas and the positive representation of today's Russia. In Brazil, Francis (1995) analyses twelve EFL textbooks for value orientation, ideology, and hegemonic purposes, wherein ideology has been identified in statements pertaining to gender and race. Similarly, in a neighbouring country, Moss (2010) observed an eighth-grade history class in northern Colombia and analysed the teacher–student–text interaction where indications to historical determinism have been found in the transitivity and grammatical metaphors.

In the Chinese context, applying CDA methodological approach and examining selective representation of English, shallow linguistic explanations, and grammatical prescriptivism issues, Xiong and Qian (2012) explore how ideologies of English are discursively constructed as legitimate knowledge in Chinese high school EFL textbooks. In the same context, focusing on the comparison of the depiction of minority ethnic groups in two consecutive editions of China's most widely used secondary-level history textbooks in two decades in the context of political and ideological shifts, Yan and Vickers (2019) study the issue of incorporating ethnic minorities into the Chinese history textbooks, an issue that has been the subject of a vast number of studies (Chu 2015, 2017, 2018; Gao 2016).

2.2. Studies of ideology in Iranian school textbooks

As regards the Iranian context, there is a lack of seminal work on the intersection of ideology and textbook material selection. The few studies that are relevant to this field are the ones with focus on gender issues. For example, using critical discourse analysis (CDA) as the theoretical framework of their study, Ghajarieh and Salami (2016) investigate the representations of gendered social actors within equal educational opportunities for both genders in seven Iranian EFL books at secondary, high school, and pre-college levels. In the same line of research, results of Dahmardeh and Kim's study (2019), following the analysis of five new locally

developed ELT textbooks, suggest an imbalance in gender representations and a stereotypical image of females in Iranian English textbooks. By the same token, Karami (2020) analyses both the textual content and the visual representations of high school Persian literature textbooks. The results of the study indicate the underrepresentation of women and a pro-male bias in the analysed textbooks, which accounts for significant ideological issues that Iranian students encounter.

Apart from the latter, there are quite a few studies with a focus on the analysis of Persian literature textbooks. Zekavat (2013), for instance, emphasizes the significance of the inclusion and teaching of works of world literature at the secondary school level, as it makes students familiar with a dialogic and polyphonic world where variety is welcome. Shamshiri and Zekavat (2014) argue that world literature included in the textbooks advances a chauvinistic reading, which reinforces Iranian identity to the exclusion of others. Applying content analysis to the extracts of WL in textbooks, they conclude that these textbooks tend to erase the Other and replace it with the Self. They also argue that the share of world literature in these books is so "slim" that one cannot see the creation of a dialogic, polyphonic world for students reading them.

3. World literature and translations

Inclusion of texts, both original and translation, in textbooks is, to some extent, like anthologizing texts: both include "collecting, selecting, and displaying" and "evaluat[ing] 'collectibles' for a certain public, thus configuring and/or manipulating the reception of a foreign culture by native readers" (Seruya 2013: 2). The inclusion of translations may thus help shape the reception of the foreign elements in the target culture and be indicative of the general state ideology regarding the issue of the "foreign". The anthologizer / textbook compiler becomes a "secondary author", who is empowered to direct the interpretation in a context which denies, by its nature, access to the original text. In pedagogical contexts, translations go through multiple processes, which double the meaning of texts selected for inclusion. When selected for inclusion in textbooks, a translated text is further processed by the editors; it is prefaced, a summary is added, the author's biography is provided, and, more importantly, a certain reading of the translated text is imposed on it either directly or indirectly. What we see in the textbook has thus gone through the translators' and then the editors' filters, reaching the final destination – the users of textbooks. The question is how world literature is represented in such context and what the significance of translation and the translator in this representation is.

To answer the questions formulated above, translation should be considered from the perspective of rewriting. The present study investigates the representation

of world literature in six locally developed Persian literature (*Adabiyyat-e Farsi*) textbooks which have been in use in all Iranian schools for the final 6 grades, namely, grades 7, 8, 9, 10, 11, and 12. Chapter 8 of each one of these books is devoted to WL. The content of these chapters in the textbooks (Akbari Sheldareh et al. 2013, Ghasempour Moghadam–Akbari Sheldareh et al. 2019, Ghasempour Moghadam et al. 2018, Ghasempour Moghadam–Ebadati–Akbari Sheldareh et al. 2019, Ghasempour Moghadam–Ebadati–Vafaei et al. 2019, Ghasempour Moghadam–Ebadati–Sangari et al. 2019) is summarized in *Table 1*. All six books follow the same pattern in thematic categorization. For instance, they all have sections titled "Epic Literature" (*Adabiyyāt-e hamāsi*), "Lyrical Poetry", "Contemporary Literature" (*Adabiyyāt-e moʿāṣer*) as well as "World Literature" (*Adabiyyāt-e jahān*). In the previous versions of the books in circulation, the chapters were not organized, as they are in the new versions.

These textbooks are the ones that have been used since 2013 in the national curriculum. The researchers investigated the organization of the genre of the translated works used in the textbooks, the status of the authors within the Persian readers, the source language from which the work has been translated, and any indications of the translators' names.

The translator's invisibility, as Venuti defines it, originates from his work in Anglo-American culture, in which a translation is judged on the basis of the "transparency" of the discourse so that it should sound like an "original", not like a translation. The translator is thus rendered "invisible" in these cultures. The strategy associated with fluent discourse is what Venuti names *domestication*, which co-opts every foreign element and incorporates it into the dominant cultural formations and linguistic repertoire. The alternative strategy is what he dubs *foreignization*, in which the translator resorts to the marginalized elements in the domestic culture, including the stylistic, linguistic, or cultural elements imported from the foreign culture and text. The resulting translation makes the translator visible. These two strategies, by no means mutually exclusive, are, however, not restricted to the "dominant" cultures like Anglo-American ones. Any culture may have vested interest in translating fluently and domesticating translation (Venuti 2008).

As Venuti notices, translation, especially when it comes to the translation among "minor" and "major" cultures, is of great importance in world literature, which, as he mentions, is "hierarchical" in nature; following Casanova's line, Venuti asserts that "a minority status often drives a literature to increase its resources by translating texts from its major counterparts". A minority culture thus imports "forms and practices that its writers had not previously used", through which "prestige" accompanying the major cultures is transferred to the minor cultures involved. "A majority status", he maintains, "leads a literature to translate less because its broad range of forms and practices can sustain independent development" (Venuti 2013: 180–181). The corollary is that –

provided that we assign Persian a minor status – the Persian culture needs to translate from major cultures to enrich its literary trove. The implication of his statement is that minority status cultures assign more importance to translators and make them, as a consequence, "visible" – *contra* the major traditions. The strategies of "domesticating" and "foreignizing" translations he proposes follow the same argument: whereas a culture like the Anglo-American might have a tendency to domesticate a text translated from, say, Persian, the latter might opt for a foreignizing strategy that reveals the foreignness of the text through the choice of the text and the discourse developed to translate it. Such a reading of Venuti's theory, while holding water to some extent, is an oversimplification. All cultures, regardless of their status in the hierarchy of literatures, are capable of adopting both strategies. In addition, the strategies should not be regarded as a clear-cut dichotomy; they should rather be considered a continuum in translating discourses. Since translation is integral to world literature, it is impossible to deal with the latter without referring to how it was made available in a culture which does not have direct, unmediated access to it.

Considering the above definition regarding the translator's invisibility, overall, three main categories were recognized to be the subsets of what is meant by "translator's invisibility in Persian Literature Text Books" in the present paper.

4. Persian literature textbooks

Before these new versions came into use in 2013-2014, textbooks in use had been of a different nature. Organized according to roughly similar genres, the older textbooks had a dedicated section to WL. These books, however, feature this section in Chapter 4 rather than in the final one. In the old system of education in Iran, which divided school years to 5, 3, and 3 + 1 years for elementary, middle, and high schools, respectively, we observe another pattern. Students were granted a *dīplom*, or high school diploma, after finishing the third grade of high school, but if they aspired to go to university, they had to have another year of education, known as *pīsh-daneshgāhī*, or "pre-university". The textbooks of grades 1 to 3 followed the same pattern, whereas the literature textbook for the pre-university was totally different. In the latter, we do not see a section devoted to WL but a section titled "Translation".

While the texts chosen to be included in the old versions of textbooks feature names which are more familiar or "canonical", the newer versions opt for lesser known authors and texts. Furthermore, the early editions included other texts from authors such as William O'Henry, which were removed from later editions. In addition, there are some other extracts from foreign or translated literature, such as from Beecher Stowe's *Uncle Tom's Cabin*, scattered through the textbooks;

Stowe's text, for example, is included in the 2nd-grade textbook under the topic of "Resistance Literature". So is a poem by Mahmud Darwish, a Palestinian poet. These are indicative of the fact that it is not feasible to have clear-cut categories of all genres in literature. This blurred boundary among genres makes it difficult to decide where WL should be inserted.

5. Methodology

To determine the status of translators within the WL section of Iranian literature textbooks, we analysed the content of literature textbooks in grades 6, 7, 8, 9, 10, 11, and 12. Furthermore, all the charts, diagrams, and images were analysed to better understand how the literary texts are presented to the Iranian students. All the texts were systematically read, and the analysis resulted in some themes which can be taken as the embodiment of how translators are underplayed in the mentioned textbooks.

6. Findings

Overall, three main themes were extracted from the analysed texts. These themes account for the most dominant topics in view of translators that are underestimated in literature textbooks in Iran.

6.1. No mention of the name of the translator

Textbook 10 introduces the chapter on WL as follows: "Whatever we have covered so far in the book belongs to the intellectual, spiritual, and geographical space of our home, Iran. We are going to deal with texts, poets, and authors who portray [the space] beyond Iran's cultural geography and show us the issues of other lands or human matters raised in the world" (p. 132).[1]

Additionally, the introduction claims that the students will get familiarized with the "prominent people's thoughts, nations' thinking" and "prominent works" of WL. The "geographical space" mentioned in this extract refers to Persian literature proper, thus drawing a distinguishing line between Persian and foreign literatures.

One of the main recognized themes was the tendency to not refer to the names of the translators throughout the books. The books follow an identical pattern in which an introductory note is given at the beginning of each chapter; then the main text is introduced, wherein the name of the writer and, very rarely,

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1   Translated by the authors.

the name of the translator is given, followed by some exercises at the end of each lesson. In fact, our analysis revealed that among all 21 lessons dedicated to WL in the textbooks of grades 7 to 12 of first and secondary high school levels, only in four can we see the name of the translator (*Table 1*). It should be added that a complete bibliography is given at the end of each coursebook, where full details, including the name of the author, the name of the translator, the place and year of publication, are presented. Nevertheless, the present study focuses on each lesson where the name of the writer is mentioned without mentioning the name of the translator, given that the immediate space after the literary passage is where the readers look for the provenance of the work.

More interestingly, not all translators are effaced from the end of extracts. Seemingly, the editors opt for effacing translators when they are less known or celebrated. If the translator happens to be a well-known man of letters, the textbook indicates his name after the extract. One such case is Daudet's translator – Abdulhusayn Zarinkub (1923–1999) –, who is not, curiously, erased from the text. This visibility seems to stem from the cultural capital accrued by the translator: the students may not know Alphonse Daudet, but there is a high probability that they know who Zarinkub is. The translator's status in Persian culture is indeed different from that of in Anglo-American culture, but one must notice the degree of such attitudes.

6.2. Iranization

The objective of including WL in the curriculum of Persian language and literature in Iranian high schools is, as the textbook states, making students familiar with the thoughts of people in other parts of the world. The texts and authors selected for this purpose and the strategies employed in introducing them are, nonetheless, indicative of the fact that the editors have failed to do so. Venuti argues for a strategy in translating foreign literatures into English – he calls it "foreignizing" as opposed to "domesticating". These strategies are rather ethical attitudes towards foreign cultures. The extracts included in the textbooks tend to depict a literary world that is not that different from the domestic one. This is even reinforced on lower levels by the choice of native *Shekastah* (cursive) fonts for the texts, giving the text an appearance of being domestically produced. Embedding the extracts in these fonts and pictures, which integrates them into the rest of the textbook, is telling enough.

An image from the textbook for grade 9 ornaments a piece by Victor Hugo. The native *Shekastah* font and the picture of a veiled female character is symptomatic of the editors' approach to WL. This also refers to the inherent contradiction in the censorship of the representation of the foreign. What do the textbooks try to achieve when introducing a foreign element which is overtly Iranicized?

Another instance of such domestic animation accompanying a translation is in the textbook for grade 11, in which a piece by Gibran Khalil Gibran (146) is embedded in the picture of a baker with a piece of bread in his hand. What makes it domestically originated is that the bread he is holding is *Sangak*, a type of Iranian bread baked over pieces of hot pebbles or rocks – hence the designation *Sangak*, *sang* meaning "stone" in Persian. The Iranicized image seems to be incongruous with the general setting of the piece – an image that further embeds the foreign material in the domestic context.

6.3. Appropriation

The editors constantly change their interpretative approach. In Qabbani's poem, for instance, one may see the editor's extratextual or historical approach more readily than one may see in, say, Bach's. The editors try to reinforce, and even impose, the reading they prefer on the students by raising questions at the end of each unit.

There are three types of question after each piece: those dealing with language called "Linguistic Domain", those dealing with literary devices, or "Literary Domain", and those addressing the issue of interpretation called "Intellectual Domain". In the exercises following Qabbani's poem, a question is asked regarding the interpretation of the poem:

> Question 2: In the following lines "O land from which/wheats are grown/ and prophets rise", A) Which land is addressed? and B) What does the poet mean by the second and third lines?

The student is, to use a strong term, forced to interpret the piece the way editors want them to. Also, the interpretations of WL are given an air of comparative literature, and the extracts are connected to domestically written literature. Although it is not surprising to interpret foreign literature in terms of domestic literature, the emphasis on this move betrays a sort of "ethnocentrism" that disregards differences. All efforts in translation are to show that difference which is removed by flattening the text.

Furthermore, and apart from the problem of appropriation, another issue is the selection of authors in such texts. Choosing appropriate texts, authors, languages, and cultures for textbooks is a task full of difficulties. Which authors best represent WL is a question that has influenced many factors, including the needs and market for each individual author in the literary and translation history of a country. A review of foreign, mostly Western, authors canonized in the Persian context reveals a great number of authors each holding sway during various periods in the Persian literature, never fading into insignificance though. The list

is populated with writers from the West, such as Charles Dickens, Thomas Hardy, Charlotte Bronte, Emile Zola, or Jules Verne. Surprisingly, most of these authors are not represented in the textbooks, whereas the book market is very keen on these particular authors. This is not to say that the representation is wrong but that is lopsided. Even in the case of William Shakespeare, who is well-known by Iranians, only his sonnets have made their way into the books, while his plays, immensely popular in Iran, are not represented therein.

Table 1. *World literature in Persian literature textbooks*

Grade	Title of the lesson	Author	Original language and country/region	Genre	Translator's name	Mention of translator's name in the lesson
7	Lesson 16: The robot and the moth	Vytautė Žilinskaiitė	Lithuanian	prose	Nahid Azadmanesh	Yes
	Lesson 17: We can make it	Jack Canfield and Mark Victor Hansen	English	Prose	Parvin Ghaemi	No
	Recital: The old sage	Abdulrahman Dieji and Mohamamd Ghasa	Turkmen	prose	Fatollah Didehban	Yes
8	Lesson 16: Bird of freedom	Mahmud Darwish	Palestine, Arabic	poetry	No	No
	Children of stone	Nizzar Qabbani	Arabic	poetry	Abdolreza Rezaqeinia	Yes
	Lesson 17: The way to happiness	John Lubbock	English	prose	Abolghasem Payandeh	No
	Recital: Over the window	Editor	-	prose	Sara Tehranian	No
9	Lesson 16: Wish	Victor Hugo		poetry		No
	Lesson 17: The little prince	Antoine de Saint-Exupéry	France, French	prose	Mohammad Ghazi	No
	Recital: Two painters	Robert Fisher	English	prose	Seyed Jalil Shahari Langeroudi	No
10	Lesson 17: The dawn	Nizzar Qabbani	Syria, Arabic	poetry	Mohamad Shekarchi, Nahid Nasihat, and Seyed Hadi Khosroshahi	No
	The poet's tomb	François Coppée	France, French	prose	-	No
	Lesson 18: The greatness of sight	Andre Gide	France, French	prose	Mahasti Bahreini	No
	Recital: Three questions	Leo Tolstoy	Russia, Russian	prose	-	No

Grade	Title of the lesson	Author	Original language and country/region	Genre	Translator's name	Mention of translator's name in the lesson
11	Lesson 17: Silence of the sea	Rabindranath Tagore	Indian, English	poetry	A. Pashaei	No
	The embodiment of love	Kahlil Gibran	Lebanese-American, English	prose	-	No
	Talismans	Johann Wolfgang von Goethe	Germany, German	poetry	Koorosh Safavi	No
	Recital: *Jonathan Livingston Seagull*	Richard Bach	US, English	prose	Soodabeh Partovi	Yes
12	Your smile	Pablo Neruda	Chile, Spanish	poetry	Ahmad Poori	No
	Traveller	Friedrich Schiller	Germany, German	poetry	-	No
	Eternal love	William Shakespeare	England, English	poetry	Omid Habibzadeh	No
	Recital: from Contes du lundi	Alphonse Daudet	France, French	prose	Abdolhossein Zarrinkoob	Yes

7. Conclusions

The point of departure in our study, in comparison with those focusing on the issues of gender or Persian literature's position amongst the postcolonial literatures, was that WL is not represented well in the schoolbooks of Persian literature taught in all Iranian schools. Our analysis suggested that translation was underestimated in this context, giving rise to contradictions in the treatment of WL.

While many scholars, particularly those working from within a postcolonial paradigm, assert that the cultures assigned a minority status in world culture are not capable of producing foreignizing translations – as if producing such a translation were a merit *per se* –, our study indicates how the Iranian culture is wont to produce strongly domesticated texts to be consumed in a medium involving a large number of readership. Like Shamshiri and Zekavat, who believe that Iranian culture has a chauvinistic tendency to erase the foreign, we maintain that all these domestication methods – adopted once by the translators and, more significantly, by the textbook compilers – are of a different nature; they seek to defend themselves against the foreign incursions onto the domestically produced content. In view of the Iranization at work in introducing the students to WL, what sounds quite contrary to our conclusions is that the textbooks create a multicultural or "polyphonic" world in the chapters devoted to the topic. Insofar

as the passages, the way they are presented to students, and the visual content accompanying them disregard, or erase, the foreignness which is the fulcrum of the purported dialogic and polyphonic world, the books cannot claim to have made a difference.

The issue of interpretation is at the heart of reading and enjoying literature, which a student – inexperienced in the practice – is deprived of in the textbooks. The so-called original literary texts are also given a single meaning by the teachers at school, and the cross-national university entrance exam called *konkūr* puts multiple-choice questions to students, limiting the literary interpretation to the minimum. WL pieces are not an exception to this rule; students are demanded to agree with the teacher's interpretation of a passage and even memorize that certain reading for later reproduction at the final exams and at the *konkūr*. Reduction of meaning to a single phrase or stating the theme of a passage or text is carried out by the introduction of questions that are, in some cases, ideologically motivated, directing the student towards that certain reading. We believe the textbooks could have benefited from giving some leeway to the students to experience and explore literature on their own.

Azadibougar names two factors which impede the recognition of the foreign literary tradition in the Persian context: "a growing nationalist and cultural provincialism that is disseminated through departments of Persian language and literature" and "a Eurocentrism that is popularized through departments of English, French and German" (Azadibougar 2018: 232). Our research findings imply that "cultural provincialism", which is a reformulation of domesticating translations, may be the case with the translation passages included in the literature textbooks. That is to say, a sort of nationalism is discerned here which, as we stated above, does not come to be recognized as chauvinistic but rather as having a xenophobic nature in view of the fact that the state-sponsored books need to be blocking the image not favourable for the state ideology. Whether Azadibougar's first assertion holds water against the review and analysis of publications, either privately or state-owned, may be the topic of a separate study. As regards Eurocentrism rooted in the departments of European languages, our findings tend to refute such an interpretation to some extent. The corpus of texts represented in the textbooks is variegated, picking up samples from Arabic, Chilean, and Lithuanian literatures, among others – a fact that exonerates the textbooks from the Eurocentric charge. Quite opposite to that, we assume that the European, not least English, literature(s) are underrepresented in the textbooks under discussion for the inclusion of the samples do not do justice to the canonical status of English authors in Iran, particularly since the second Pahlavi era, when English began to be recognized as the most frequently used foreign language in Iran.

The notion of translation developed in some textbooks harks back to the conceptualization of the era of simplistic, pre-translation studies. Reducing

the whole translation process – a complicated practice by nature – to using dictionaries is what the non-professionals in the translation market of Iran do. Interestingly, mentioning translation, although in passing and *passim*, fails to fulfil the task the unit on the translation theory is assigned: while a student is not offered any clue to regard the texts purported to be WL as such, they are ill-positioned to digest translation practices.

Given the importance of ideology in textbooks, and returning to our earlier points regarding textbooks, it appears necessary to do more research into this cultural and textual practice. The research may pivot around the issues of gender, power relations, interpretation, and truths, among others, both in humanities and sciences.

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Acquiring Intercultural Communicative Competence through Virtual Exchange

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Abstract. Intercultural communicative competence (ICC) is an indispensable skill when interacting with people from other cultures, given the clash of perspectives that intercultural encounters may bring about. Being a skill that can be taught and learned, there is a wide concern for developing ICC through formal education. This involves designing specific training tasks that can enhance the acquisition of ICC with the help of virtual exchange (VE) activities.

The aim of the present paper is to highlight a specific way in which the educational goals associated with ICC development can be achieved. To this end, an analysis of 55 eTwinning intercultural projects has been conducted in order to determine the relationship between ICC and VE.

The statistical data described here indicate that VE fosters the development of ICC. Moreover, they are indicative of the fact that the VE task types that are most effective in the development of ICC can be identified through computation.

Keywords: intercultural communication, ICC, virtual exchange, eTwinning

1. Introduction

Intercultural encounters happen all the time, offline and online, for professional, social, and personal reasons. Political or business meetings, medical or educational settings, online games or social website contexts in which one part is of a different culture are very common.

An intercultural encounter, obviously, requires sharing a language. The communication process requires sharing a culture (Hofstede et al. 2010). Auwalu Issa (2015) argues that culture is the result of the process of communication within a community. In the scholarly literature, two opposing views of the process of communication stand out. One describes communication as a one-way process, "a transmission of information, ideas, emotions, skills, knowledge,

by using symbols, words, pictures, figures, graphs or illustrations" (Seema 2010 in Auwalu Issa 2015: 3), while the other refers to communication as a two-way process that consists in "an exchange of ideas and feelings between individuals in a society, with a hope of feedback" (Pate–Dauda 2015, in Auwalu Issa 2015: 3–4). In an intercultural exchange, the message encoded by the sender projects a different perspective than that of the receiver, and it is likely to end up in false interpretations, cultural misunderstandings, or even conflicts (Bhabha 1994).

With this in mind, this study attempts to answer the following question: how can VE determine the development of ICC?

The discussion below will begin with some considerations on the nature of ICC as reflected in the scholarly literature and its components (section 2). It will then go on to recap the strategies currently proposed for ICC development within the formal educational paradigm (section 3).

2. The nature of ICC

Perry and Southwell (2011: 455) give a succinct interpretation of ICC, describing it as "the ability to interact effectively and appropriately with people from other cultures". Byram (1997), on the other hand, builds a framework that extensively characterizes what appropriately and effectively literally refer to knowledge, skills, attitudes, and critical awareness.

To Byram's model, Müller-Hartmann and Schocker-von Ditfurth (2007, in Vos 2018) later added valuable insights that help understand the original model. In what follows, the focus of the discussion is on Byram's (1997) framework since it has a significant bearing on the analytical part of the present paper.

The knowledge component is targeted at grasping the defining features underlying both cultures in contact or, in Byram's own words, "knowledge about one's own and the other's culture, knowledge about social processes and social interactions" (1997: 35). In this connection, Finkbeiner (2009: 154) makes an excellent association between having knowledge of other's perspectives and a "cultural GPS" (global positioning system) that helps understanding various settings.

With regard to adopting the right attitude, Keller (1999: 14) argues that "attitude is everything:" an individual with the appropriate attitude does something towards smoothing the differences of perspectives that intercultural encounters bring about. As for attitudes, "curiosity, openness, readiness to suspend belief about one's own and disbelief about other cultures" (Byram 1997: 34) are key elements in dealing with other perspectives. He advocates for an ethnorelativistic stance, or, as he puts it, the individual's ability to "decentre", which he defines as "the ability to see how own values, beliefs, behaviours might look from the

perspective of an outsider who has a different set of values, beliefs, behaviours" (Byram 1997: 34).

The abilities above rest upon two different sets of skills. One set consists of skills that enable individuals to mentally correlate their knowledge of both cultures. Specifically, Byram identifies them as "skills of interpreting and relating [that] consist in the ability to interpret a document or event from another culture, explain and relate it to documents or events from one's own culture" (1997: 37). Müller-Hartmann and Schocker-von Ditfurth (2007, in Vos 2018: 43) explain the skills of interpreting and relating as the art of understanding the other.

The other set includes social learning skills, or, as Byram puts it, "skills of discovery and interaction [that] consist in the ability to acquire new knowledge of a culture and cultural practices and to operate knowledge, attitudes, and skills in real-time communication and interaction" (1997: 37–38). Apart from attitude (see above), collaborating with people from other cultures requires an aptitude to adapt quickly to new situations (Müller-Hartmann–Schocker-von Ditfurth 2007, in Vos 2018: 43).

Critical cultural awareness, an ability that has been found to support language acquisition (Nugent–Catalano 2015) is the centrepiece component of Byram's model. It refers to the ability to take "a critical perspective on one's own culture and a critical evaluation of the other's culture" (Byram 1997: 53). Browne and Keeley (2012, in Jatiningsih et al. 2019: 696) explain critical awareness through the use of critical thinking in reconsidering one's own beliefs, perspectives, and behaviours. Müller-Hartmann and Schocker-von Ditfurth (2007, in Vos 2018: 43) observe that interacting with people from other cultures imminently implies an evaluation of the other's perspectives, attitudes, and behaviours.

ICC can be achieved either informally, by going abroad and living in another culture, or formally, in the context of the classroom. From this point forward, the focus of the discussion is on acquiring ICC in the classroom environment.

3. Acquiring ICC through formal education

Along with the interpretation of Byram's (1997) model, Müller-Hartmann and Schocker-von Ditfurth (2007, in Vos 2018: 43) suggest a range of tasks geared towards acquiring ICC at each stage, in the context of the classroom. With respect to acquiring knowledge, Müller-Hartmann and Schocker-von Ditfurth (2007, in Vos 2018: 43) recommend "watching films, reading texts, searching the Internet, and making use of authentic material".

Regarding sparking curiosity and inciting interest, the authors are of the opinion that it can be achieved via "brainstorming and [using] visual aids, written texts about other cultures, literature, songs or interviews, virtual and face-to-face

meetings". They also consider that appropriate tasks targeted at developing the necessary skills are "writing new scenes, role plays, games, chats, study visits, and ethnographic observations".

The Council of Europe put forward reflection and discussion as the most important tasks through which students can analyse different perspectives (Lindner–Méndez Garcia 2014: 233).

Two frameworks, namely the Autobiography of Intercultural Encounters (AIE) and the Autobiography of Intercultural Encounters through Visual Media (AIEVM) that guide students to describe, interpret, and evaluate their own intercultural experiences have been designed in this respect.

Over the time, the ways to acquire ICC have multiplied and diversified, as shown by the range of activities and classroom tasks listed below. In a nutshell, they involve:

1. lectures, readings, films, multimedia presentations, and creative writing – in Gudykunst et al. 1977, Tudorache 2012, Navaitienė et al. 2013;
2. dialogues and discussions – in Brislin–Yoshida 1994, Kramsch 1998, Guilherme 2000, Finkbeiner 2009, Tudorache 2012, Navaitienė et al. 2013;
3. role play – Brislin–Yoshida 1994, Gudykunst et al. 1977, Arakelian 2009, Navaitienė et al. 2013, Reid 2015;
4. simulations – Gudykunst et al. 1977, Spodek 1983, Tudorache 2012, Navaitienė et al. 2013;
5. teaching specific behaviours, cultural assimilation, cultural capsule, cultural island – David 1972, Gudykunst et al. 1977, Reid 2015;
6. interactions, study abroad, and virtual exchange collaborations – Brislin–Pedersen 1976, Gudykunst et al. 1977, Tudorache 2012, Navaitienė et al. 2013;
7. reflections – Arakelian 2009, Tomalin 2009, Tudorache 2012, Lustig–Koester 2013, Navaitienė et al. 2013;
8. ethnographic tasks, writing autobiography or biography – Finkbeiner 2009, Navaitienė et al. 2013;
9. research – Reid 2015;
10. cross-cultural analysis, comparison – Robinson 1985, Finkbeiner 2009, Tomalin 2009, Reid 2015, Tudorache 2012, Navaitienė et al. 2013;
11. reformulations – Reid 2015;
12. observations – Reid 2015;
13. predictions – Reid 2015;
14. storytelling and image-making – Navaitienė et al. 2013;
15. project work – Navaitienė et al. 2013.

Not all of these activities can be adapted to distance working. Those tasks that can be adapted to working remotely will be considered in section 4.

4. How VE can help

VE refers to encounters that are organized in institutional settings, take place over the Internet, and involve students from different countries. VE can assist ICC development by providing an environment for the acquisition of knowledge and the practice of skills, as well as by enhancing motivation, changing negative attitudes, and fostering critical awareness. Navaitienė et al. (2013: 36) consider that experience, i.e. interaction with people from other cultures, is a very productive way of acquiring intercultural competence: "experiential learning or learning by doing is more effective than lecturing as it may include the methods of experience, comparison, analysis, reflection and cooperative activities".

Lindner and Méndez Garcia (2014: 231) raise awareness of the fact that the intercultural dialogue should be designed so that "it purposefully takes the participants out of their comfort zones". Therefore, if the tasks are masterly outlined so that they provoke an inner crisis, then the participants get to acknowledge and respect the cultural differences (Schneider–von der Emde 2006: 183).

With the help of technology that supports interaction, students of different cultures can develop collaborative projects. Collaborative learning implies dialogue, and dialogue supports understanding, skill development, and the building of new knowledge (Motteram–Forrester, 2005: 283). Hockly (2014) assesses the research of VE from 1990 to 2014. She reaches the conclusion that "the success of an online intercultural exchange project is not dependent on the technology put in use, but on the pedagogical framework and task design" (2014: 5). The interaction can be synchronous, in the form of in-class discussions, or asynchronous, involving the use of forums or emails.

O'Dowd and Ware (2009: 176) analysed more than 40 articles reported in international journals and edited collections, and they compiled a list of 12 task types and their intended outcomes put in use during VEs. Their typology is based on the educational objectives that VE is expected to cater for:

Table 1. *O'Dowd and Ware's (2009: 176) VE task types*

Virtual Exchange Activities	Intended Outcomes
Analysing cultural products	Awareness of target culture Awareness of one's own culture
Authoring "Cultural Autobiographies"	Establishing personal relationship with partners Increased awareness of cultural differences
Carrying out virtual interviews	Development of intercultural communicative competence
Carrying out "closed outcome" discussions	Negotiation of meaning Development of communicative competence
Collaborating on product creation	Development of intercultural communicative competence
Comparing class questionnaires	Awareness of different cultural meanings

Virtual Exchange Activities	Intended Outcomes
Comparing parallel texts	Increased awareness of target culture and one's own culture
Engaging in informal discussion	Development of communicative competence
Exchanging story collections	Cultural knowledge
Making cultural translations/adaptations	Development of intercultural communicative competence
Transforming text genres	Cultural awareness Communicative competence
Translating	Communicative competence

5. Analytical framework of the present research

The analytical framework of the present research is based on a systematic review of the scholarly literature in the field, as summarized in sections 2 and 4 above. It consists of a benchmark made up of the five criteria found in Byram's (1997) ICC model and the 12 task types for VE listed by O'Dowd and Ware's (2009). They will be briefly outlined below.

5.1. *Knowledge* refers to having acquired cultural knowledge of one's own and/ or of the partners' culture such as: the school, the town, the country, way of living, traditions, customs, etc. Scientific knowledge is not included for ICC evaluation.

5.2. *Skills of discovery and interaction* point to collaboration and cooperation skills, based on the ability of seeing the other's perspective.

5.3. *Skills of interpreting and relating* label globally the ability to grasp cultural differences and/or similarities.

5.4. *Attitude* refers to becoming tolerant, adopting a positive attitude towards oneself and the other.

5.5. *Critical cultural awareness* labels one's ability to be critical with regard to oneself, to one's own perspective of seeing things.

5.6. *Analysing cultural products* points to activities of analysing information such as texts, images, or videos.

5.7. *Authoring "Cultural Autobiographies"* stands for activities of presenting one's own school, town, country, traditions, or customs, writing a story, or creating an artefact.

5.8. *Carrying out virtual interviews* consists in collecting answers to the same questions from respondents from both cultures.

5.9. *Carrying out "closed outcome" discussions* consists in dialogues on common themes, which often takes the form of a debate involving the whole class.

5.10. *Collaborating on product creation* designates activities of co-creation of a song, a story, a quiz, a website, etc. with partners of different cultures.

5.11. *Comparing class questionnaires* implies the existence of a quiz and displaying the results of the poll.

5.12. *Comparing parallel texts and/or cultural products* indicates the presence of activities that require identifying similarities and/or differences between equivalent productions in one's own and the other's culture.

5.13. *Engaging in informal discussion* indicates not only the presence of synchronous communication, such as chat or Skype meetings, but also participation in forums.

5.14. *Exchanging story collections and/or cultural products* indicates the presence of sharing work activities.

5.15. *Making cultural translations and/or adaptations* is used when a project includes the presence of translations of authentic materials such as songs, stories, poems, documents, etc.

5.16. *Transforming text genres* is an activity that consists in transforming a poem/song/video into a story or vice versa.

5.17. *Translating* refers to translation for communication.

6. Data collection and approach

Three types of projects are developed within the context of pre-university formal education. Projects on discipline-specific topics are widespread mainly among hard sciences. Most often they conclude with a contest. Joint projects involving schools and organizations are devised with the aim of preparing pupils for the workplace, putting them in connection with experts in the field. Intercultural projects aim at initiating pupils in collaborative learning with peers of different cultures.

Erasmus is the European programme for education, and it co-finances the eTwinning platform. The platform is devised for personnel working in schools in European countries, enabling them to communicate, collaborate, and develop intercultural projects. The projects are available online at the address: https://live.etwinning.net/projects. Being a collaboration between schools from different countries, each project is evaluated by the representatives of the European Commission in that country and can be awarded the National Quality Label (NQL).

A project that earns at least two NQLs is awarded the European Quality Label (EQL).

The criteria of measurement for an eTwinning Quality Label can be found at: https://www.etwinning.net/en/pub/benefits/recognition/etwinning-national-quality-lab.htm. Because the quality label criteria depend on the presence of activities such as pupils interacting with their partners and working collaboratively using methods such as problem solving, information gathering, research, comparative work, and role-play (e.g. artists, journalists, scientists, actors, technicians), I assumed that I would find ICC elements in the projects. The corpus that I analysed consists of 55 EQL-awarded eTwinning projects, all

of which had Romanian participants, used English as a working language, and were developed between 18.09.2006 and 25.01.2020. For each project, there is a description available in the "About" tab of the project website.

In the description of every project, I searched for the ICC elements that make up Byram's model and the VE elements from O'Dowd and Ware's framework. These criteria did not appear verbatim in the description of the project, but I identified them based on how Byram, and O'Dowd and Ware defined them and on how the project was presented on its webpage. The data resulting from the content analysis were employed to quantitatively evaluate the way in which eTwinning projects lead to the development of ICC skills by employing VE tasks.

The approach to the data in hand was statistical: for every type of ICC outcome from the Byram's framework identified in the project, I assigned 1 point. If the element was not found in the entire description, I associated 0 points. Then I calculated the sum of these values, representing the number of ICC components targeted by the project. In the same way, I proceeded for VE tasks, searching for the elements devised by O'Dowd and Ware and counting the tasks.

In order to interpret the data, I resorted to the theory of probability. I used correlation in order to determine the relationship between two phenomena illustrated by two sets of values. In 1896, Pearson introduced the formula for the correlation coefficient that determines whether two sets of data increase and/or decrease simultaneously, as follows:

$$\frac{(x_1 - \bar{x})(y_1 - \bar{y}) + (x_2 - \bar{x})(y_2 - \bar{y}) + \cdots + (x_n - \bar{x})(y_n - \bar{y})}{\sqrt{(x_1 - \bar{x})^2 + (x_2 - \bar{x})^2 + \cdots + (x_n - \bar{x})^2}\sqrt{(y_1 - \bar{y})^2 + (y_2 - \bar{y})^2 + \cdots + (y_n - \bar{y})^2}}$$

The correlation coefficient calculates the degree of similarity (Asuero et al. 2006: 41) between two ranges of values $x_1, x_2, ..., x_n$ and $y_1, y_2, ..., y_n$, where $\bar{x}$ is the symbol for the mean of the $x_1, x_2, ..., x_n$ values, and $\bar{y}$ is the symbol for the mean of the $y_1, y_2, ..., y_n$ values. Correlation is largely employed in research, especially in fields such as engineering, medicine, business, pharmacology, etc.

The correlation coefficient can vary between -1 and 1. Thus, when the correlation is zero, the two phenomena are statistically independent, which means that there is absolutely no relationship between them. When the correlation is 1, the variations of the two phenomena are identical. The correlation can also be negative, meaning that an increase in values of one phenomenon happens simultaneously with a decrease in the other. The Microsoft Excel software is equipped with the *CORREL* function, which measures the correlation coefficient between two sets of values.

7. Examples

In this section, a few examples illustrate the way in which content analysis has been put to use in order to determine the values for the ICC and VE criteria.

Example 1

In the project "You are the picture – Tu eres el cuadro" (https://live.etwinning.net/projects/project/129411), schools from Spain, Portugal, Italy, Romania, Turkey, Greece, Armenia, Poland, the Czech Republic, Ukraine, and France were involved, being devised for pupils aged between 15 and 19. I have identified acquiring cultural knowledge (5.1 above) and skills of interpreting and relating (5.2 above) from the ICC section in the following lines: "the project consists of photographs imitating famous paintings of the major European museums. Students pose and imitate the characters in the picture and then perform the picture." The sum of ICC components from the Byram's (1997) model is 2 because there is 1 point for each criterion.

With regard to the VE tasks, I have identified authoring cultural autobiographies (5.7 above) and collaborating on product creation (5.10 above): "study and interpret the works of art in our museums from different cultures". There is also the point for translating (5.17 above) and the point for making the project website (5.10 above). The sum of VE task types identified in this project is 4.

Example 2

The project "Getting to Know Each Other" (https://live.etwinning.net/projects/project/21065) involved schools from Poland, United Kingdom, Turkey, France, Latvia, Lithuania, Italy, Germany, Spain, Romania, Bulgaria, and Slovakia, being devised for pupils aged between 11 and 17. In the ICC section, I have identified two criteria consistent with those in my framework. I have counted 1 point for acquiring knowledge about one's own and the other's culture (5.1 above), because students are required to gather information about their own school, town, and country. Consequently, they learn about their partners' school, town, and country. Another point is set to attitude (5.4 above) because of the aims expressed therein: "reach positive conclusions about their own lives, as well as those in other cultures". Therefore, the value for ICC is 2 for this project.

The value for the VE criterion is 5; one point is awarded for analysing cultural products (5.6 above), because pupils are asked to "examine their school community, the local arena, their country and Europe". Another point is set to comparing cultural products (5.12 above) because they arrive at comparing their own ideas with their partners. One point is given because in the process of presenting their own school, town, or country they author cultural autobiographies (5.7 above). Another point is given to collaborating on product creation (5.10 above) activity,

because all information is uploaded on the website of the project. The other point is for translation (5.17 above) for communication.

Example 3

The project "Give 5: A Healthy Living Toolbox – the whole school program" (https://live.etwinning.net/projects/project/141675) involved schools from Poland, North Macedonia, Italy, Turkey, Spain, Romania, Portugal, and Lithuania, addressing pupils aged between 6 and 13. The score for the ICC criterion is 1: knowledge acquisitions (5.1 above) of the other's way of living are targeted in this project.

The score for the VE criterion is 4: one point is assigned for authoring cultural autobiographies (5.7 above), because students are required to create documents with regard to daily life in their own country, 1 point is set to collaborating on the product creation (5.10 above) task found in the line: "[t]he main result of the project will be the [t]oolbox", 1 point is assigned for the exchanging cultural products (5.14 above) task identifiable in the line: "transfer the best practices to partner schools and implement innovative practices", and 1 point is marked for engagement in the informal discussions (5.13 above) task found in the line "[d]uring the project meetings we will communicate face to face".

Example 4

The project "A Book Club" (https://live.etwinning.net/projects/project/155790) involved pupils aged between 15 and 17 from Bosnia and Herzegovina, Armenia, France, Italy, Romania, Bulgaria, and Slovakia. The score for the ICC criterion is 5 points as follows: 1 point for knowledge acquisition (5.1 above) as stated in the line "understanding of customs and traditions [...] that belong to other cultures", 1 point for skills of interpreting and relating (5.3 above), that is, "what is common, what is different from my national literature", 1 point for skills of discovery and interaction (5.2 above), as mentioned in the project description: "collaborative and creative skills", "negotiation", and "team working skills", 1 point for the critical cultural awareness criterion (5.5 above) reflected in the line: "raise awareness towards literature and global values", and 1 point for attitude (5.2 above), suggested by the reference to the idea of "tolerance".

For the VE tasks, the score is 7 points obtained from: 1 point for analysing cultural products (5.6 above) inferred from the phrase: "analysing information", 1 point for authoring cultural autobiographies (5.7 above) plus 1 point for exchanging cultural products (5.14 above) on account of "presenting and commenting upon our holiday read", 1 point for collaborating on product creation (5.10 above) due to the presence of "collaborative writing", 1 point for comparing cultural products (5.12 above) owing to the presence of "what is common, what is different from my national literature" and "get more information about works whose counterparts

you find representative", and 1 point for making cultural translations (5.15 above) as a result of the presence of "translations made by students of fragments they loved from the literary work they read". Finally, 1 point is assigned to translation for communication (5.17 above).

8. Data analysis

A relationship between ICC and VE is warranted by the correlation coefficient between the ranges of values for ICC and VE, whose value is 0.307714. Therefore, the VE activities developed in the context of eTwinning projects foster the development of ICC abilities.

However, it should be noted here that the eTwinning projects aim not only at developing ICC but also at pedagogical innovation, extensive use of technology, and curricular integration such as science, environmental issues, or entrepreneurship. For instance, when working on an experiment-based project in the field of physics, students practice only the skills of discovery and interaction (criterion 5.2) from the whole ICC framework because, in this particular case, all knowledge is related to science, not to culture.

In what follows, the correlation coefficients between the VE task types and ICC and the frequencies of occurrence for the VE task are displayed in *Table 2* below. The VE activities are ranked according to their correlation with ICC.

Table 2. *Correlation values between VE task types and ICC*

VE task type	Correlation with ICC	No. of projects in which the task is used
Making cultural translations and/or adaptations	0.912871	4
Carrying out virtual interviews	0.771744	4
Comparing class questionnaires	0.768273	5
Carrying out "closed outcome" discussions	0.644658	14
Engaging in informal discussions	0.282038	20
Exchanging story collections and/or cultural products	0.163461	47
Analysing cultural products	0	20
Authoring "Cultural Autobiographies"	0	46
Collaborating on product creation	0	50
Comparing parallel texts and/or cultural products	0	17
Transforming text genres	0	0
Translating	0	46

The highest correlation value, 0.912871, occurs in the case of tasks involving *making cultural translations and/or adaptations*. The data show that this is the most effective VE task type, and it was used only when the values for ICC were higher. Only 4 out of the 55 projects refer to *making cultural translations and/or adaptations*.

This activity is aimed at developing a good command of the foreign language and extensive knowledge of one's own culture as well as the other's culture. It also involves other VE tasks. In the first instance, pupils have to search for an authentic text, an activity that makes them develop skills of discovery, acquire knowledge of their own culture as well as appreciate and to some extent acquire a positive attitude towards their own culture (criteria 5.1, 5.2, and 5.4, respectively, above). Then they have to translate the text; translation entails explaining cultural particularities, which implies a prior analysis of the cultural particularities.

Their partners have to perform the same tasks. In this way, pupils acquire knowledge of their partners' culture (criterion 5.1) and, to some extent, might appreciate the other's culture (criterion 5.4).

At the same time, pupils relate the elements from the other's culture to elements from their own culture, developing their skills of interpreting (criterion 5.3). Moreover, with a positive attitude, students can achieve critical awareness (criterion 5.5) by analysing and comparing features of their own and the other's culture. Thus, being involved in a project that includes *making cultural translations and/or adaptations*, students can develop all five components of the ICC framework. Therefore, the projects that include this task can record the highest ICC values.

Carrying out virtual interviews is the activity with the second highest correlation coefficient value, 0.771744. It has been employed in 4 out of 55 projects, namely the project where the ICC values are also prominent. *Carrying out virtual interviews* is an activity that implies a prior collaboration in order to create the interview, developing pupils' skills of interaction (criterion 5.2). Two ICC criteria emerge as a result of the interview: identification of similarities and differences between cultures (criterion 5.3) and awareness of the other's perspective (criterion 5.1). Moreover, by becoming acquainted with the other's perspective, pupils might develop understanding and a positive attitude towards their partners (criterion 5.4). Thus, by participating in a project that includes *carrying out virtual interviews*, students can improve four components of the ICC framework.

Comparing class questionnaires, whose correlation coefficient is 0.768273, has been used in 5 out of the 55 projects. This task implies creating the questionnaire, which is an activity of product creation type. By working on a product creation task, pupils practice their skills of interaction (criterion 5.2). The main outcome of *comparing class questionnaires* is identifying differences of ideas that are likely rooted in cultural differences (criterion 5.3). At the same time, pupils acknowledge the other's perspective (criterion 5.1), which might lead to developing a positive

attitude towards their partners (criterion 5.4). Therefore, in case the topic addressed by the project is related to culture, engaging in a project that includes *comparing class questionnaires*, students can develop four components of the ICC framework.

Carrying out "closed outcome" discussions is a task that in most cases takes the form of a debate. The correlation coefficient for *carrying out "closed outcome" discussions* is 0.644658, which means that it also represents a very promising activity in the development of ICC. Through discussions, students practice interaction (criterion 5.2), negotiation of meaning, developing skills of interpreting (criterion 5.3), and relate knowledge about the other's culture to knowledge about their own culture, becoming aware of the other's perspective (criterion 5.1). By becoming familiar with the other's perspective, students can appreciate and develop a positive attitude towards their partners (criterion 5.4). As a result, being involved in a project that includes *carrying out "closed outcome" discussions*, students can improve four components of the ICC framework in case the topic of the project is culture-related. *Carrying out "closed outcome" discussions* is involved in 14 out of the 55 projects. However, the frequency of occurrence (which is 14) is considerably higher in comparison to the frequencies of occurrence of the previous tasks (which include 4 or 5 occurrences) due to the fact that not all discussions are related to culture. If the *discussions* are related to topics other than culture, then criteria 5.1 and 5.4 are not met, and the project addresses only three components of the ICC framework.

Engaging in informal discussions is an activity that has the correlation coefficient 0.282038, which means that it positively affects the development of ICC. The coefficient is not very high, meaning that the task has been included both in situations when ICC increased and decreased, 20 out of the 55 times. The task requires participants to practise interaction with peers from other cultures (criterion 5.2), which results in discovering the other's perspective (criterion 5.1) and noticing cultural similarities and differences (criterion 5.3). By becoming familiar with the other's perspective, students can develop a positive attitude towards their partners (criterion 5.4). As a result, in case the topics of the *informal discussions* are culture-related, students can improve four components of the ICC framework. The number of ICC components that can be enhanced by including *engaging in informal discussions* in a project is the same as in the case of including the *carrying out "closed outcome" discussions* task. The reason why the value of the correlation coefficient for *informal discussions* is lower than in the case of the *"close outcome" discussions* is the use of *informal discussions* in more non-cultural projects than in the case of *"closed outcome" discussions*.

Exchanging story collections and/or cultural products is an activity about which it has also been found to positively affect the development of ICC, having the correlation coefficient 0.163461. It was largely exploited, being used in 47 out of the 55 projects. It does not require much expertise being accessible to any level and amenable to any subject. The most important thing is the fact that *exchanging*

story collections and/or cultural products was employed in the situations when the values of ICC were higher and was disregarded when they were lower. This phenomenon happens because a project that uses *story collections and/or cultural products* has always a culture-related topic. *Exchanging story collections and/or cultural products* leads to identifying cultural similarities and differences, and thereby developing the skills of interpreting and relating (criterion 5.3). Moreover, the comparison of cultural products presupposes the existence of the products, which requires authoring a product or searching for an existing product, tasks that develop skills of discovery (criterion 5.2) and of acquiring cultural knowledge (criterion 5.1). Having acquired knowledge of the other's culture, students might appreciate their partners' culture, developing a positive attitude towards them and their culture (criterion 5.4). Thus, by participating in a project that includes *exchanging story collections and/or cultural products*, students can develop four components of the ICC framework.

For the activities involving *analysing cultural products*, *authoring "Cultural Autobiographies"*, *collaborating on product creation*, *comparing parallel texts*, *transforming text genres*, and *translating*, the correlation coefficient has been found zero. This means that there is no relationship between ICC and any of these tasks.

Collaborating on product creation is the activity that has been mainly capitalized in eTwinning projects, being found in 50 out of the 55 cases. *Collaborating on product creation* is the most important means by which intercultural communication is put into practice. However, no correlation with ICC has been found because, being employed too extensively, it makes no difference between the situations in which ICC increases or decreases. While collaborating on the creation of a product, students develop their skills of interaction (criterion 5.2). Thus, being involved in a project that includes *exchanging story collections and/or cultural products*, students can develop one component of the ICC framework.

Transforming text genres has never been used in any of these 55 projects; therefore, no relationship can be expected. Since it is an activity that requires a lot of expertise, it seems to be dispreferred by pre-university teachers. It requires analysing the text (which develops criteria 5.1 and 5.3, as shown below), a high level of knowledge about both cultures (criterion 5.1), and it also implies translating as well as making cultural adaptations afterwards (developing all five criteria of the ICC framework, as shown above).

Translating has also been counted quite often, being widely necessary in intercultural communication: 46 out of the 55 times. However, not all projects make use of translation. Some projects, especially those directed towards primary school pupils, consist in exchanging photos, artefacts and compiling the album containing all these cultural products; they use too little conversation to be considered a formative activity. The task leads to foreign language acquisition.

Analysing cultural products implies the existence of the cultural products, being performed during an activity of product creation type. Therefore, it is plausible that the number of *analysing cultural product* occurrences, which is 20 out of the 55 times, is lower than *collaborating on product creation*, which is 50 out of 55.

Analysing cultural products aims at acquiring knowledge of one's own or the other's culture (criterion 5.1). At the same time, students could notice similarities and differences between cultures (criterion 5.3), and they might appreciate that cultural knowledge, developing a positive attitude (criterion 5.4). Thus, by participating in a project that includes the *analysing cultural products* task, students can improve three components of the ICC framework.

The task *authoring "Cultural Autobiographies"* involves searching the necessary information, developing skills of discovery (criterion 5.2), acquiring knowledge of one's own culture (criterion 5.1), and at the same time increasing appreciation towards one's own culture (criterion 5.4). Therefore, being involved in a project that includes the *authoring "Cultural Autobiographies"* task, students can develop three components of the ICC framework.

Comparing parallel texts and/or cultural products requires prior activities of authoring a text (aiming at criteria 5.1, 5.2, and 5.4, as shown above) or searching for a text/cultural product (training skills of discovery – criterion 5.2). As expected, the tasks involving comparisons occur with less frequency than those based on authoring: the ratio is 17 to 46 times.

Comparing parallel texts and/or cultural products helps not only the development of the pupils' skills of interpreting and relating (criterion 5.3) by identifying similarities and differences but also their acquisition of knowledge about their own and the other's culture (criterion 5.1) and the development of a sense of appreciation of one's own culture or the other's culture or both (criterion 5.4). Moreover, with a positive attitude, students can achieve critical awareness (criterion 5.5) by comparing features of their own and the other's culture. Thus, by participating in a culture-related project that includes *comparing parallel texts and/or cultural products*, students can develop all five components of the ICC framework.

Obviously, more research is necessary in order to determine to what extent the VE tasks are complemented by the ancillary tasks enlisted in the corresponding interpretations.

9. Conclusions

Intercultural encounters are very common in today's society, and putting together all the elements that characterize ICC was a real breakthrough. Various techniques for acquiring ICC have been put into practice, and the task types have

been refined. Institutions of higher education have shown a wide interest and set the scene for the development of intercultural collaborations between students.

With the advent of technology and the introduction of VE in schools, far more students could benefit from intercultural training. The present study focuses on intercultural training at the pre-university level. Making use of the eTwinning platform, the schools from European countries can develop collaborative projects.

Based on the description that accompanies every project, I used content analysis in order to find a relationship between the VE tasks employed and the targeted ICC abilities. Broadly, the activities for VE consist in those tasks designed for the acquisition of ICC that were adapted to the online medium.

The relationship between ICC and VE has been established through mathematical data processing. The results show that VE can assist ICC acquisitions. Moreover, the activities that make the VE compilation can be sorted according to the position they stand in relation to ICC. The most promising types of VE tasks in ICC development are then selected from the list.

Not all eTwinning projects are culture-related.

However, the projects that address topics other than culture further develop students' skills of interaction, cooperation, collaboration, and interpretation, necessary for intercultural communication, and they should not be overlooked.

Acknowledgement

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Change(s) in Vocabulary(/ies) – Hungarian and Romanian Lexical Phenomena During COVID

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Abstract. The COVID-19 epidemic caused not only an unprecedented crisis in our lives but also changes in our language use and word formation habits: this new disease and its cures have naturally led to the emergence of new concepts and names. In 2020, more and more words or phrases related to the COVID-19 epidemic appeared in the public sphere as a result of COVID-related publications issued by the World Health Organization, regulations issued by the authorities of the countries, news in the press, and endless debates in the social media. This study examines the lexicalization processes and semantic shifts generated by the COVID epidemic, as we aim to examine professional and colloquial developments in pandemic-inspired terminology. We analyse the changes that have taken place in the Hungarian and Romanian language environment, while also taking into account the English language elements as a background reference. Among the most notable lexico-semantic phenomena, we have identified word coinages, changes of meaning, and varied word formation techniques which have fostered the processes of lexicalization and neologism creation, revealing an impressive linguistic dynamic at the level of public discourse.

Keywords: COVID-19 terminology, semantic changes, lexical phenomena, Hungarian language, Romanian language

1. Introduction

To meet the needs of a rapidly changing social reality, each language employs a wide range of strategies to create new linguistic elements and generate new meanings, such as borrowing words from other languages to denote an emerging objective reality or concept (loan words), creating new words using the resources of our own language (mainly combination and derivation), or changing the meaning of existing words (semantic changes such as narrowing of meaning or broadening of meaning). As a result, the number of neologisms is constantly increasing, and thus languages are gradually changing, according to their internal laws and/or under the influence of other languages. The COVID-19 epidemic caused not only an unprecedented crisis in our lives but also changes in our language use and word formation habits. In addition to the enrichment of medical jargon and the common use of technical words, everyday language has been enriched with colourful and creative expressions from its own sources, as a result of creativity. The linguistic cavalcade has manifested itself first in the definition of the name of the disease. Severe atypical pneumonia caused by the unknown 2019-nCoV virus until the outbreak is listed under several provisional names (Chinese coronavirus, COVID, SARS COV 2, the new type of coronavirus, the novel coronavirus), although the WHO report officially named it COVID-19. The acronym is derived from the lexemes *corona*, *virus*, and *disease*, and the number *19* refers to the year in which the first cases were detected.

2. Aims, methods, and corpus construction

This study examines the lexicalization processes and semantic shifts generated by the COVID epidemic, as we aim to examine professional and colloquial developments in pandemic-inspired terminology. In the light of the *technolect* (i.e. medical language) and *digilect* (i.e. language of social media) generated by the pandemic, we analyse the changes that have taken place in the Hungarian and Romanian language environment, while also taking into account the English language elements as a background reference. We do not intend to undertake a quantitative, comparative analysis of the three languages since the specific agglutinative arrangement of English, the frequency of monomorphic words, the prevalence of suffixing, and word formation with other morphemes provide relatively considerable flexibility in the formation and transformation of words. The Hungarian language also offers a wide range of possibilities in this respect, as the Hungarian language also uses agglutination, as a result of which the words carry a complex meaning in a condensed form, as well as creative words reflecting a linguistic invention (*maszk* 'mask' – *antimaszker* 'anti-masker', *maszkozik*

'masquerade'). In contrast, the Romanian language is an inflected language, expressing grammatical relations by conjugation, derivation, and by changing the stem, and a limited number of suffixes can be used. This may also explain the fact that there are fewer new creations in the Romanian language area and more calque translations or loanwords.

The data collection process consisted of compiling a corpus of a total of 240 Hungarian terms related to the pandemic, which were grouped into subcategories, i.e. vocabulary related to symptoms, testing, vaccination, etc. The Hungarian terms were matched with their English and Romanian terms, using online media as their sources: e.g. index.hu, hu.euronews.com, portfolio.hu, maszol.hu, digi24. ro, realitatea.ro. The Hungarian corpus was collected from online sources, and during our empirical research it was divided into two main parts. The first part consists of the vocabulary related to the pandemic, which appeared on the official online (Hungarian and Romanian/Transylvanian) websites, namely: koronavirus. gov.hu, korona.rmdsz.ro. These official websites have been launched in order to provide up-to-date and reliable information related to the pandemic. The other part mainly includes COVID vocabulary and digilect units from the social media, focusing on the linguistic examination of two informative Facebook pages: one of them was created by a biochemist living in Transylvania, who posted regular briefings about the COVID (facebook.com/sziszi), while the other Facebook posts were written by a Hungarian doctor (facebook.com/koronasmesek), both being reliable sources regarding the disease and its vocabulary. The corpora were also compared with a recently published glossary (Veszelszki 2020).

As the aim of the research is to examine the linguistic globalizing effect of the pandemic, we observed the "contagious" emergence of English loan words in the Hungarian and Romanian texts. The main aspects of the analysis of the corpus are the phenomenon of loanwords and calques and the examination of the contact phenomena and the transfer phenomena between the professional language registers and the common language. We highlighted the emergence of specialized terms in the common language, focusing on the non-analogical changes of denotational meaning, comprising the classical quartet of specialization, generalization, metonymy, and metaphor and emotive meaning change: pejorative change and melioration (cf. Geeraerts 2009).

We have hypothesized that the normative language version largely contains loan elements and calques, while the everyday written and spoken language uses set in motion several linguistic inventions. Our second hypothesis is that the Transylvanian language version has fewer creative linguistic elements, and due to the contact effect of the Romanian language, other phenomena have also surfaced.

3. Analysis of the corpus

The corpus was collected and categorized according to the aforementioned research objectives.

3.1. Analysis of the Hungarian corpus

In the case of the Hungarian-language corpus, we encounter various word formation techniques, but at the same time the process of generalization can also be observed. According to Tamás (2014), the role of specialized terms is to make communication more efficient and faster. The emergence of specialized language is generated by specific communication needs (Kurtán 2003), but, similarly, due to specific needs, words and phrases brought about by the necessity of understanding the epidemic and the new situation appear with incredible speed. At the same time, domain-specific neologisms are much more permanent than colloquial neologisms (Vargáné 2016: 181). According to Heltai, although the elements of the specialized language are part of the common language, the existence of common language competence does not mean that we also have professional language competence (Heltai 2006: 37).

As a result of the pandemic, a large number of linguistic elements have been transferred from a specialized domain to the common language in a very short time, and became widely used. It is characteristic of the situation that some of the terms are provided with explanations, mainly in official statements and announcements. These represent the normative language version and accordingly seek to apply consistent terminology. In these statements, we encountered less jargon than on the analysed Facebook pages, and they often provide conceptual explanations. Facebook pages launched for educational purposes offer extremely rich material related to new terms. The comments also contribute to this, where we also encounter their abundant presence. Here, however, we can already observe great variability. Compound words are mainly grouped around concepts such as *epidemic*, *infection*, *contact*, *COVID*, *quarantine*, *symptom*, *immunity*, *vaccination*, *virus*, and so on. Another noteworthy phenomenon is the spelling of the terms, where we frequently come across the preserved foreign spelling (e.g. *PCR kit*), source-language and Hungarian spelling can be mixed (e.g. *post-covid szindróma* 'post-covid syndrome'), some terms often appear in phonetic transcription (e.g. *reverz* 'reverse'), but inconsistencies are also common, for example, related to PCR tests (*real-time PCR*, or *RT-PCR*).

A very interesting phenomenon is the emergence of the emotional charge of the terms, which indicates the process of de-terminologization and generalization. Abbreviations and acronyms (e.g. *koronavírus IgM/IgG gyorsteszt* 'coronavirus IgM / IgG rapid test') are common and are sometimes accompanied by explanations.

The Hungarian word *nyájimmunitás* 'herd immunity' has been markedly enriched with emotional charge during the pandemic. The emerging negative emotional charge or pejoration is clearly due to the role of the epidemic in initiating social processes and psychological effects (virus denial, anti-vaccination, etc.).

Another phenomenon is linked to the specialized lexemes that have been transferred into everyday language, i.e. the process of generalization. The most striking change in the vocabulary of everyday language is certainly the emergence of medical jargon terms. As indicated, these do not occur primarily in official news appearing on government websites but mainly in posts on social media pages or in informative articles in the press. They are also used in comments in online social media discourses. These terms and expressions are characterized by formal constancy; they are used in their original form in everyday speech. Their adoption and use intend to serve the accurate transmission of medical/biological concepts and to provide more reliability and convincing force to the information. They are used not only in press articles but also in everyday language when commenting on online social media sites, which indicates how important online social media users consider the use of terms in a given situation. These lexemes reveal much more about the changes in the vocabulary during the epidemic than the words of the former group, as these terms – although previously known to non-specialists as well – were mainly part of the communication in the specialized domain. Of these, we would like to highlight the following words as the most important lexemes of the pandemic: *járvány* 'epidemic', *fertőzés* 'infection', *immunitás* 'immunity', *vakcina* 'vaccine', *teszt* 'test', *vírus* 'virus'. The vocabulary of the epidemic has been expanded with the help of suffixes and prefixes or compound words.

Broadening of meaning can be identified in the case of lexemes that have become more frequently used in everyday language and show a change in meaning. The Hungarian word *járvány* 'epidemic' has clearly been used by non-specialists as well, but its concept has changed and expanded during the pandemic. It can be encountered mainly in compound words such as: *járványkommunikáció* 'epidemic communication', *járványkezelés* 'epidemic management', or *járványgörbe* 'epidemic curve'.

The lexeme *fertőzés* 'infection' can be found in several compound words and phrases such as: *fertőzőképes* 'infectious', *újrafertőződött* 're-infected', *fertőzési láncolat* 'chain of infection', *igazolt fertőzés* 'confirmed infection', *aszimptomatikus fertőzött* 'asymptomatic infected', *fertőzés reprodukciós rátája* 'reproductive rate of the infection'. Word-for-word translation can be further observed in the characterization of infectious individuals, for instance, the English term 'superseeders' translated into *szuperterjesztő*.

Lexemes related to immunity (*immunitás*) can be found in several compound words and phrases such as *immunválasz* 'immune response', *immunaktiválódási folyamat* 'immune activation process', *immunizálás* 'immunization',

immunizálódott 'immunized', *természetes immunitás* 'natural immunity', *nyájimmunitás* 'herd immunity'. Most of these forms narrow the meaning, thereby bringing a more precise term into the everyday language. The examples above also show the expansion of the vocabulary through derivation and composition. Terms belonging to the domain of digilect can also be observed, mainly in the comments on the Facebook pages, such as *fotel immunológus* 'armchair immunologist', and due to the uncertainty related to the meaning of some terms, accumulation of words and redundancy can be encountered: *immunvédettség* 'immune protection'.

The Hungarian lexemes *oltás* and *vakcina* 'vaccination' are synonyms and have been an important part of epidemic communication from the beginning. New lexemes and neologisms have appeared, which are frequently the results of calque translations, mainly of English terms: 'vaccine sceptics' = *oltásszkeptikus, vakcinaszkeptikus*, 'vaccine tourism' = *oltásturizmus/vakkcinaturizmus*, 'vaccination committee' = *oltásbizottság/vakcinabizottság*, 'vaccination precaution' = *oltásóvatosság/vakcinaóvatosság*, 'vaccination critic' = *oltáskritikus/vakcinakritikus*, 'vaccination campaign' = *oltáskampány*, 'vaccination centre' = *oltásközpont/vakcinaközpont*. These relate to different areas of epidemic communication: organization or logistics (procurement, transport, shortage, centre, quantity, tourism), research, production (development, technology), information flow (campaign, news), attitude (for or against). In connection with vaccination, it is worth mentioning the evolution of the verb *olt* 'vaccinate'. While in Hungary the normative language version accepted the verb *oltakozik* 'get vaccinated', the Transylvanian language version primarily prefers the *oltat/beoltat* 'get vaccinated' versions, and there is also the lexeme *oltogató* 'vaccinating', which refers to the person who vaccinates those who have previously registered for vaccination (*oltásra regisztráltak*). Other word combinations containing the lexemes *oltás* and *vakcina* have become common in everyday language usage: *oltási platform* 'vaccination platform' (where you can register for vaccination in Romania), *emlékeztető oltás/vakcina* 'booster vaccination', *oltási folyamat* 'vaccination process', *oltási helyek* 'vaccination sites', *oltási időpontok* 'vaccination dates', *oltottsági szint* 'vaccination level', *hagyományos vakcina/oltás* 'conventional vaccine', *új generációs vakcinák/oltások* 'new generation vaccines', *oltásra/vakcinára jogosult* 'eligible for vaccine'. Some terms can be found both in the form of phrases and compound words such as *oltási kampány – oltáskampány* 'vaccination campaign', *oltási terv – oltásterv* 'vaccination plan', *oltási stratégia – oltásstratégia* 'vaccination strategy', *oltási napló – oltásnapló* 'vaccination diary'.

Testing is also a central issue during a pandemic, so its concept has expanded, and a number of words derived from the lexeme *tesztelés* have enriched the everyday language: *antigén teszt* 'antigen test', *molekuláris teszt* 'molecular

test', *tesztalany* 'test subject', *PCR teszt (pozitív/negatív)* 'PCR test' (positive, negative)', *teszteredmény* 'test result', *rapid-/gyorsteszt* 'rapid test', *újratesztelés* 'retest', *koronavírus teszt* 'coronavirus test', *covid teszt* 'covid test', *diagnosztikai teszt* 'diagnostic test'.

The meaning of the word *vírus* 'virus', a central element of a pandemic, has also changed due to its many derived and compound forms, and, although it is a collective term, it has become equivalent to the word *koronavírus* 'coronavirus'. The appearance of specialized terms in the common language was mainly related to the process of testing: *vírusszám* 'virus number', *vírus koncentráció* 'virus concentration', *vírustartalom* 'virus content'. However, recent research has led to new concepts, so the meaning of the virus has expanded, and we already know about *mutáns vírusok* 'mutant viruses', *brit/dél-afrikai/brazil vírusvariánsok* 'British / South African / Brazilian virus variants'. They also have scientific names, in the form of acronyms, but in everyday language simpler and easier-to-remember versions are preferred. There are other word combinations related to the word *vírus* 'virus': *vírusellenzők* 'virus deniers', *vírushívők* 'virus believers', *vírusterror* 'viral terror', and, using the power of humour, such forms and synonyms have been created as: *mindmeghalunk vírus* 'we all die virus', about which *önképzett vírusszakértők* 'self-trained virus experts' or *fotelvirológus*ok 'armchair virologists' (classified as a digilect) can write on social media.

As in Romanian and English, the word *kontakt* 'contact' loses its neutrality and expands its meaning through the processes of word formation and word composition: what has so far largely referred to relationships, now refers to the possible contacts with infected people: *közösségi/utcai kontaktok* 'community/street contacts', *kontaktuskutatás* 'contact research', *kontaktvizsgálat* 'contact testing'.

The meaning of the *karantén* 'quarantine' lexeme has also expanded. *Karantén* 'quarantine' (or *vesztegzár* 'lockdown' / *járványügyi elkülönítő* 'epidemiological isolation' / *elszigetelés* 'isolation') was used to prevent the spread of an infectious disease, which, although present in everyday language, has been supplemented in the current situation by a number of new conceptual features: *intézményes karantén* 'institutional quarantine', *hatósági karantén* 'official quarantine', *házi karantén* 'home quarantine'. These terms were also explained on the official page of the Democratic Alliance of Hungarians in Romania, indicating that the meaning of these new elements may not have been clear for everybody. The conceptual circle of quarantine also included elements such as *karanténkötelezett (személy)* 'quarantined (person)' or a whole range of digilects collected by Veszelszki: *karantének* 'quarantines', *karantini* 'quarantiny', *karanténbébi* 'quarantine baby', etc., which provided some help to cope with the difficulty of the situation with the stress-relieving effect of humour. However, it is probable that these fashion words will be forgotten relatively soon, as they will no longer be needed. The concept of quarantine also includes certain loan elements, internationalisms,

such as the term *lezárás* 'lockdown', for which no proper Hungarian translation has been found, or the lexeme *izoláció/izolálódás* 'isolation', which has so far been primarily used to describe psychological situations in human relations. Quarantine also resulted in the emergence of other expressions: *tavaszi otthonülés* 'spring home sitting', *fizikai/társadalmi távolságtartás* 'physical/social distancing', and variations of their use indicated the uncertainties related to them. The Hungarian word *társadalmi távolságtartás* was created as a calque translation of the English term 'social distancing', but it soon became clear that it did not cover the given concept, and therefore *fizikai távolságtartás* 'physical distancing' has been used in official forums.

We have identified a number of linguistic elements that have already been present in the common language but have undergone a narrowing of meaning due to the epidemic: regarding the word *maszk* 'mask' and expressions related to its wearing, we can talk about narrowing of meaning because during the epidemic it mainly applied to the medical mask or equivalent masks. We can observe linguistic creativity in some of the words derived from it (*maszkozás* 'masking', *maszkellenes* 'anti-masker', *maszkviselés* 'mask wearing').

Words and phrases grouped around the term *korona* 'corona/crown' have become narrower as a result of the pandemic, and the word combinations have specific meanings: *koronavírus* 'coronavirus', *koronavírus-diagnosztika* 'coronavirus diagnostics', *koronavírus-szekvencia* 'coronavirus sequence'. Expressions belonging to the category of digilects add more colour to the category: *koronamizéria* 'corona misery', *koronacirkusz* 'corona circus', *koronaposzt* 'corona post'.

It is a common linguistic phenomenon that new words have also appeared in the Hungarian language – transfer phenomena can be observed in forms that we took over from the English language due to the pandemic. Typically, the English terms were accompanied by their translation; in many cases, the translation and explanation were given in brackets in the press or social media: *flattening the curve* (laposítsd a görbét), *lockdown* (lezárás). As mentioned before, calques are also characteristic such as: *koronaszkeptikus* 'coronasceptic', *nyájimmunitás* 'flock immunity', *antigén* 'antigen', *antitest* 'antibody', *veszélyeztetett csoport* 'vulnerable group', *oltási rizikó* 'vaccination risk'.

At the same time, the acronyms deserve special attention, especially the evolution of the word COVID, which is the only true neologism in the vocabulary of this pandemic. It is mainly characterized by spelling uncertainty (*Covid/covid/kovid*). The neologism *covid* was easily integrated into the Hungarian everyday language, both in derived and compound forms, and new expressions were soon formed: *enyhe covid* 'mild covid', *covid pozitív* 'covid positive', *covid mutációk* 'covid mutations', *ex-covid-os* 'someone who already had covid', *covid oltáskönyv* 'covid vaccine book'. At the same time, the changing forms in English

also indicate the process of changes in Hungarian: for example, from 'long-covid' and 'long hauler' the translation of the first expression appears in Hungarian as *hosszú-covid*.

Although we have not analysed the spelling aspects of the pandemic vocabulary, it is clear that we encounter very careless, frequent spelling inconsistencies and ignorance on social media sites. However, this is not surprising because the priority of the language used in comments and social media sites is to be clear and correct enough for comprehension. The positive aspect is the enrichment and dynamic change of the language as a result of the epidemic.

3.2. Analysis of the Romanian corpus

Regarding the Romanian-language corpus, there is a wide range of word formation possibilities, the most common techniques of word formation being the transfer of specialized terms into the everyday language, abbreviations and derivation, but loan words, transfer phenomena, calque translations, and contact phenomena are also worth mentioning.

The most outstanding phenomena include the processes of terminologization/ specialization and de-terminologization/generalization. In this period, by far the most widely used neologism is *carantină* 'quarantine'. According to the explanatory dictionary of the Romanian language, it is derived either from the Russian language or from the French word *quarantaine* or the Italian word *quarantina*, and it basically defines the period of isolation.[1] However, according to *Merriam Webster*, the French or Italian etymology is more likely.[2] The other most common neologism is *coronavirus* 'coronavirus', of English origin. *COVID* (in connection with which some languages using multi-gender forms of nouns seem hesitant, e.g. *le* or *la covid* in French) has not even been included in the explanatory dictionary of the Romanian language.[3]

The process of de-terminologization, or generalization, has had a significant effect on the language. During the coronavirus epidemic, a number of specialized terms from medical jargon started to be used in official publications and the press, more than those already used during previous epidemics, such as *autoizolare* 'voluntary isolation', *asimptomatic* 'asymptomatic', *pacientul zero* 'patient zero', *igienizare* 'hygienization', *cazuri de infecție locală* 'local infection cases', *cazuri de import* 'imported cases', *focar* 'outbreak site', *triaj* 'triage', *caz suspect* 'suspect case', *caz confirmat* 'confirmed case' – and they have become widespread.

De-terminologized lexemes caused by the coronavirus epidemic include *super răspânditor* 'superseeder', *virusul SARS CoV-2* 'SARS-CoV-2 virus', *test*

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1   https://dexonline.ro/definitie/carantina.
2   https://www.merriam-webster.com/dictionary/quarantine.
3   https://dexonline.ro/definitie/COVID.

COVID-19 'COVID-19 test', *test PCR* 'PCR test', *masca FFP1* 'FFP1 mask', *masca FFP2* 'FFP2 mask', *centre de vaccinare drive-through* 'drive-through vaccination centres', *doza de rapel* 'booster vaccination', *coronavirus* 'coronavirus', *noul coronavirus* 'the new coronavirus'.

From the lexemes that have already been present in everyday language and have become more frequently used, the following can be considered the most important: *probă* 'sample', *test* 'test', *purtător* 'virus carrier', *virus* 'virus', *asimptomatic* 'asymptomatic', *comorbiditate* 'comorbidity', *rinoree* 'runny nose', *simptom* 'symptom' *simptomatic* 'symptomatic', *asimptomatic* 'asymptomatic', *incubație* 'incubation', *cefalee* 'headache', *congestie* 'nasal congestion', *mialgie* 'muscle pain', *dispnee* 'dyspnoea', *terapie intensivă* 'intensive care unit' or 'intensive care'.

The word for vaccine in Romanian is *vaccin* (plural *vaccinuri*), which is the basis of many derivatives:

– with suffixes: *antivaccinare* 'anti-vaccination', *Rovaccinare* – the abbreviated name of the organizational platform that handles the vaccination;

– by the creation of abbreviations and acronyms: *Registrul Electronic Național de Vaccinare (RENV)* 'National Electronic Vaccination Register';

– as a basis for phrases and compound words: *vaccinosceptic* 'vaccine-sceptical', *contacții vaccinați* 'vaccinated contacts', *persoane nevaccinate* 'non-vaccinated people', *campania de vaccinare împotriva COVID-19* 'vaccination campaign against COVID-19' *strategia pentru vaccinarea împotriva COVID-19 în România* 'vaccination strategy against COVID-19 in Romania', *centre de vaccinare fixe şi mobile* 'fixed and mobile vaccination centres', *eligibil pentru vaccinare* 'eligible for vaccination', *doze de vaccinare* 'vaccination doses', *planul european pentru monitorizarea siguranței vaccinurilor împotriva COVID-19* 'the European plan for the safety monitoring of COVID-19 vaccines', *isteria vaccinării* 'vaccine hysteria';

– with contraction: instead of *doza de vaccin 1* 'first dose of vaccine' / *doza de vaccin 2* 'second dose of vaccine'; only *doza 1 / doza 2* 'first dose/second dose'; instead of *doza de rapel* 'booster dose', only *rapel* 'booster'; instead of *etapa de vaccinare I, II, III* 'stage I, II, III of vaccination', only *etapa I, II, III* 'stage I, II, III' are used.

Thematically, the lexemes that have already been present in everyday language, and have become more frequently used, belong to the following categories:

– related to immunity (*imunitate* 'immunity', *imunizare* 'immunization', *imunogenitate* 'immunogenicity', *imunitate în masă* 'herd immunity', *răspuns imun* 'immune response', *infecție naturală* 'natural infection');

– related to mask wearing (*mască* 'mask', *mască medicală / chirurgicală* 'medical' / 'surgical mask', *sfaturi de purtare a măştii* 'mask wearing tips');

– language units belonging to the semantic system of infection: *dezinfectant* 'disinfectant', *dezinfectare/igienizare* 'disinfection/hygienization', *răspândire*

'spread', *răspândire comunitară* 'community spread', *transmisibil* 'contagious', *contaminare* 'infection', *triaj* 'triage', *letalitate* 'lethality', *mortalitate* 'mortality', *incidență* 'incidence', *prevalență* 'prevalence', *pozitivat* 'positive case', *transmisibilitate* 'transmissibility', *conduită sanitară* 'health behaviour', *stare de urgență* 'state of emergency';

– terms indicating the occurrence of cases: *caz suspect* 'suspicious case', *caz confirmat* 'confirmed case', *focar* 'focal point', *cazuri de infecție locală* 'local infection cases', *cazuri de import* 'imported cases', *primul caz* 'first case', *cazul zero* 'case zero', *pacient zero* 'patient zero';

– general terms for treatment or prevention: *medicație* 'drug treatment', *automedicație* 'self-medication', *termometrizare* 'thermometry', *termoscanare* 'thermal scanning'.

Some of the terms which have remained within the framework of the specialized domains and have not been transferred into the everyday language appear in government publications, but more rarely in the press, such as *ARN-mesager* 'messenger RNA', *seroprevalență* 'seroprevalence', *pacient paucisimptomatic* 'paucisymptomatic patient', *farmacovigilență* 'pharmacovigilance', *zoonotic* 'zoonotic', and, of course, they also include internationally accepted abbreviations used in medical discourse (*ESI / Emergency Severity Index*, in Romanian *Indicele de severitate de urgență*; *BP / blood pressure*, in Romanian *tensiune arterial*, or *TA*; *O2 Sat / oxygen saturation*, in Romanian *nivelul de saturație a oxigenului în sânge*; *PEFR / Peak Expiratory Flow Rate*, in Romanian *debit expirator de vârf*, or *DEV*).

Another feature of the Romanian corpus is the process of semantic specialization; in many instances, we could identify morphological changes and conversion phenomena in the case of words and expressions already existing in the language, which developed new, specialized shades of meaning. The constantly changing reality determines the frequency and the combination or derivation possibilities of certain words. For example, the verb *a carantina* 'to quarantine' generated from the noun *carantina* 'quarantine' has become widely used. The verb *a se carantina* was previously missing from general dictionaries but is now used both in everyday language and jargon: e.g. *pacienții sunt carantinați*, or *pacienții se carantinează* 'the patients are quarantined'. As a result of the epidemic, a masculine version of the originally neutral noun *contact* 'contact' also appeared: *un contact / doi contacți* instead of *un contact / două contacte*, meaning 'contact person' in both cases).

Language units that fall into the semantic domain of testing also show unusual derivation or conversion processes. Thus, such unusual forms as *pozitivare* 'positivity', *pozitivări* 'positivities', *pozitivitatea testului* 'test positivity', or synonymous series appeared: *Testul COVID-19* 'COVID-19 test', *test PCR* 'PCR test', *test Real-Time PCR (RT-PCR)* 'Real-Time PCR (RT-PCR) test', *Testul RT-PCR SARS-CoV-2* 'RT-PCR SARS-CoV-2 test' – all denoting the PCR test or

partial synonyms such as *test diagnostic* 'diagnostic test', *test anticorp Covid 19* 'COVID-19 antibody test', *test rapid* 'rapid test', *test rapid immunocromatografic* 'rapid immunochromatographic test', *test serologic* 'serological test', or *test serologic de identificare a anticorpilor anti SARS-CoV-2 IgG şi IgM* 'SARS-CoV-2 IgG and IgM antibody serological test', and *RT PCR multiplex* 'multiplex Real-Time PCR test', including shortening of lexemes and acronyms, and the synonymous *test ARN viral SARS-CoV-2 şi Influenza A/B* 'Combined Influenza and COVID-19 PCR test' forms.

We have found lexemes that are not the result of translation or derivation but rather represent cases of coinage from the Romanian phonetic and morphological inventory. In the specialized language of emergency medicine, a noun has appeared that is entirely a specific linguistic creation, the noun *isoletă*, which denotes a special stretcher used to transport patients. The lexeme *isoletă* comes from the verb *a izola* 'isolate' and the suffix *-etă*, probably added the same way as in the case of other means of transport *motocicletă* 'motorcycle', *bicicletă* 'bicycle', or *trotinetă* 'scooter'. Interestingly, unusual linguistic creations also appeared in Romanian, such as the form *virusologie* 'virusology', which, however, could not displace the previous form *virologie* 'virology'. Another linguistic oddity of the moment is the term *criza de coronavirus*, which literally means 'coronavirus crisis'. Normally, in Romanian, the word *criză* 'crisis' means the absence of something, it means a deficiency (e.g. *criză de medicamente* 'lack of medicine'). In this case, paradoxically, in semantic terms, *criză de coronavirus* refers to a critical situation caused by the coronavirus, although in a strict sense it would mean its absence.

COVID-19 is a new word created by an abbreviation and comes from the English language (Coronavirus Disease), denoting a disease caused by a virus that appeared in 2019. In Romanian, *SARS-CoV-2* is synonymous with *COVID-19*, although COVID-19 stands for the disease, while *SARS-CoV-2* is the officially accepted name for the disease-causing virus (SARS stands for Severe Acute Respiratory Syndrome, while CoV is derived from coronavirus, and 2 indicates that we are talking about a second version of the virus).

A phenomenon of broadening of meaning has also emerged, such as in the phrase *pandemie globală* 'global pandemic'. It is well known that the meaning of the noun *pandemic* in itself means a global epidemic. It is also incorrect to use *un pacient a contractat virusul* 'a patient has contracted the virus' instead of *un pacient a contactat virusul* 'a patient has contacted the virus': here the interchange of the verbs *contacta* 'contact' and *contracta* 'contract' causes confusion. Contradictory wordings are also emerging, such as *o creştere spectaculoasă a numărului deceselor* 'a spectacular increase in the number of deaths', which associates the adjective with a positive meaning *spectacular* 'spectacular' with an increase in mortality.

If in Hungarian derivation and formation of compound words are the two most common word formation methods (cf. Keszler 2000, Lengyel 2000, Ladányi 2007), in Romanian borrowings and the calque translation of English words is also frequently encountered in our corpus: for example, *aplatizarea curbei* 'flattening of curve', *Coronapocalypse* or *apocalipsa corona* 'Corona apocalypse', *Rona/ (ko)rona*, *downshifting* (slowing down the spread of the disease), *quarantini* (alcoholic drink mixed during the quarantine), or *lockdown*, which has also been transferred to the Romanian vocabulary without any change.

Some language units have been translated into Romanian from English or French through word-for-word translation. The following examples have become widespread in everyday language: *primele cazuri* 'first cases', *coronasceptic* 'coronasceptic', *cordon sanitar* 'cordon sanitaire', *imunitate de turmă* 'herd immunity', *condiții medicale preexistente* 'pre-existing medical conditions', *coridor umanitar* 'humanitarian corridor', *Program de achiziții de urgență pandemică* 'Pandemic Emergency Purchase Program (PEPP)'. We can also find such translations among digilects, e.g. *bombardier de viruşi* 'virus bomb'.

A significant number of acronyms can be found in the Romanian corpus. The words *carantină* and *coronavirus* are common bases for compound words and word-merging neologisms: *COVID-19, pneumonie atipică severă 2019-nCoV* 'Severe atypical pneumonia 2019-nCoV', *focarul COVID-19* 'COVID-19 outbreak', *sindromul respirator din Orientul Mijlociu (MERS)* 'Middle Eastern Respiratory Syndrome (MERS)', *Sindromul Acut Respirator Sever (SARS)* 'Severe Acute Respiratory Syndrome (SARS)', *covidiot* 'covidiot', *ARN viral SARS-CoV-2* 'SARS-CoV-2 viral RNA', *covizi* 'covid patients', *anticovid* 'anti-covid', *noncovid* 'non-covid', *#staiacasă* '#stayathome', *glovoist/glovoistă* 'courier delivering food', *INSP (Institutul Național de Sănătate Publică)* 'National Institute of Public Health', *Anestezie şi Terapie Intensivă (ATI)* 'Intensive Care Unit', *Direcția de Sănătate Publică DSP* 'Public Health Department', *Organizația Mondială a Sănătății (OMS)* 'World Health Organization (WHO)'.

With regard to the Romanian corpus, it can be stated that most word formation processes were related to the terms *covid, coronavirus, quarantine*, and *vaccine* – most of the new units were formed with these words. It is likely that these linguistic units are the most important and most common at the level of public discourse at the time of the epidemic, so by slightly nuancing the principle of the law of synonymic attraction, we can state that these lexemes have proven to be most important to the linguistic community. Therefore, most synonyms and most derivatives were generated by these (at the beginning of the epidemic, the concepts of *coronavirus* and *quarantine* had a leading role in the public discourse, while at the present phase of the epidemic the concept of vaccination has come to the fore).

The linguistic units that are considered lexical innovations due to the new social and health situation generated by the epidemic are roughly the same in Hungarian and Romanian, and most of them are borrowed from English (COVID-19, Remdesivir), or they are word-for-word translations (*novel coronavirus / új koronavírus / noul coronavirus, physical distancing / fizikai távolságtartás / distanțare fizică, contact tracing / kontaktkutatás / depistarea contacților, comorbidity/társbetegség/comorbiditate, cytokine storm / citokin vihar / furtună de citokine*). However, there is also a significant proportion of already existing words that have gone through meaning changes (*asymptomatic/tünetmentes/ asimptomatic, social distance / társadalmi távolságtartás / distanțare socială, frontline / frontvonal / prima linie, community spread / közösségi terjedés / răspândire comunitară, isolate/elkülöníteni/izola, coronavirus/koronavírus/ coronavirus, crisis/válság/criză*).

Hungarian–Romanian language interactions and contact phenomena have already been studied (see Benő 2004, Benő–Péntek 2003, Péntek 2007, Benő– Péntek 2020). We do not intend to carry out a comprehensive study; nevertheless, we must note that the number of loan words has increased in the 20th century. This applies to lexical borrowings and to phrases and terms translated from Romanian. The interesting thing about a pandemic is that these vocabulary changes can be observed in real time. It can be seen that there is minimal impact of Romanian on the Transylvanian Hungarian language version. The epidemic has led to the birth of various acronyms (e.g. names of institutions). These are generally not translated in press and everyday communication, such as DSP (*Direcția de Sănătate Publică* 'Public Health Department').

There are minimal differences between the Hungarian normative language version and the Transylvanian language version in terms of pandemic vocabulary. As already mentioned, the effects of the Romanian language can be detected in the first part of the compound word referring to the PCR test: the Romanian term uses the English word *real-time*, while in the Hungarian texts we find the abbreviation *RT*. In the Transylvanian language version, however, the longer version occurs more often: *real-time PCR test*. The acronym *SARS-CoV-2* for the coronavirus is also noteworthy, which is not used in the Hungarian language versions (perhaps due to the sound symbolism behind the utterance of such an acoustic unit in Hungarian), but it is often used in the Romanian language.

As a gap-filling lexeme or semantic void, we can mention the word *izoleta*, which refers to the special, closed stretcher and is widespread in the Transylvanian language version, in oral communication and on online social media sites. In the official forums, *elkülönítő* 'isolation unit' is used, which, however, does not carry the meaning of the term (closed, capsule-like, patient-carrying stretcher). The Hungarian normative language version tried to introduce the term *izolációs kapszula* 'isolation capsule', a word-for-word translation of the English term.

However, we can see a significant difference in the field of digilects. The creative language inventions brought to life by the pandemic were collected by Veszelszki (2020) in a dictionary. These appeared, and some of them spread, mainly on social media pages, posts, and memes. However, in everyday communication, speakers soon seem to distinguish the new linguistic elements whose use is indeed important, gap-filling, informative, and they tend to neglect and forget the less relevant ones. There is even less interest in these *hapax legomenon*-like expressions, or nonce words, in the Transylvanian language version.

4. Conclusions

It can be noticed that the creation of terms and lexicalization processes are not only available in the domain of specialized languages: a new disease and its cures naturally lead to the emergence of new concepts and names. Ordinary people have had to interpret the new vocabulary of a whole new reality overnight: this includes not only a plethora of medical terms but also terms used in sociology and psychology such as *social distance*, *prevention*, *isolation*, *observation*, or *monitoring*, which have become part of our everyday life. In addition to the newly created terms, new meanings, extended meanings, changes in meaning, or new lexemes with prefixes and suffixes nuance the processes of lexicalization, revealing an impressive linguistic mobility at the level of public discourse. During the communication generated by the epidemic, an extremely wide and heterogeneous audience found itself in a position to incorporate into their vocabulary new, often unknown concepts, lexemes, and linguistic creations whose meanings were either unknown or slightly different. In the COVID jargon used in everyday language, we can find nicknames, slang terms, abbreviations, and puns. Although we were unable to measure the degree of understanding and interpretation, we noticed how (apparently) speakers incorporated these units with great ease into their use of language. This is evidenced by our research on various forums and social media platforms. The only question is what will remain in the active vocabulary of everyday or professional language use after the epidemic and what will prove to be an occasional language creation, a *nonce* word.

Everyday speech is the type of communication that is most closely related to the dynamics of daily life and the events or experiences in which the speakers are involved. The specificity of these events and experiences is less reflected in certain components of discourse, such as morphology, syntax, or textual organization devices, but it can easily be located in vocabulary, as the lexicon is the most versatile area in the structure of a natural language. Perhaps this is the reason why the coronavirus pandemic managed to populate lexicons with interesting words and phrases, which are a resourceful domain to be approached and analysed by linguists.

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Hungarian Dialectology. Research of Hungarian Dialects in Romania

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Abstract. After the Treaty of Trianon, the long history of research on the Hungarian dialects in the neighbouring countries did not cease. A previous article on the history of research on Hungarian dialect islands reviewed the significant achievements of Hungarian dialect research up to 1920 (Both 2020b). In the present article, we summarize the essential periods and results of Hungarian dialect research in Romania from 1920 to the present day. The article will show how in the last one hundred years a Hungarian-language department in a minority environment has redirected its research, resulting in a decreasing share of dialectological research, and how, despite these developments, the Hungarian dialectological community in Romania has enriched the Hungarian dialectology research with significant results.

Keywords: Hungarian dialectology, research history, Transylvanian dialectology

1. Introduction

In my previous paper, *From the Beginnings until the Division of Hungary (1920)*, published in 2020, I presented the main aspects of the Hungarian dialect research between 1645 and 1920. The first period of dialect research (between 1645 and 1872) resulted in the early observations of popular language appeared in some of the essential linguistic works on the Hungarian language. The *Age of the Language Reform (1818–1872)* then gave rise to an intellectual environment in which interest in the language of the people became increasingly vital, and at the same time more and more professional works on dialectology were published.

The birth of the *Magyar Nyelvőr* [Hungarian Language Guardian] periodical provided a significant professional forum for the scientific writing of these works and gradually paved the way for dialectology to become an independent field of research in Hungarian linguistics. A little more than thirty years later, however,

Hungarian dialectological research in general witnessed a decline that lasted for a considerably long time, with fewer and fewer scientifically unimpeachable works published, perhaps the main reason being the lack of a committed new generation.

Between 1914 and 1918, the First World War took place, the consequences of which tore Hungarian scientific life apart until the 1990s. On 4 June 1920, the Trianon Peace Treaty divided former Hungary, a country that had been politically and administratively undivided, and fragmented its nation. Since then, we speak of Hungarians living in Hungary and Hungarians living in Romania, Slovakia, Austria, etc. and of Hungarian linguistics in these countries.

With these developments, Hungarian dialect research has not ceased to exist since, as we shall see, it underwent a revival in the first years of the 20th century.

2. The era of rearrangement (1920–1936)

Although dialectological research declined rapidly in the period between the two World Wars, we must nevertheless highlight two works of the time that were a synthesis of everything that had happened in this field of science up to then. One of them is Antal Horger's work, and the other was written by Gyula Laziczius, both entitled *A magyar nyelvjárások* [The Dialects of Hungarian].

The dominant view of Horger's typology (1934) is linguistic history, but it also applies the geolinguistic aspect. In Laziczius's work (1936), the author, completing his studies at the Prague school, applied the phonological aspect in studying dialectal sound systems and the classification of dialects (Márton 1973: 178). A fundamental principle defined his approach: two local dialects not having the same phoneme system cannot belong to the same type of dialect.[1]

According to Samu Imre, Laziczius's great merit was, among other things, his intention to place the phonetic classification of dialects on a modern and realistic basis, thus paving the way for a new era (Imre 1978: 149).

2.1. The Csűry school

During the period between the two world wars, Bálint Csűry had a notable role as the founder of folk language research in Debrecen, as representatives of Hungarian dialectology generally consider. Moreover, it was he who started research on Hungarian dialects in Kolozsvár, as before going to Debrecen he had been a teacher at the Reformed College of Kolozsvár.[2] The university did

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1   „Nem tartozhat egyazon nyelvjárástípusba két olyan helyi nyelvjárás, amelynek fonémarendszere nem azonos" (Imre 1978: 149).
2   Kolozsvári Református Kollégium.

not have a department of Hungarian linguistics at that time. We know from the publications of Attila Szabó T. that study groups of Hungarian students were formed in Kolozsvár when he started his university studies at the initiative of Dr Lajos György, the director of studies at that time.

Bálint Csűry led the linguistic community; between 1929 and 1930, he delivered lectures on Hungarian phonetics and sound history (Szabó T. 1941: 305). There had been preceding events to this, as Csűry started collecting the Szamoshát dialect at the beginning of the century, first for his own personal interest and then, after 1908, on behalf of the *Magyar Nyelvtudományi Társaság* [Society of Hungarian Linguistics] (Márton 1973: 179). Moreover, the result of his data collection, the *Szamosháti Szótár* [Dictionary of the Szamoshát Dialect], had already been tagged and placed in boxes, waiting for processing.

He had not yet finished processing the collections of the dialect of his native region when he headed off to the settlements around Bákó,[3] populated by Moldavian Hungarians, with the purpose of studying the southern Csángó dialect. This would complete the dictionary of the Northern Csángó dialect, the material of which was collected by Yrjö Wichmann in 1906 and published in Helsinki in 1936, thanks to Bálint Csűry and Artúr Kannisto's work. In the autumn of 1944, Csűry's collection of the southern Csángó dialect was destroyed in the war. Bálint Csűry moved to Debrecen at the beginning of the 1930s, and in the study group mentioned before he encountered Attila Szabó T., who then, in a manner worthy of Csűry, carried on the dialect research in Kolozsvár. According to Samu Imre, Csűry played a vital role in the revival of Hungarian dialectology by making Debrecen the centre of Hungarian dialect research for a long time. It was Csűry who founded *Népnyelvkutató Intézet* [Institute of Folk Language Research], launching the first genuine journal of Hungarian dialectology, entitled *Magyar Népnyelv* [Hungarian Folk Language], which later changed its name to *Magyar Nyelvjárások* [Hungarian Dialects] and has been published under this new name till our days. Following the example of the Finns, he urged that dialect research should be brought back to the level of European standards of the period.

At the same time, Imre was critical of Csűry's unrealistic interest in the research of Hungarian territories crossing the borders (Imre 1971: 10–12). As Samu Imre writes: Thanks to Csűry, at the end of the 1930s, dialect research was revived, and collections became more diverse and systematic than before.[4] We also owe it to Csűry for having developed the first, relatively unified sound marking system, which was a significant advance at the time and, in fact, led to the further development of the system (Imre 1971: 13–14).

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3   Rom. Bacău.

4   „Csűrynek köszönhető, hogy az 1930-as évek végén a nyelvjáráskutató munka újból fellendült, hogy az anyaggyűjtés az addigiaknál sokrétűbbé, tervszerűbbé vált" (Imre 1971: 13).

3. The Kolozsvár school

3.1. Folk language research under the leadership of Attila Szabó T. (1936–1944)

Attila Szabó T's interest in folk language began when in 1930 Csűry took him on his second trip to visit Csángó settlements, more precisely Bogdánfalva and its surroundings. Unfortunately, Csűry's first attempt to establish Transylvanian folk language research failed. In the spring of 1936, Szabó T. changed his workplace to the archives of *Erdélyi Múzeum* [Transylvanian Museum Society], and, at Lajos György's encouragement, he started to look for adepts of folk language research. As Szabó T. recalled later, two students, Mózes Gálffy and Gyula Márton became serious researchers of folk language (Szabó T. 1941: 306–307).

Thus, Szabó T. continued delivering the lectures on phonetics started by Csűry in Kolozsvár, focusing mainly on recording dialectal data. When Szabó T. obtained Csűry's glossary, which comprised the fundamental material of his dialect atlases, the questionnaire came to the fore as a data collection method. In the summer of 1937, Szabó T. and his students started collecting folk language data. József Árvay dealt with the geographical names of Hétfalva in Barcaság, Mózes Gálffy studied the dialect of Szind, and Gyula Márton was engaged in dealing with the dialect of Nagymon in Szilágyság and that of Ördöngösfüzes in Mezőség (Márton 1973: 181). So, the gathering of data had started, and *Erdélyi Múzeum* supported research by providing rewards and publishing opportunities. Setting up the first Transylvanian workshop and village research in Kalotaszeg, Bábony (Szabó T. 1937: 50–65), was regarded as an outstanding event of the research of folk language in Kolozsvár.

When speaking about the epoch, Gyula Márton emphasizes the importance of the Romanian dialect research of that time, the centre of which was *Muzeul limbii române* [Museum of Romanian Language] in Kolozsvár. First and foremost, it was he who established this connection since he had studied Hungarian, Romanian, and aesthetics at the university. He learned a great deal from the eminent Romanian linguists of that time, such as Sever Pop, Romulus Todoran, Emil Petrovici, Sextil Puşcariu, and Teodor Capidan. They helped him gain insight into the work methods used during the preparation of the Romanian language atlas, its interpretation and use, and through Capidan's classes he came into contact with the ideas propagated by the French school of sociology, that is, the relationship between language and society. Later on, these imprints were reflected in the work of the department. On the other hand, with Jenő Nagy's help, who studied in Germany after Debrecen and wrote his PhD thesis on the dialect of Kalotaszeg and moved to Kolozsvár, they learned about the history and methods of German dialect research (Márton 1973: 181–183).

At the beginning of the 1940s, systematic Hungarian dialect research began in Romania with the participation of *Erdélyi Tudományos Intézet* [Institute of Transylvanian Science] and the Department of Hungarian Linguistics at the University of Kolozsvár. The works were directed by Attila Szabó T. As Gyula Márton mentioned, this type of research developed in two areas: one of them was related to collecting place names and the other one to dialect research, which developed in two directions. In the summer of 1941, the department began studying the Borsavölgy dialect with Szabó T., Iván Balassa, Mózes Gálffy, Samu Imre, and several students from the Hungarian specialization. The other direction was editing a regional atlas of Kolozsvár and its surroundings, initiated by Mózes Gálffy and Gyula Márton. Data collection started, but World War II broke out, and the plan could not be carried out. Only a sample was published in *Huszonöt lap „Kolozsvár és vidéke népnyelvi térképéből"* [Twenty-Five Maps from the Atlas of Kolozsvár and its Outskirts] (see Szabó T.–Gálffy–Márton 1944). At this time, researchers from Kolozsvár had good results in researching the dialects of Szamoshát, Borsavölgy, Kalotaszeg, and Moldavia, but little progress was made in the research of the other Hungarian dialects in Romania. At the same time, the period was essential for the development of the methodological basis of the Hungarian geolinguistic research in Romania and the collection of the first dialect atlas.

The period between 1947 and 1952 was a time of sheer confusion. Gyula Márton was enrolled as a soldier in October 1944 and then captured in Izhevsk (Russia). Three years later, in 1947, he returned home (Péntek 2016a: 11). Márton was planning to return to Zilah as a high school teacher in 1947, but he eventually accepted the teaching position offered by the Reformed College in Kolozsvár on 1 October. Meanwhile, Attila Szabó T. invited him to the Hungarian Department of the University in the autumn of 1948, and after the education reform in the same year, he was appointed in December. According to his writings, his relationship with Szabó T. and Mózes Gálffy was not without hardships because of their rigid character; besides, he did not really have the time to carry out scientific research due to the numerous new subjects he was teaching. Finally, in the spring of 1950, he began to work on the research project named *Borsavölgye igeragozása* [Verb Conjugation of Borsavölgy]. At the beginning of the summer in 1949, the university's management was able to provide the department with a financial basis; thus, Szabó T. decided to start mapping the Moldavian Csángó dialects (Márton 2016: 24–29).

In 1949, dialect research began to operate in a somewhat systematic way, and the *Institute of Linguistics of the Romanian Academy* in Kolozsvár was established, to which two Hungarian dialect researchers, Ferenc Gazda and Jenő Nagy, were appointed. Slowly, time was getting ripe for carrying out the richest and most reliable collection of Hungarian dialects in Romania. At the same time, they were at a crossroads: they had to decide whether to collect and

process the material in a smaller area or to collect as much material as they could as it was most important, leaving it to be processed later. They decided on the latter. Two projects were launched: one was a large atlas of Hungarian dialects in Romania, and the other was a series of smaller, regional atlases of dialects. Initially, both were dealt with by the university department, but later the large atlas was transferred to the *Institute of Linguistics* at the Romanian Academy, and the department was left with the regional atlases of dialects. Their methodology was a modern one. The questionnaire of the large atlas had 3,340 questions, and the answers to them were collected at 140 survey points; the atlas of dialects included 850–1,400 questions and sought a network of survey points with absolute density. The series of regional language atlases was launched by the Moldavian Csángó dialect atlas (Márton 1973: 184–186).

3.2. The department of Gyula Márton (1952–1973)

> In the autumn of 1952, Attila Szabó T. was unexpectedly dismissed from the university. We started the new academic year without him. In the autumn of 1952, I was appointed Head of the Department, so it was my responsibility to further organize and manage the research work. Of course, I received significant help from Mózes Gálffy, but also from the whole department and even from the university's management (László Bányai). Being a dean simultaneously, I was able to properly represent the interests of the department in higher forums as well.[5]

This is how Gyula Márton remembered the way his activity as head of the department started. He held this position until 1973 when the Department of Hungarian Linguistics and Literature merged. Gyula Márton played an essential role in directing research at the department and participating in research, but he also played an active part in the development of the department. It was thanks to him that members of the following generation came to the department: Márta Vámszer, Zoltán Szabó, László Murádin, Piroska B. Gergely, Mária J. Nagy, Pál Teiszler, and Dezső Balogh and then in the 1950s Ferenc Kósa, István Vöő, János Zsemlyei, and lastly, in 1964, János Péntek (Péntek 2016a: 12).[6]

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5   *1952 őszén Szabó T. Attilát váratlanul elbocsátották az egyetemről* [Szabó T's removal from the university meant that he was transferred to the Institute of Linguistics of the Romanian Academy (Péntek 2016a: 11)]. *Az új tanévet nélküle kezdtük meg. […] 1952 őszén engem neveztek ki tanszékvezetőnek, így a tud. munka további szervezésének és irányításának feladata rám hárult. Persze jelentős segítséget kaptam Gálffy Mózestől, de a tanszék egészétől, sőt az egyetem vezetőségétől (Bányai László) is. Mivel egyben dékán is voltam, megfelelő módon tudtam képviselni a tanszék érdekeit felsőbb fórumoknál is* (Márton 2016: 31).

6   Nothing else shows more significantly the attitude of Romanian socialism towards Hungarian scientific workshops than the fact that János Péntek remained the youngest linguist of the

In his work, Gyula Márton continued the initiatives that were developed under Szabó T's leadership. Between 1949 and 1969, the staff of the department collected the material of nine language atlases: *A moldvai csángó nyelvjárás atlasza* [Atlas of the Dialect of the Moldavian Csángós], *Csík és Gyergyó atlasza* [Dialect Atlas of Csík and Gyergyó], *Háromszéki atlasz* [Dialect Atlas of Háromszék], *Udvarhelyszéki atlasz* [Dialect Atlas of Udvarhelyszék], *Aranyosszéki nyelvjárás atlasza* [Dialect Atlas of Aranyosszék], *Felső-Maros mente tájnyelvi atlasza* [Dialect Atlas of the Upper-Maros Region], *Szamosháti tájnyelvi atlasz* [Dialect Atlas of Szamoshát], and *Bánsági nyelvjárás atlasza* [Dialect Atlas of Bánság]. Of these, two volumes of *Csángó atlasz* and *Szilágysági atlasz* were published (for more details, see Cs. Nagy. 2007: 123). Publishing the material of the atlas of Székelyland had a great importance. As publication of atlases was primarily hampered by publishing houses, the editors opted for publishing the material in the form of a dictionary (similar but not identical to dialect dictionaries). The *Székely nyelvföldrajzi szótár* [Szekler Geolinguistic Dictionary] was finally published in 1987 in Budapest (see Gálffy–Márton 1987).

At the same time, Gyula Márton carried out not only geolinguistic research, but he also actively participated in other research activities such as the processing of Transylvanian dialects based on their features, collecting and analysing geographical and personal names, and processing Hungarian linguistic elements of Romanian origin (Péntek 2016a: 12).

We must pay special attention to 1957, when the launch of a Hungarian-language journal on Hungarian issues became a reality in Romania. This was the *Nyelv- és Irodalomtudományi Közlemények* [Linguistic and Literary Communications] published by the Institute of Linguistics at the Romanian Academy in Kolozsvár. Although this journal was not the only one in which Hungarian dialect researchers from Romania published their studies and smaller publications, the archives reveal the dynamics of Hungarian dialect research in Romania. Since the launch of the journal in 1957, we can see that every issue has had more dialectology-related writings, the number of which was later steadily decreasing. At the same time, an overview of the archives also gave an idea of the areas that Hungarian linguists in Kolozsvár were dealing with in dialect research.

According to *Nyelv- és Irodalomtudományi Közlemények* (NyIRK), in 1957, Attila Szabó T. published the first issue of the *A romániai magyar nyelvjárások atlasza* (see Szabó T. 1957), along with some other works on the same topic written by László Murádin, Attila Szabó T., and István Vöő. Several papers, whose authors were Gyula Márton, Mózes Gálffy, Attila Szabó T., János Zsemlyei, and in the 2000s János Péntek, were dealing with dialect-related issues concerning the Hungarians living in Moldavia. István Vöő and Pál Teiszler studied the

department until 1990. This points out clearly that the system did not support supplementing of departments by granting tenure to young professionals.

characteristics of the Hungarian dialects of the Bánság in many of their writings, while Márta Vámszer, Elemér Lakó, and János Péntek dealt with Kalotaszeg. Occasionally, smaller reports on the work of the linguists of Kolozsvár were written and published by Pál Teiszler, Dezső Balogh, Attila Szabó T., and Gyula Márton. There were several publications concerning the dialects of the Székelys, the most numerous of which belonged to Gyula Márton, Márta Vámszer, Mózes Gálffy, Lőrinc Szász, and Pál Teiszler. László Murádin's interest was mainly in the dialects of Mezőség.

3.3. The second generation (1972–1990)

In the previous section, we have already listed the names of the researchers who, following Gyula Márton's resignation and four years after his death (1976), carried on the matter of Hungarian dialect research in Romania. We can describe this period as a relaxation after a long and intense work. It is only natural that several factors may have contributed to it: on the one hand, in Gyula Márton's absence, the motivation to continue these large-scale projects may not have been strong enough. On the other hand, we should not forget that by this time linguistics in Kolozsvár had lost its own department, and for thirty years work had to be done under the circumstances of the minority status, which was not supported either institutionally or financially or ideologically.

The goal set by the previous great generation (Attila Szabó T., Mózes Gálffy, Gyula Márton), that is, collecting dialect material, had been reached; nevertheless, some circumstances intervened and prevented work from being completed. Atlases whose material had already been collected, structured, and edited could not be published, and, consequently, research was difficult due to severely restricted access; moreover, reviewing materials recorded on tags took far too much effort.

As mentioned earlier in connection with *NyIRK*, several works were completed that dealt with the phonetic or morphological aspects of the material collected despite the inconvenient circumstances. From the 1960s onwards, members of the second generation published such works and articles under Attila Szabó T. and Gyula Márton's direction – Elemér Lakó: *A kalotaszegi nyelvjárás magánhangzói* [Vowels of the Dialect of Kalotaszeg] (Bucharest, 1973), Zoltán Szabó: *A kalotaszegi nyelvjárás igeképző-rendszere* [System of Verbal Derivational Suffixes in the Dialect of Kalotaszeg] (Budapest, 1965), Pál Teiszler: *A Nagykároly környéki magyar nyelvjárás magánhangzórendszere* [Vowel System of the Hungarian Dialect of Nagykároly and Its Region] (Bucharest, 1973), Márta Vámszer*: A kalotaszegi nyelvjárás igeragozási rendszere* [System of Verb Conjugation in the Dialect of Kalotaszeg] (Bucharest, 1972), Isván Vöő: *A bánsági magyar nyelvjárások magánhangzórendszere* [Vowel System of the Hungarian Dialects of Bánság] (Bucharest, 1975). In the meantime, the emphasis shifted to other aspects:

folk vocabulary and its ethnographic background, the examination of bilingualism on the dialectal level, including the influence of the Romanian language, and the examination of names based on dialectal material (Szabó Z. 1993: 1431).

These areas of interest were slowly becoming more prominent than dialect research, and their interest extended beyond post-regime transition.

3.4. Hungarian dialect research in Romania after 1990

The beginning of the 90s marked the beginning of an era, and this is a relevant point not only from the aspect of the division of the dialect research but also of any human area which, after being somewhat oppressed, could liberate itself after the fall of the old socio-political system. From our point of view, the year 1990 brought about many changes in many respects. On the one hand, the borders were no longer closed between the countries inhabited by Hungarians, so that the fragmented Hungarian scientific community could begin to converge again. On the other hand, it also meant a significant change in the life of the Hungarian departments of the University of Kolozsvár, as János Péntek had an institution-building role comparable to that of Gyula Márton.

János Péntek discussed the changes brought about by 1990 and the twelve years that followed (see Péntek 2001). Péntek emphasized that Transylvanian areas were almost entirely excluded from Hungarian dialectological research, while Hungarian dialect atlases and large regional ones were continuously produced. Quite ironically, the publication process of dialect atlases compiled with great sacrifices hit obstacles just after the completion of the editing phase. The publication of half or fully completed atlases seemed hopeless before 1990 (Péntek 2001: 20).

An exciting feature of this era is that the centre of research on the Hungarian dialects spoken in Romania was transferred to Hungary. *Magyar Nyelvtudományi Társaság* published two volumes of *A moldvai csángó nyelvjárás atlasza*; moreover, in 1995, the publishing of *A romániai magyar nyelvjárások atlasza (RMNyA.)* also began.

The desperate situation in which *RMNyA.* was from the point of view of the publication came to an end thanks to the patronage of *Magyar Nyelvtudományi Társaság* and the financial support of *Országos Tudományos Kutatási Alap (OTKA)* [Institutional Funding for Public Research].

This was the time when a working group of young researchers and university students at the Department of History of Language and Dialectology of Eötvös Loránd University (Budapest) was established, whose tasks were the editing, the technical design, and preparation of the publishing process (Juhász 1995: 13).

By now, all the atlas material has been printed. The last, eleventh volume of the series was published in 2010.[7]

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7   On the history of publishing the *RMNyA.*, see Juhász 2016.

László Murádin, the collector of *RMNyA.*, who stood almost alone in Transylvanian Hungarian dialect research after the 1960s, had several papers published, which mainly comprised the results of his analysis of the *RMNyA.* database.[8]

Before his death, Gyula Márton collected the dialect of his homeland on his own, and as a result of his work *Szilágysági nyelvatlasz* was published in 2000. The Hungarian handbook of dialectology edited by Jenő Kiss (2001) comprised the results of the analyses that Transylvanian researchers of the 20th century had performed. Thanks to the completed geolinguistic database, the perception of the Csángós' origins has also changed (Péntek 2001: 20–21).

Although not related to Hungarian dialects in Romania, it is necessary to include József Szabó's monography entitled *Magyarországi és jugoszláviai magyar nyelvjárásszigetek* [Hungarian Dialects Islands in Hungary and Yugoslavia] in this review of the history of research since it is the first monographic volume that deals with Hungarian dialect islands on a regular basis. As we can find in the introduction to his volume, József Szabó's interest in dialect islands arose in the early 1960s, when they were collecting dialectal data in Kiskundorozsma under Professor Antal Nyíri's leadership. He took part in this activity as a student of the Hungarian linguistic study group. After a while, it struck him that the language spoken in Dorozsma, which had been integrated with Szeged, is much different from the dialects of Szeged and its surroundings. Then, he examined other topics as well; however, after about two decades, he started to focus – this time more consciously – on examining Dorozsma's dialect, and then he began researching most of the other Hungarian dialect islands (Szabó J. 1990: 7).

The author states that the backlogs encouraged him to contribute to the development of science by examining and describing Hungarian dialects, and accordingly dealt primarily with the dialect islands in Hungary. We could also learn that this was due to administrative reasons, as it was well known that collecting dialect data in surrounding countries was likely to be prohibited or at least to be made more difficult. Therefore, József Szabó used the completed database of *Magyar Nyelvjárások Atlasza* [Atlas of the Hungarian Dialects] to achieve his research goals, which he also supported with his own work of collecting linguistic data (Szabó J. 1990: 45–46). However, Yugoslavian settlements appeared among his research points, making it possible to discuss Hungarian dialect islands. In his analysis, he carried out thorough statistical work on the classification of the selected settlements (about 200 pages deal with the topic), which he then summarized at the end of the thesis.

Edit Kádár regards publishing dialect and regional language atlases as the most significant achievement of the period between 2002 and 2013. This activity could be seen as the result of the convergence of the linguists from Hungary

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8   For more information about László Murádin's work, see Kádár (ed.) 2016.

(especially Budapest) and Kolozsvár. One of the essential methodological innovations of recent decades was the appearance of computational dialectology, which was first used in the digital editing of language atlases. Later on, *Geolingvisztikai Műhely* [Geolinguistic Lab] mobilized enormous resources to make the achievements of the previous highly productive century accessible and researchable. Thus, thanks to this cooperation, a digital dictionary of the Szamoshát dialect and the audiobooks of István Vöő have been produced recently. The 22 questionnaires in the atlas were processed by Noemi Gál (Fazakas) and Mária Hochbauer. They already belong to the generation of the Kolozsvár School of Hungarian Linguistics after 1990 (Kádár 2015: 36).

It is imperative to highlight the names of Domokos Vékás and Fruzsina Sára Vargha in this regard. They have developed a digital tool that is exceptionally versatile and has also taken Hungarian dialect research to a new level. Around Bihalbocs (www.bihalbocs.hu), a computer-based geolinguistic program, a whole school of young researchers has been organized, who have been doing a computer-based, almost unlimited research from the perspective of a new approach. The informatization and integration of several Hungarian geolinguistic atlases is also their merit.[9]

Thanks to the Bihalbocs software, simultaneous analyses of a tremendous amount of data can be carried out in Hungarian dialectology. This helps researchers achieve results that humans cannot do, and this is dialectometry, a method which Vargha discusses comprehensively from the Hungarian perspective in her volume published in 2017 (see Vargha 2017) and with the application of which I have also dealt with in earlier publications (Both 2020b) and research on the Hungarian dialect islands in Romania.

Since the 1990s, the Department of Hungarian and General Linguistics staff in Kolozsvár has hardly ever dealt with dialectological research, either by collecting new data or by further processing previously collected materials. The works of the atlas were also interrupted; for example, the material on Székelyland has still not been published. In many cases, the linguists' attention was distracted by the existence of a specific minority situation (organization of education, protection of minority language rights, sociolinguistic issues affecting the minority situation). The department would have to cover the full linguistic training of future Hungarian teachers; thus, it has been inevitable for them to put more emphasis on other areas of linguistics. However, from the previous great generation, János Péntek came forward with significant dialectological works concerning the region. In the context of dialect research in Romania, and more specifically in that of the present article (Péntek 2005), János Péntek's speech at the Hungarian Academy of Sciences, in which he gave a comprehensive presentation on the Hungarian

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9   About the diversity of usefulness of informational data, see: Vargha–Vékás 2009; Vargha 2015a,b, 2016.

language and dialect islands in Romania, is of utmost importance. Bálint Csűry's plan, namely publishing the dictionary of the Moldavian Csángó dialect, has also been carried out by János Péntek. The result of the editorial work lasting for years is *A moldvai magyar tájnyelv szótára* [The Dictionary of the Hungarian Language in Moldvaia] in three volumes published between 2016 and 2018 (see Péntek 2016b, 2017, 2018).

4. Summary

In this article, we have looked back on over a hundred years of research in a field that has long been one of the main driving lines of Hungarian linguistics.

As could be seen, the position of the school of Hungarian linguistics in Kolozsvár has changed considerably, both administratively and politically. The use of the Hungarian language in Romania has been somewhat reduced for an extended period, and Hungarian-language secondary and higher education itself has been relegated to the background. So were the institutions themselves, which served the educational activities.

In a minority situation, and at the same time in a disadvantaged position, the staff of a Hungarian language department did not have the privilege of specializing in a very specific field, and it became inevitable that each of them should be actively involved in several fields of linguistics, both as teachers and researchers.

The above processes have directly affected the possibilities of dialectological research: dwindling resources and new challenges have gradually diverted attention from the study of Hungarian dialects in Romania, which has been marginalized.

Despite all of this, the school of Hungarian linguistics in Kolozsvár has achieved significant results, especially in dialect data collection, and has succeeded in providing a reliable and qualitative snapshot of the Hungarian dialects in Romania 75–100 years ago. Furthermore, this is perhaps more important than whether these data have been evaluated in detail.

It seems obvious, yet it should be mentioned, that research should only be done on available data. However, the nature of language and the time are such that it is not possible to collect living language material retrospectively.

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Metaphors of Globalization

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Abstract. The organization and function of human society in the global economy is, in the current discourse, part of epistemology, developed on the broader link of social sciences with scientific creativity and artistic imagination. The "chaotic" synergy of globalization has developed on a conceptual network where the logic of conceptual metaphor and cognitive scenario are integrative and circular. It is this assertion we start from in the research on the interdisciplinary character of the metaphor of globalization, with special attention paid to *the metaphors of the organic, of space, of movement* (the spiral formula, the loop, centre-periphery, the metaphor of the nebula, man as a sum, etc.). The research method (contrastive, functional, analytical) has in view the interdisciplinary and dynamic character of metaphors that highlight the conceptual system beyond the research. The conclusion of the study is that the role of interdisciplinary metaphors is to fuse with the text and arguments of an entire conceptual system it generates.

Keywords: cognitive metaphor, globalization, interdisciplinary, analytical, conceptual system

1. Introduction

The nature of specialized metaphor in the field of social and political sciences generally repeats the nature of language, at another dimension, if we have in view the cognitive essence of metaphor, as well as its finality – the creation of new content. It is necessary, before all else, to delimit the area of research: the nature of specialized metaphor, be it only partially, the "experiential" essence of metaphors in the field of study, the nature of terminological/conceptual metaphor in the sphere of "hard" sciences. Being neutral under the aspect of utterance expressivity, specialized metaphor is extraordinarily productive in the creation of new significance, firstly due to its experiential nature. Our research partially follows the cognitivist theory developed by Lakoff and Johnson (1980) according to which the organization of linguistic content is realized following

a preconceptual pattern known from experience and expressed metaphorically. According to Lakoff and Johnson (1980: 124), "our conceptual system thus plays a central role in defining our everyday realities".

2. Experiential essence of the cognitive metaphor in economic sciences

In the epistemology of social and political sciences, metaphoric competence is partially grounded in the elements of everyday life, existing in thinking and in action, organized on scenarios: human behaviour has generated one of the fundamental scenarios of traditional microeconomics – the scenario of *Homo Oeconomicus*. Another feature of human behaviour is play. What are *economic* and *political plays* if not conceptual metaphors, forms of expansion of group and/or collective experience, as well as superior knowledge coming from this experience?

We shall not dwell on this context of biological, cultural, spiritual, or autonomous bases of play (cf. Huizinga 2003) but on its rules. On the metaphor of play, the 20th century developed the *competition scenario*, engaging numerous interdisciplinary metaphors in political sciences (political play, underground political games, strategy games), in the economic field (referee, game – economic play, the play of economic actors, the play of offer and demand, theory of play, play in null sum, the rules of the economic game (Butiurca 2014)), in arts and culture. Far from having become a worn-out representation, the metaphor of the game is in fashion in the epistemology of current political models, in the theory of globalization: globalization has "the consistency of a constructivist process with institutional architecture, based on non-conflict rules (non-violent), of calculated risk and anthropic and ecological post-efficiency criteria, with post-industrial, post-corporatist creative systems" (see Dinu 2006). Understanding globalist theories seems to be more accessible through the scenarios of "rules of the game". Comparing the scenario of the competition, developed on the general metaphor of game in the economic field, with the "rules" scenario from the speeches on the topic of globalization, we cannot fail to observe the mutations in conception and philosophy: *Homo Oeconomicus* is an integral part of the competition, the 21st-century man (co)participates in the "rule" imposed by the "game of globalization".

The competition scenario, at least at the level of metaphoric constructs, is doubled by the *rules of the game* scenario, in a century of globalization.

In the process of denomination, the reinvigoration of specialized vocabulary occurs also on the basis of moral experience, also living the religious mysteries. As we pointed out on a different occasion, in Latin mythology, *moneta* was used as an epithet with the acceptation of "councillor" to define one of the

attributes of goddess Juno (the mint of Rome was in Juno Moneta's temple), the term circulating in current economy (in Italian: *moneta bassa*). In international terminology, the doublet *moneda/moneta* circulates – the first having a Greek etymon, the second a Latin one. Both forms have led to the same metaphorical concept: an instrument of payment. *Moneta* has maintained its metaphoric construct status in derivatives, compounds, poly-lexical constructs, etc. In Pan-Latin terminology, there are approximately 17 metaphoric constructs, formed by expansion, based on the preconceptual model [*monedă comercială* 'commercial currency' (Fr. *monnaie commerciale*; Sp. *moneda comercial*); Ro. *monedă fără valoare*; Ro. *monedă din aur şi argint* (Fr. *monnaie en or et argent*; Sp. *moneda de oro y plata*, etc)]. In English, the concept of *money* has developed from the same Latin model *moneta* (Skeat 2007: 307).

Situated at the conceptual level, metaphor as a totality of possible realizations plays a fundamental role in defining exchange, the economic process, at the particular level of the economic field. The way in which a metaphor / a metaphor system works within a cognitive scenario reflects above the particular concrete phenomenon of the general doctrine, the superior organization model and function of a social and political reality. The capacity of the generic metaphor "moneta" to develop specialized senses is given by its interdisciplinary status in general; the capacity of the construct to transcend the designation of the particular case is in close relationship with the social, political model, which works at a macro-systemic level. Compare cognitive constructs: *monedă naţională* 'national currency' (ubiquitous in the economic language of the 20th century, and not only!) with *monedă comună* 'common currency', *monedă mondială* 'world currency', *monedă globală* 'global currency' (see Gălăţeanu 2012), *internaţionalizare monetară* 'monetary internationalization' (fundamental concept in discourses referring to financial globalization in the 21st century). The finality of the interdisciplinary socio-political metaphor goes beyond the boundaries of language, but also beyond the strict boundaries of one scientific domain or another, justifying itself above them at the high level of thinking and configuring concrete and/or theoretical models of organizing human experience.

What is more, as Kiseleva and Trofimova (2017: 233) point out:

> Metaphorization is considered not as a juxtaposition of isolated properties of conceptual metaphor, but as a complex one – a mental operation with holistic mental structures. The environment of metaphorization is a conceptual sphere of representation of knowledge, as voluminous as cognitive models, frames and pattern schemas. The image serves as the basis for operations that facilitate understanding metaphors and images by activating the corresponding relationship with the sensory experience, regulating the deployment of imaginative schemas.

3. The cognitive scenario in the sciences of ideology theorization/orientation

It is necessary to delimit informational and epistemological indices of the cognitive scenario of social disciplines from the type of information totalled in the scenario/specialized metaphor in other scientific fields.

The cognitive scenario follows a logical and objective path in general in the field of sciences. In spite of this, adaptation to the type of information and appropriation of the vocabulary to the message can decisively influence the textual organization techniques, making the necessary differences. In no other field do the cognitive scenarios, developed based on conceptual metaphor, have a bigger impact on the message and its reception than in the sphere of socio-human and political sciences. It is this reasoning for which the texts from these fields only partially eliminate the participative/subjective implication of the author/emitter.

Another feature that individualizes sociological hermeneutics in relation to the sphere of "hard" sciences is the fact that through the cognitive scenario developed on the basis of metaphoric constructs, the emitter does not name *objects/concepts* but *mental representations* of the objects/concepts, representations that are not individual creations. One such scenario abides by an algorithm of selection of certain elements of knowledge (scientific concepts, ideas) and information, in consonance with the theoretical, ideological, political model that is to be promoted. They are elements doubled by representations, by rhetoric markers able to meet the demands of the authentic cooperative principle between *emitter* and *receiver* (see Grice 1975).

The numerous cognitive constructs in the field of *globalization*, for example, develop as eclectic scenarios under the aspect of the preconceptual model, being different as a way of representing concepts from one author to another: the scenario of redemption (the Supernational is not redemption, states Dinu in 2006: 44), the scenario of the haunted space, the scenario of the wedding, etc.

The process of globalization is often represented through the metaphor of the entity in motion. There are only a few interconnected cognitive representations, illustrative for the significance of creation technique having as justification the orientation of the discourse towards the receiver on the one hand and abiding by the adversity logic of national, trans- or supernational on the other hand. The excerpted examples are illustrative from the point of view of cognitivist orientation, according to which the metaphoric construct "allows for the understanding of something (and its experimentation) in terms of something different" (Lakoff–Johnson 1980/1985: 15): *the history of nations* is neurosis, *the end of nations* preceding globalization is *redemption*, etc. It is easy to observe how the *creation of significance* is seconded by the *vehiculation of significance* in sociological texts, a technique that serves best the purpose of communication in the field.

The transition from "national" to "supernational" and globalization is represented as a scenario of the Apocalypse ("the world to give the answer to the question above is one that has to exit the logic of the national, even if that means an identity crisis of apocalyptic type" (Lakoff–Johnson 1980/1985: 15). Applying one of Lakoff's schemes (1980: 285), the elements of this scenario are: 1. *the initial situation*: exhaustion of the "national"; 2. *event*: the nation-state and the appearance of a supernational power, of rules for international order, development of a phenomenology of adversity, propagation of the globalization ideology, etc.; 3. *final situation*: acceptance of fundamental social, ideological existential change by the citizen. Globalization is represented by an eschatological scenario of the second degree/interdisciplinary, a scenario derived from a primary representation of the end of the world, religious in source.

4. The metaphor of globalization: Classification criteria

Conceptualization in the lexis of institutions and in the future structure of the social organization of the world is a highly complex aspect. The analysis criteria of the metaphorization sources are varied, and we shall only dwell on a limited number. As Schlanger (1997: 97) points out, specialized metaphors have "cultural density and history".

Analysed according to the criterion of the *source domain*, the metaphors from the sphere of globalization come from various cultural domains, among which we mention religion (metaphor of redemption), economy (agent / international actant), theatre (actors of globalization), culture (history of traditional nations is neurosis), connected sciences (physics, mathematics), etc.

The terminology of general economy is interested in ontology (from the viewpoint of the organization of the living world), whose structure is reflected at the abstract level of theorizations, by assemblies and subassemblies of concepts. Unlike the metaphors of the economic vocabulary, characterized by *ontological density* (banking products are objects, money is an organism), the metaphors of globalization have *anthropological density*. The anthropological metaphor is especially productive and is distinguished through a high degree of creativity: globalization is an entity on the move, the nation-state, parties, national companies are actors on the move; common currency is represented as a human being in need of protection; post-national evolutions are entities experiencing tragedies of the death of values such as sovereignty, independence.

The anthropocentric perspective in the terminology of contemporary sociology/ economy implies, both conceptually and under the aspect of the philosophy of language, the human being with every specificity (relationships, events, body parts, feelings, perception), as a model of representation of the abstract. There

are three conceptual subsystems that the anthropocentric model develops in research: a. sensations: evolutions are experienced as death tragedies; the traditional history of nations is neurosis ("globalization brings a new order which attempts to make it impossible for old historical neurosis to exist", cf. Dinu 2006: 29); b. body parts (see the metaphor of the "invisible hand", arm, head); c. events and relationships (globalization is a wedding).

Mână 'hand' is a quasi-universal metaphoric construct, coming from the Greek–Latin languages and maintaining its status as a preconceptual model in most specialized fields, as well as its status of term in English and Romance languages: Rom. *manufactura* (Fr. *manufacture*; Sp. *manufactura*; Engl. *manufacture*); Rom. *manuscris* (Fr. *manuscrit*; Sp. *manuscrito*; Engl. *manuscript*), etc. – in marketing the *management* conceptual metaphor (cf. Engl. *management; Fr. management; Sp. management*) developed *in nuce* on the model of *manus.*

The anthropocentric perspective in the representation of features, concepts of science goes beyond univocal anatomic references. Unlike figurative language (anthropomorphizing/personification), conceptual metaphors in the category meet the criteria of univocity. Anthropomorphizing is an aesthetic procedure, and anthropocentrism is a conceptual, methodological and linguistic philosophy perspective, foreign to rhetoric. Anthropomorphizing implies, in our conception, all the dimensions of the human, from the biological to the psychological and the spiritual. We consider the anthropocentric perspective in terminology to be an epistemological method that implies the human being as a model of representation of the abstract.

An important source of conceptualization in the terminology of the socio-human field is the mineral universe and the elements of the cosmos, where scientists have found models of knowledge and representation of the abstract. The metaphor of the ostrich, the metaphor of sand (supernational is sand), the metaphor of the space capsule, of the rift are part of the class of the so-called organic metaphors (together with the metaphors of the human) and have become a topic in representation techniques of concepts in texts about globalization: the supernational and the national are *spill spaces* (for neuroses, illusions, ambitions, risks).

5. The epistemological metaphor: The space capsule

Unlike the sphere of spatial economy, international commerce, where conceptual content has developed on the basis of numerous agglomeration theories, the physical, concrete space (theory of location, theory of spatial equilibrium, cf. Alonso 1965; the centre-periphery model, cf. Krugman 1991), in the language of social sciences, *space* has ontological and epistemological dimensions. Conceptual representations of *space* are plurivalent. As Kövecses (2010: 202) highlights:

Spatial relations are commonly understood as parts of the human body (e.g. the head means up, and the feet means down).

These conceptual metaphors and the large-scale processes they underlie are global design features of modern humans' brain/mind. They represent global metaphoric potentialities, or principles, of a cognitively fluid brain. It seems to be clear at this point that commonality in human experience is a major force shaping the metaphors we have. It is this force that gives us many of the metaphors that we can take to be near-universal or potentially universal. But commonality in human experience is not the only force that plays a role in the process of establishing and using metaphors.

There are also countervailing forces that work against universality in metaphor production.

On the one hand, we have dematerialized, open space (frequent in expressions such as "accessible space"), cognitive representation of human conscience (open space = innovative conscience). It is – in the metaphoric sense – the privileged space of high ideas, beliefs, and skills. On the other hand, there is a closed space of spilling obsolete ideas, vices of man, of nations and society. Between the two cognitive dimensions, there is no communication channel, a fact that metaphorically suggests the necessity for fundamental changes at the level of consciousness, accepting individual and macrosocial evolution. The fundamental characteristic of conceptual space is discontinuity, unlike poetic representation, for instance, where epic space is continuous and time is infinite.

We are referring to the *space capsule* in the language of social sciences, sometimes multiplied (space capsule of the new space capsule doctrine / space capsule of old ideologies) and/or organized according to a bivalent logic, in a binary system. The only one capable of neutralizing opposition is human conscience by relation to one system of ideas or another. Other metaphors of space capsule are: the cage (ahistorical resources = cage), precariousness zones, space haunted by fantasies, ghosts (traditional nations are haunted, uninhabited spaces), the metaphor of nested hexagons (Launhardt 1887, W. Cristaller 1933). Representations of the space capsule are not the result of arbitrary choices if we have in view certain aspects: a theoretical system highlights not only the profile of the theorist but also the extended cultural and intellectual identity of the epoch, the general context where the system was elaborated. The scientific text, discourse then has a logical purpose – consisting in understanding new "experience", a new world, whose rules cannot remain foreign to the Other.

In the sciences of theorizing/orienting ideology, the theorist and receiver meet: the theorist to make a content of the researched discipline known and/or to persuade using arguments and conceptual representation, the receiver to acquire information necessary for their own knowledge. Specialized metaphor and the

metaphoric scenario are, if only partially, cognitive elements of the rhetoric of current discourse, illustrative of the persuasive feature of language.

6. Conclusions

The style of ideology theorization/orientation, of the economy, of sociology is far from being sober, concise, lacking creative expression. Scientific rigour, objectivity claims are, if in part, doubled by subjective marks, manipulative and creative. Specialized metaphor (cognitive and linguistic in nature) and the cognitive scenario (apocalypse, competition, *homo oeconomicus*, etc.) are representations of abstract concepts. Interconnected cognitive scenarios, ontological metaphor, metaphors of the organic, and epistemological metaphor are relevant for the doctrine theorist's recurring manner of thinking.

Interdisciplinary metaphor in the field of social sciences is in close relation of dependency with the conceptual components/semantics of the scientific field, which it transcends: the emitter does not name objects/concepts but the mental representations of objects / abstract concepts – representations that are not individual creations. The interdisciplinary and dynamic character of metaphors highlights the conceptual system they spring from, their role being to fuse with the text and arguments of an entire conceptual system they generate.

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Endzeitstimmung
Der Umgang der evangelischen Kirche A.B. mit der Aussiedlung der Siebenbürger Sachsen

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Abstract. The present paper deals with the attitude of the Evangelical Church of Augustan Confession in Romania (the Lutheran Church of the German-speaking Transylvanian Saxons) regarding the massive emigration of the Saxons after the events of December 1989 in Romania. The investigation is based on official documents of the Central Consistory of the Evangelical Church, from the central church archives in Sibiu/Hermannstadt at the Friedrich Teutsch cultural centre, as well as several editions of the publications *Landeskirchliche Information* (numbers 1 to 6 of the 1st year) and *Kirchliche Blätter* (numbers 1 to 12 of the 18th year). The analysis in the present study covers the year 1990 and shows the Evangelical Church as an institution that tries to face the challenges caused by the massive wave of emigrated Saxons. The topics the church leadership dealt with can also be found in the public discourse in the periodicals of the church. They were visibly trying to adapt to the new challenges; the responsible were constantly looking for solutions in order to be able to maintain the structures of the church.

Keywords: Transylvanian, Saxons, emigration, Evangelical Church of Augustan Confession in Romania, church leadership, church periodicals

1. Einleitung

Der vorliegende Artikel behandelt die Haltung der evangelischen Kirche A.B. in Rumänien hinsichtlich der Auswanderung der Siebenbürger Sachsen nach den Ereignissen vom Dezember 1989. Als Quellen dieser Untersuchung dienten Dokumente der evangelischen Kirche aus dem Zentralarchiv im Hermannstädter Begegnungs- und Kulturzentrum Friedrich Teutsch, sowie Ausgaben der Publikationen *Landeskirchliche Information* und *Kirchliche Blätter*. Eingesehen wurden die Ausgaben 1 bis 6 der *LKI*, die Nummern 1 bis 12 des 18. Jahrgangs der *KB*, sowie die

Sitzungsprotokolle des Landeskonsistoriums der evangelischen Kirche A.B. in Rumänien. Die Analyse beschränkt sich in der vorliegenden Arbeit auf das Jahr 1990.

Ausgehend von den Daten der evangelischen Kirche, wird der Ausmaß der Massenauswanderung im Jahr 1990 schnell deutlich: zählte die evangelische Kirche am 31. Dezember 1989 101.923 Seelen, so ist diese Zahl bis Ende des Jahres 1990 auf geschätzt 40.000 geschrumpft.[1] In diesem Kontext musste sich die evangelische Kirche rasch auf die neue Situation einstellen, die unvorhergesehene Probleme mit sich brachte. Die von der neuen Situation verursachten Problemfelder sollen hier verdeutlicht und untersucht werden. Durch die Analyse der Archivdokumente soll erörtert werden, wie die evangelische Kirche mit diesem „Bruch in der Geschichte"[2], mit diesem „Strukturverlust[3]" umgegangen ist. Hat sie versucht, ihre Mitglieder – und ihre Pfarrer – zu beeinflussen, in die eine oder andere Richtung (Aussiedlung oder Verbleib in der alten Heimat) zu lenken?

Der erste Teil der Arbeit soll die Problemfelder darstellen, die sich nach der Untersuchung der Publikationen und Unterlagen herauskristallisiert haben. Ein weiterer Teil der Arbeit beschäftigt sich mit der Untersuchung der Stellungnahmen der Kirchenvertreter, die in den bereits erwähnten Publikationen an die Öffentlichkeit gelangten. Diese werden als Kommunikationsmittel mit der Öffentlichkeit betrachtet, um prüfen zu können, welche Informationen an die Leser gebracht wurden und mit welcher Absicht. Dabei soll festgestellt werden, ob die im Titel angedeutete Endzeitstimmung an die Öffentlichkeit vermittelt worden ist oder nicht.

Zum Korpus des Beitrags soll erwähnt werden, dass viele Unterlagen im Zentralarchiv der evangelischen Kirche nicht systematisiert, und nach jetziger Kenntnis nicht vollständig sind – bei den bisherigen Untersuchungen hat sich gezeigt, dass aus den Sitzungsprotokollen oft z.B. Anhänge, Beilagen fehlen. Die Publikationen der evangelischen Kirche bieten auch in dieser Hinsicht eine große Hilfe und dienen als Ergänzung zu den Archivunterlagen.

2. Die evangelische Kirche 1990 – Definierung und Neudefinierung

Bereits vermerkt wurde die erschreckende Zahl der Auswanderer zwischen Ende des Jahres 1989 und Ende 1990. Nicht nur die Zahl der Kirchenglieder ist gesunken, viele Pfarrer entschieden sich ebenfalls für die Auswanderung. Über den Personalstand der Pfarrer lesen wir im Bericht der Kanzlei bei der Sitzung des 28.

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1   Diese Zahlen unterscheiden sich wesentlich von den offiziellen Angaben des Nationalen Statistikamtes für das Jahr 1990. Auf diese Ungereimtheiten soll hier nicht näher eingegangen werden.

2   *Landeskirchliche Information – Amtliches Informationsblatt des Landeskonsistoriums der evangelischen Kirche A.B. in Rumänien* (2/1990):2.

3   Ebenda.

Landeskonsistoriums vom 23. Januar 1990, dass der Kirche 112 Gemeindepfarrer und 8 weitere Theologen dienen.[4] Zwar hat diese Zahl im Laufe des Jahres nicht so drastisch abgenommen, wie es im Fall der Gemeindemitglieder war, dennoch ist die Zahl der Kirchendiener um über einen Viertel zurückgegangen. Gemäß des Kanzleiberichtes vom 7. Dezember 1990: „Unsere Kirche zählt heute 81 Pfarrer im Gemeindedienst und 8 Theologen mit anderer Beauftragung. […] Die Zahl unserer Kirchengemeinden wird heute mit 250 angegeben, wobei die Kleinstgemeinden, die nur noch als Betreuungspunkte gelten können, mitgezählt sind."[5] Im Jahr 1990 haben demnach 31 Pfarrer das Land verlassen.

Der gesellschaftspolitische Umbruch nach dem Sturz des Diktators 1989 stellte die evangelische Kirche vor die Aufgabe, sich im neuen Kontext institutionell und öffentlich neu zu definieren. Und das nicht nur wegen der Auswanderung: Die Frage nach der „Schuld" der Kirche zu den Zeiten des kommunistischen Regimes war ebenso ein beherrschendes Thema, das bereits beim ersten Treffen des Landeskonsistoriums im Jahr 1990 zur Sprache kam. Diese zwei Probleme bestimmte auch die Beratung der Mitglieder des Landeskonsistoriums und der Bezirksdechanten vom 8. Januar 1990[6]: Ohne auf das Thema „Schuldenbekenntnis" weiter einzugehen, muss hier erwähnt werden, dass diese Problematik in den kirchlichen Leitungsgremien, wie auch in den kirchlichen Publikationen sich als ein kontroverser Diskussionsgegenstand erwies.

Die institutionelle Neudefinierung, die Erarbeitung einer neuen Kirchenordnung, soll in diesem Beitrag noch angesprochen werden. Zuerst sollen hier die Versuche einer öffentlichen Neudefinierung im Rahmen der Publikationen, der *LKI* und der *KB* kurz dargestellt werden. In der ersten Ausgabe der *Landeskirchlichen Information* schreibt Eginald Schlattner:

> *Bei uns als Leib Christi durch die schockartige Schrumpfung der Gemeinden verstümmelt, als Raum der Herausgerufenen und Versammelten nunmehr ein statistischer Rest von Verstörten und Versprengten, die nicht mehr aufeinander hören und nichts mehr von einander wissen – die Bilder der Bibel tragen, sie decken jede Wirklichkeit ab. Aber – was folgt, IST NICHT DAS ENDE, SONDERN DIASPORA, die Gemeinde in der Zerstreuung.[7]*

Ähnliche Schlüsse zog in einem Artikel für die *Kirchlichen Blätter* Dietmar Pleier, auch, wenn er viel konkreter und drastischer die gefährdete Existenz der Kirche im Herbst 1990 formuliert:

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4   Zentralarchiv der Evangelischen Kirche A.B. in Rumänien (ZAEKR), Bestand Z. 134-V/1990, Bericht der Kanzlei des Landeskonsistorium über die Zeit vom 20. Dezember 1989 bis 23. Januar 1990, S.2.

5   ZAEKR, Z. 2186-V/1990.

6   Undatiertes Protokoll.

7   *Landeskirchliche Information*, (1(1)):2.

[...] die Existenz dieser Kirche, unser Sein und Nichtsein, steht auf dem Spiel. [...] Wir wissen nur, daß[8] noch viele, sehr viele auf ihr blaues Büchlein warten. Und wir wissen, daß noch viele eine abwartende Haltung einnehmen und heute oder morgen auch gehen können. Unsere Kirche ist im Umbruch: aus einer Volkskirche im guten Sinn des Wortes wird nun eine Diasporakirche, eine Kirche in der Zerstreuung.[9]

Zwei veranschaulichende Zitate zur Selbstwahrnehmung der evangelischen Kirche, im Hinblick auf die immer weiter schrumpfende sächsische Gemeinschaft.

3. Identifizierung der Themenschwerpunkte

Aufgrund der Untersuchung können nach dem Umbruch im Dezember 1989 folgende Themenschwerpunkte identifiziert werden, deren mögliche Lösung die Kirchenleitung im Jahr 1990 wesentlich beschäftigt hat:

Die Kirche hatte nicht nur mit der Abwanderung ihrer Mitglieder, sondern auch mit einem Personalmangel zu kämpfen: die Kirchenleitung setzte sich intensiv mit der Problematik der Auswanderung von Pfarrern auseinander – parallel damit war auch die Anstellung der emigrierten Pfarrer in Deutschland und in Österreich ein Thema.

Die Situation, in der sich die evangelische Kirche 1990 fand, machte die Änderung und Neufassung der Kirchenordnung dringend notwendig: Mitgliedzahlen der Presbyterien und der Gemeindevertretungen mussten neu errechnet werden, mehreren Gemeinden drohte der Entzug des Rechts auf Selbstverwaltung, da die Seelenzahl drastisch geschrumpft ist, andere Gemeinden wurden sogar aufgelöst.

Eine weitere Sorge der Pfarrer, die ans Landeskonsistorium herangetragen worden ist, war die Sicherstellung des Archivguts, um unwiederbringlichen Verlust oder großen Schaden zu vermeiden.[10]

Das vierte identifizierte Problemfeld ist die Ausweitung der Diakonie – ebenfalls als Folge der neuen Situation wurde bereits früh über Diakoniearbeit und über die Errichtung von Altenheimen diskutiert.

3.1. Zur Personalfrage der evangelischen Pfarrer

Wie bereits erwähnt, zählte die evangelische Kirche im Januar 1990 112 Pfarrer und 8 Theologen. Nach Kenntnis der Kirchenleitung erklärten 26 Geistliche ihre Absicht, das Land zu verlassen. 13 hätten die sogenannten „großen Formulare"

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8   Zitate wurden der neuen Rechtschreibung nicht angepasst.
9   Dietmar Plejer. 1990. Orientierung für eine Kirche im Umbruch, *Kirchliche Blätter*, (18(9)):1.
10   Thematisiert u.a. in der Sitzung des Landeskonsistoriums vom 1. August 1990.

beim Passamt beantragt.[11] Die Auswanderungstendenz hat im Laufe des gesamten Jahres nicht abgenommen, was in den Archivdokumenten zu verfolgen ist: im Bericht der Kanzlei vom 4. Mai 1990 lesen wir über den Personalstand der Pfarrer: „Im Dienst der Kirche stehen 97 Gemeindepfarrer und 7 weitere Theologen".[12] Es sei eine Zeit, in der „althergebrachte Strukturen und Ordnungen" der Kirche als Folge der Auswanderung „verstärkt zu wanken begannen"[13]

Die „Regelung des Dienstverhältnisses von Pfarrern und leitenden Beamten der Kirche, die ihre Absicht, auszuwandern, erklärt haben" wurde bereits bei der ersten Sitzung des Landeskonsistoriums im Jahr 1990, am 23. Januar, ausgesetzt. Aufgrund dieser Regelung wurde bis zum 20. Dezember 1989 das Dienstverhältnis der Pfarrer, die ihre Auswanderungsabsicht erklärt haben, in das eines Pfarramtsverwesers umgewandelt. Der Vorsitz in den Körperschaften wurde dem Kurator, oder einem Presbyter übertragen. Nach offizieller Begründung sollten dadurch die Kirchengemeinden die Möglichkeit erhalten, sich rechtzeitig auf die Pfarrvakanz vorzubereiten.[14] Aus dem Bericht der Kanzlei vom 23. Januar 1990 geht hervor, dass eine Bitte des Schäßburger Kirchenbezirks zur Überprüfung der Regelung bereits bei der Sitzung des Landeskonsistoriums vom 20. Dezember 1989 vorgetragen wurde.[15] In der gleichen Sitzung hat das Landeskonsistorium die Bezirke gebeten, ihre Vorschläge zur Änderung der Regelung vorzulegen. Die Neuregelung bezüglich der Anwendung des Rundschreibens LKZ. 338-V/1984 war nach einer Entscheidung des Gremiums bei einer kommenden Sitzung geplant. Im Kanzleibericht vom 12. Juli 1990 werden die Antworten aus den Bezirken Hermannstadt, Mediasch und Schäßburg vorgestellt: Alle Dekanate forderten die Aufhebung der Regelung, da sie rechtlich unhaltbar sei und zu Unaufrichtigkeit verleite.[16] Daraufhin hat das Landeskonsistorium beschlossen: „Pfarrer, die die definitive Ausreise vor dem 20. Dezember 1989 beantragt haben, aber noch im Dienst unserer Kirche stehen" mit dem 12. Juli 1990 in ihren ursprünglichen Status zurückzuversetzen[17].

Bereits Anfang des Jahres 1971 hat das Landeskonsistorium beschlossen, dass für das Bewerbungsgesuch um eine Pfarrstelle eine Erklärung benötigt wird, aus dem hervorgeht, dass der Bewerber die Ausstellung eines Auswanderungspasses nicht beantragt habe und einen solchen Antrag drei Jahre nach seiner Anstellung

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11 ZAERK, Bestand Z. 134-V/1990, Bericht der Kanzlei des Landeskonsistorium über die Zeit vom 20. Dezember 1989 bis 23. Januar 1990, S. 2.

12 ZAERK, Bestand Z. 767-V/1990, Bericht der Kanzlei des LK über die Zeit vom 23. Januar bis 4. Mai 1990, S. 9.

13 Ebenda, S. 1.

14 Siehe dazu u.a. ZAERK, 1382-V/1990, Bericht der Kanzlei in der Sitzung vom 12. Juli 1990.

15 ZAERK, Bestand Z. 134-V/1990, Bericht der Kanzlei des Landeskonsistorium über die Zeit vom 20. Dezember 1989 bis 23. Januar 1990.

16 ZAERK, Bestand LKZ 2-V/1990 zitiert im Kanzleibericht 1382-V/1990.

17 Siehe dazu ZAERK, Bestand Z. 1438/1990: XVI. Verhandlungsbericht über die Sitzung des 28. LK, S.5.

nicht stellen werde – ähnlich im Falle eines Dienststellenwechsels. Bei einem be-
reits gestellten Antrag auf die Auswanderungsgenehmigung galt, diesen zurück-
zuziehen. Diese Erklärungspflicht wurde 1984 auch auf kirchliche Beamte, 1988
auf Studenten der Theologie und auf Lehrvikare ausgeweitet. Die Ausstellung ei-
ner Dienstbescheinigung zur Beantragung der definitiven Ausreise wurde – wenn
die Betroffenen vor Ablauf der drei Jahre darum gebeten haben – verweigert. Die
Begründung für die Verpflichtungen war, dass ein Pfarrer (oder Beamter) Zeit
braucht, um seine Gemeinde kennen zu lernen und „fruchtbar wirken", bzw. um
kompetent arbeiten zu können[18].

Im Kanzleibericht vom 23. Januar 1990 wird das Landeskonsistorium um eine
Stellungnahme bezüglich dieser Angelegenheit gebeten, ob diese Erklärung „an-
gesichts der neuen Rechtslage in Rumänien […] auch weiterhin unerlässlich und
verbindlich" sei.[19] Die Beschlüsse vom 17. Februar 1971, 16. Februar 1984 und
16. Februar 1988 wurden in der gleichen Sitzung außer Kraft gesetzt. Das Landes-
konsistorium hat beschlossen, auf die Verpflichtung, drei Jahre nach der Anstel-
lung (oder bei Dienststellenwechsel) kein Auswanderungsgesuch zu stellen, zu
verzichten. Statt einer Erklärung der Studenten des Theologischen Instituts und
der Bewerber um einen Studienplatz, war ein Gespräch über die Absichten der
Bewerber vorgesehen.

In der Sitzung des 29. Landeskonsistoriums vom 7. Dezember 1990 wurden
zwei Vorlagen betreffend eine Übereinkunft zwischen der Evangelischen Kirche
A.B. in Rumänien und der Evangelischen Kirche in Deutschland, bzw. einer Ver-
einbarung mit der Evangelischen Kirche A.B. Österreich präsentiert. Die Doku-
mente stellen das Ergebnis monatelanger Verhandlungen zwischen Vertretern der
Kirchen dar. Es gab Beratungen im März und Oktober 1990, in Deutschland, aber
auch in Hermannstadt. Gemäß des Protokolls wies Bischof Christoph Klein in
der Sitzung vom 7. Dezember darauf hin, dass das Landeskonsistorium nicht den
„Pfarrern, die schon ausgewandert sind, Nachteile, sondern jenen, die noch eine
Zeit in unserer Kirche dienen, Vorteile schaffen soll."[20] Im Zuge der radikal verän-
derten Situation[21] sah sich die Evangelische Kirche A.B. Rumänien gezwungen,
ihre Haltung in Frage der Anstellung ausgewanderter Pfarrer zu überdenken: Im
Übereinkommen wird präzisiert, dass die Evangelische Kirche A.B. in Rumänien
nichts einzuwenden hat, wenn seine ehemaligen Pfarrer von der EKD übernom-
men werden – sei es mit oder ohne eine sogenannte Abgangsbescheinigung. Im
Dokument wird auch festgehalten, dass durch eine Zusage des Rates der Evange-
lischen Kirche in Deutschland Pfarrer, die im Ruhestand in die Bundesrepublik

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18   Vgl. ZAERK, Dokument 237-V/1990.
19   ZAERK, Bestand Z. 134-V/1990, Bericht der Kanzlei des Landeskonsistorium über die Zeit vom
      20. Dezember 1989 bis 23. Januar 1990.
20   ZAERK, Dokument 2164 –V/1990, S. 17.
21   Zitiert aus dem Text der Vorlage der Übereinkunft zwischen der Evangelischen Kirche A.B. in
      Rumänien und der Evangelischen Kirche in Deutschland.

übersiedeln, den Geistlichen, die ihren Dienst in der Evangelischen Kirche in Deutschland geleistet haben, finanziell gleichgestellt werden. Dies gelte auch für die Dozenten des Protestantisch-Theologischen Instituts. Das Landeskonsistorium sah darin eine zusätzliche Motivation, die Pfarrer zum Bleiben zu bewegen, die Pfarrer werden konkret gebeten, die „Evangelische Kirche A.B. nicht vorschnell zu verlassen."[22] Diese „Grundsatzerklärung" der Kirchenleitung wurde auch in der ersten Ausgabe der *Landeskirchlichen Information* hervorgehoben[23].

   In der zweiten Jahreshälfte 1990 wurden ähnliche Verhandlungen mit der Evangelischen Kirche A.B. in Österreich geführt (Juni und Oktober). Als Ergebnis wurde in der Sitzung des Landeskonsistoriums vom 7. Dezember eine Vorlage zur Vereinbarung vorgestellt, in der geregelt wird, unter welchen Bedingungen Pfarrer der Evangelische Kirche A.B. aus Rumänien übernommen werden. Anders als im Falle der Evangelische Kirche in Deutschland, wurden von der Schwesterkirche in Österreich einige Bedingungen für die Übernahme gestellt: Die Pfarrer sollen nach Ablegung der Pfarramtsprüfung wenigstens fünf Jahre im Dienst der Kirche gestanden haben und nicht älter als 35 Jahre alt sein. Zudem soll die Übernahme nur dann erfolgen, wenn mit dem Landeskonsistorium Einvernehmen erzielt worden ist. Die schriftliche Entlastung war eine Voraussetzung für die Aufnahme in den Dienst in Österreich. Auch das Landeskonsistorium knüpft die Freistellung der Pfarrer an gewisse Bedingungen: Geistliche können übernommen werden, wenn sie über den Jahreswechsel 1990/1991 hinaus der Evangelischen Kirche A.B. in Rumänien dienen, wenn die zuständigen Bezirkskonsistorien die Pfarrer für die Freistellung empfehlen und wenn das Landeskonsistorium feststellt, dass die Lage in der Gemeinde eine Freistellung erlaubt. Eine Entlastung erfolgte nur, wenn der Pfarrer sein Amt in Ordnung übergeben, und die Kanzlei- und Archivbestände an den „vom Bezirkskonsistorium bezeichneten Ort überführt hat.[24]

3.2. Neue Kirchenordnung

Die Notwendigkeit einer neuen Kirchenordnung wurde in der Landeskirche schnell erkannt. Schon am 12. Januar wurden die Bezirkskonsistorien und -dekanate in einem Rundschreiben[25] aufgefordert, diesbezüglich Stellungnahmen zu formulieren. Die Grundlage für solche Überlegungen bildeten weniger die Furcht, dass die Kirche durch die Auswanderung grundsätzliche Änderungen durchlaufen werde, als der neue Freiraum des kirchlichen Lebens, der sich nach

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22   Zitiert aus dem Text der Vorlage der Übereinkunft zwischen der Evangelischen Kirche A.B. in Rumänien und der Evangelischen Kirche in Deutschland.
23   Siehe *Landeskirchliche Information*, (1/1990).
24   Vgl. die Vorlage der Vereinbarung zwischen der Evangelischen Kirche A.B. in Rumänien und der Evangelischen Kirche A.B. Österreich.
25   ZAERK Rundschreiben Z. 60-V/1990.

dem Sturz des Diktators aufgetan hat. Auf der ersten Sitzung des Landeskonsistoriums, am 23. Januar 1990 wurde jedoch der Termin für die Stellungnahmen auf Antrag des damaligen Bischofsvikars Christoph Klein verlängert[26]. Diesen Schritt begründete er damit, dass zu jenem Zeitpunkt noch nicht abzusehen war, wie hoch die Zahl der Auswanderer sein wird und wie schwer dadurch die kirchlichen Strukturen betroffen werden.

Im Protokoll der Sitzung des Landeskonsistoriums vom 23. Januar 1990 lesen wir die Überlegungen des Hermannstädter Stadtpfarrers Wolfgang Rehner bezüglich einer Wiedervereinigung mit der Synodal-Presbyterialen Evangelischen Kirche A.B. Rehner vertrat die Meinung, dass „die meisten der deutschsprachigen Bewohner Rumäniens nicht mehr bereit sind, den ihnen in der Heimat zustehenden Platz auszufüllen und am Aufbau des Landes mitzuhelfen."[27] Die Kirche werde infolge der Auswanderung auf eine kleine Zahl – zum Teil in Mischehen lebenden, oder aus Mischehen hervorgegangenen – Gemeindeglieder schrumpfen. Diese Idee traf bei Vielen nicht auf Zustimmung, so meinte zum Beispiel Pfarrer dr. Gerhard Schullerus, dass man erst abwarten soll, wie viele Mitglieder die Kirche verlieren wird, um keine „voreiligen Schritte auf eine Wiedervereinigung mit der Schwesterkirche" zu unternehmen.[28]

Die Änderung der Kirchenordnung wurde einige Monate später, bei der Sitzung des Landeskonsistoriums am 12. Juli 1990 erneut angesprochen. In jener Sitzung präsentierte der im Mai gewählte neue Bischof Christoph Klein seine Erwägungen über die zukünftigen Aufgaben der Kirche. Durch die plötzliche und schnelle Schrumpfung der Gemeinden müsse sich die Kirche auf eine Diasporasituation einstellen und sich vom bisherigen „volkskirchlichen Denken" lösen. Diese neue Lage würde sich deprimierend und lähmend auswirken, die Umstellung brauche viel Aufwand an Arbeit, schreibt der Bischof in seinen Ausführungen. In seinem Schreiben bezieht er sich konkret auf die Schaffung neuer Rechtsstrukturen. Als neuer Termin für die Fertigstellung eines Entwurfes für die neue Kirchenordnung nannte der Bischof den Herbst 1990 – die eingesehenen Protokolle und Dokumente aus dem Jahr 1990 enthielten jedoch keine weiteren Angaben über den Stand der Arbeit an dieser neuen Kirchenordnung.

Anpassungsbedarf bestand auch in Hinblick auf die Ergänzung der kirchlichen Körperschaften. Die Mitgliederzahlen der Presbyterien, der Gemeindevertretungen, die Zahl der Delegierten für die Bezirkskirchenversammlungen wurden aufgrund von Zahlen festgelegt, die überholt waren und sich fast täglich änderten. Die Kanzlei präsentierte in ihrem Bericht auf der Sitzung des Landeskonsistori-

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26   Siehe dazu ZAERK Bestand Z. 237-V/1990, Verhandlungsbericht über die Sitzung des 28. Landeskonsistoriums vom 23. Januar 1990.

27   ZAERK Bestand Z. 237-V/1990, Verhandlungsbericht über die Sitzung des 28. Landeskonsistoriums vom 23. Januar 1990, S. 3

28   ZAERK, Bestand Z. 237-V/1990, Verhandlungsbericht über die Sitzung des 28. Landeskonsistoriums vom 23. Januar 1990, S. 4.

ums am 12. Juli einen Erlass[29], in dem darauf hingewiesen wurde, dass viele Stellen im Zuge der Auswanderung vakant geworden sind. Angesichts der bevorstehenden Bezirkskirchenversammlungen und der 56. Landeskirchenversammlung mussten die Neubesetzungen bis Anfang September 1990 erfolgen. Dabei musste die schwindende Seelenzahl beachtet werden, um festzustellen, durch wie viele Mitglieder die Presbyterien und Gemeindevertretungen ergänzt werden müssen. Im Falle der Gemeinden, deren kirchliche Körperschaften nicht mehr ergänzt werden konnten, musste ein Kirchenrat gebildet werden.[30] Es muss wiederholt unterstrichen werden, dass zu diesem Zeitpunkt die Kirchenordnung noch nicht an die tatsächliche Zahl der verbliebenen Kirchenglieder angepasst wurde. Für die anstehende Nachbesetzung der Körperschaften galten die alten Regelungen, die grundsätzlich von einer Seelenzahl von mindestens 500 ausgegangen waren.

3.3. Sicherstellung des kirchlichen Kultur- und Archivgutes

Ein immer dringenderes Problem bedeutete die Sicherstellung des Kultur- und Archivgutes der Evangelischen Kirche A.B. Eng mit dieser Problematik verbunden ist auch der Prozess zur Absprache des Rechts auf Selbstverwaltung von Gemeinden. Das Landeskonsistorium wurde 1974 von der 50. Landeskirchenversammlung ermächtigt, Gemeinden, die „ihrer geringen Seelenzahl wegen nicht mehr fähig sind, ihr unbewegliches und bewegliches Vermögen selber verantwortlich zu verwalten"[31], das Recht auf Selbstverwaltung des Vermögens abzusprechen. Dadurch gingen die Vermögens- und Finanzverwaltung, sowie die Sorge für das Archiv und für die Kanzlei auf das zuständige Bezirkskonsistorium über. In der Sitzung des Landeskonsistoriums vom 7. Dezember 1990 gab es mehrere Anträge in diesem Sinne: betroffen waren die Gemeinden Batiz, Bussd, Detta, Engelsbrunn und Moritzfeld im Bezirkskonsistorium Mühlbach und Halvelagen, Klosdorf und Wolkendorf im Bezirkskonsistorium Schäßburg. Als Beispiel aus den Dokumenten sollen hier Details zum Prozess der Auflösung der Gemeinde Engelsbrunn stehen:

> *Unterfertigtes Presbyterium der Evangelischen Kirchengemeinde A.B. in Semlak teilt hiermit dem Hochlöblichen Landeskonsistorium mit, daß die Seelenzahl der Evangelischen Tochtergemeinde in Engelsbrunn durch die Auswanderung der Gemeindeglieder plötzlich so sehr gesunken ist, daß*

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29 ZAERK, LKZ 1346.V/1990, erarbeitet von den Bezirksdechanten und den Mitgliedern des geistlichen Ausschusses

30 Laut dem Erlass betreffend die Zahl der Körperschaften, Z. 1619-V/1989, bestanden die Kirchenräte in Gemeinden, in denen die Seelenzahl über 150 lag aus 5-7 Mitgliedern, bei einer Seelenzahl zwischen 50-150 aus 3-5 Mitgliedern und bei einer Seelenzahl unter 50 aus 1-3 Mitgliedern.

31 Siehe dazu u.a. ZAERK Z. 2186-V/1990, Bericht der Kanzlei des Landeskonsistoriums in der Sitzung am 7. Dezember 1990.

die Gemeinde sich nicht mehr selbst verwalten kann (zur Zeit sind es nur noch 10 Gemeindeglieder, von denen 4 auswärts wohnen)[32]

Über das Schreiben des Semlaker Presbyteriums wurde in der Sitzung des Bezirkskonsistoriums Mühlbach am 18. September 1990 beraten und das Anliegen dem Landeskonsistorium vorgelegt.[33] Wie bereits erwähnt, wurde in der Sitzung vom 7. Dezember über die Angelegenheit beraten und dem Mühlbacher Bezirkskonsistorium die beschlossenen Verfügungen im Schreiben 2040-V/1990 mitgeteilt: Kanzlei und Archiv der Gemeinde sollten nach Mühlbach überführt werden, das unbewegliche und bewegliche Vermögen der Gemeinde veräußert werden. Der Erlös sollte dem Landeskonsistorium zukommen. Die Gläubigen wurden der Gemeinde Semlak eingegliedert.

Die außerordentliche Wichtigkeit der Sicherung von Archiv- und Kulturgütern wurde von vielen Geistlichen früh erkannt und immer wieder angesprochen. Der Vorsitzende des Ausschusses für das Nationale Kulturgut, der Heltauer Pfarrer dr. Gerhard Schullerus präsentierte bereits in der Sitzung des Landeskonsistoriums vom 22. August 1990 eine Vorlage zur Sammlung, Aufbewahrung uns Sicherstellung des kirchlichen Kultur- und Archivgutes.[34] Das Thema der Archivsicherung kam jedoch in den Sitzungen des Landeskonsistorium im Jahr 1990 nicht weiter zur Sprache.

3.4. Diakonieaufgaben der evangelischen Kirche

Die Frage nach der Errichtung eines Altenheimes wird erstmals in der Sitzung des Landeskonsistoriums vom 6. März aufgeworfen – der Vorschlag des Kulturreferenten dr. Hermann Fabini sah vor, dass aus Mitteln der Ruhegehalts- und Unterstützungskasse ein Altenheim errichtet werden soll[35]. Daraufhin beantragte der Ausschuss, dass das Landeskonsistorium das Anwesen in Michelsberg Nr. 10 erwerben soll, um ein Heim einzurichten, in dem „ältere Gemeindeglieder, die nicht pflegebedürftig sind, zeitweilig oder auf Dauer Unterkunft und Verpflegung finden können."[36]

Auf der folgenden Sitzung des Landeskonsistoriums (4. Mai 1990), kam die Kirchenleitung auf die Frage zurück. Auf Vorschlag des Bischofsvikars Dr. Christoph

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32 ZAERK, Z. 29/1990, vom 20. Juli 1990, Zitat aus dem Schreiben des Presbyteriums in Semlak an das Bezirkskonsistorium Mühlbach.
33 Ebenda.
34 Siehe dazu ZAERK, Z. 1864-V/1990: XVIII Verhandlungsbericht über die Sitzung des 28. Landeskonsistoriums vom 22. August 1990.
35 ZAERK, Z. 520-V71990: VB über die Sitzung des 28. Landeskonsistoriums vom 6. März 1990, S. 9.
36 ZAERK, Z. 819-V/1990: VB über die Sitzung des 28. Landeskonsistoriums vom 4. Mai 1990, S 13.

Klein ernannte das Landeskonsistorium in dieser Sitzung einen Ausschuss, der die Frage betreffend die Errichtung eines größeren Altenheimes prüfen sollte.[37]

Fast jede kommende Sitzung des Gremiums befasste sich mit dem Thema der Altenheime. Nach dem ersten Vorschlag zur Gründung eines Heimes in Hermannstadt wurde bereits auf der Sitzung im Juni der Wunsch eingebracht, auch in Kronstadt ein Pflegeheim zu errichten. In der Junisitzung wurde der Errichtung eines Altenheimes grundsätzlich zugestimmt, jedoch herausgehoben, dass die Kirche selbst keine Mittel „aufgrund der finanziellen und personellen Armut"[38] habe. Die Gründung eines Heimes wurde demnach an die Bedingung geknüpft, dass das Diakonische Werk der EKD die Mittel für den Aufbau und die Einrichtung zur Verfügung stellt – so beschloss das Landeskonsistorium die Errichtung des Altenheims als eine Anstalt der Ruhegehalts- und Unterstützungskasse der Evangelischen Kirche A.B. Hierbei ging es um eine Einrichtung in Hermannstadt.

Auf die Errichtung eines Altenheimes in Kronstadt wurde in der Sitzung des Landeskonsistoriums vom 1. August 1990 eingegangen: Stadtpfarrer Mathias Pelger trug den Vorschlag des Kronstädter Presbyteriums vor, demnach das Heim vom Landeskonsistorium patroniert werden soll, damit Bewerber und Altenpfleger aus dem ganzen Bereich der Landeskirche aufgenommen und angestellt werden können. Aus dem Sitzungsprotokoll geht hervor, dass es bei der Umsetzung der Pläne Schwierigkeiten gab. Die Einrichtung des Heimes in Hermannstadt stagnierte, weil die Mittel von der Evangelischen Kirche in Deutschland nicht zugesagt wurden, die Projektanfertigung wurde ebenfalls nicht in Auftrag gegeben. Um „noch vor Anbruch der kalten Jahreszeit eine Unterkunft für bedürftige Gemeindeglieder in fortgeschrittenem Alter"[39] in Kronstadt bereitstellen zu können, wurde auf Antrag des Hermannstädter Stadtpfarrers Wolfgang Rehner schließlich beschlossen, dass das Landeskonsistorium die Honterusgemeinde bei der Verwirklichung des geplanten Altenheimes unterstützen wird, beim Diakonischen Werk der Evangelischen Kirche in Deutschland um die erforderlichen Mittel anfragen wird, „das Altenheim in Kronstadt aber nicht selber errichten und verwalten" wird.[40]

Wenige Wochen später, auf der Sitzung des Landeskonsistoriums vom 22. August wurde ein weiterer Schritt zur Errichtung eines Altenheimes getan: das Landeskonsistorium hat die Architekten Hermann Fabini und Martin Rehm beauftragt, einen Entwurf und eine Kostenberechnung für das Hermannstädter Heim zu erstellen, der Auftrag für die Durchführung des Baus werde zu einem späteren Zeitpunkt gesondert erteilt werden.

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37   Ebenda.
38   ZAERK, Z. 1302-V/1990: VB über die Sitzung des 28. LK vom 12. Juni 1990, S.5.
39   ZAERK, Z. 1596-V/1990, VB über die Sitzung des 28. LK vom 1. August 1990, S.3
40   Ebenda.

Das Pfarrhaus in Schweischer wurde in der zweiten Hälfte des Jahres 1990 zu einem Altenwohnheim umgebaut.[41] Das Landeskonsistorium hat auf Antrag der Kanzlei beschlossen, die Institutionalisierung des Heimes zu überprüfen, und falls möglich, der Übernahme in die Verwaltung der Ruhegehalts- und Unterstützungskasse des Bezirkskonsistoriums Kronstadt zuzustimmen.[42]

4. Endzeitstimmung? – Der öffentliche Umgang mit dem Thema Auswanderung

Die Haltung der Kirche wird in dieser Zeit von zwei Aspekten dominiert: zum einen hat sie mit allen Mitteln versucht, die Stellung zu halten; zum anderen war sie bemüht, sich auf die neue Situation einzustellen. Es soll an dieser Stelle versucht werden, die öffentliche Position der evangelischen Kirche zum Thema Auswanderung im Laufe des Jahres 1990 anhand der kirchlichen Publikationen darzustellen. Bis Oktober 1990 können nur die Ausgaben der *Kirchlichen Blätter* als Quelle dienen, da die *Landeskirchliche Information* erst im Oktober 1990 erschienen ist.

Liest man die ausgewählten Passagen aus den Artikeln, die im Laufe des Jahres 1990 erscheinen sind, fällt die starke emotionale Ladung der verfassten Schriften, die Fluktuation der Stimmung zwischen Zuversicht und Verzweiflung, Hoffnung und Enttäuschung auf.

Zweifellos konnte und wollte man dem Thema Auswanderung in den Publikationen nicht ausweichen. Welche Position die evangelische Kirche zum Thema eingenommen hat, zeigt ein Artikel aus der Februarausgabe der *Kirchlichen Blätter*, aus Anlass des bereits erwähnten Genscher-Besuches:

> *Bedingt durch die unmenschlichen Verhältnisse und den totalen wirtschaftlichen Niedergang in der Zeit der Diktatur hat ein großer Teil der Siebenbürger Sachsen den Entschluß gefaßt, Rumänien zu verlassen und in die Bundesrepublik auszuwandern. Die Kirche hat weder zum Bleiben noch zum Gehen Parolen gegeben, sondern ihre Mitglieder gebeten, den diesbezüglichen Entschluß in der Verantwortung vor Gott zu fassen. Die Kirche selbst ist zum Dienst an ihren Gliedern gerufen und wandert nicht aus; sie bittet auch ihre Pfarrer zu bleiben und den Gemeinden beizustehen, deren Lage nun leichter, deren Arbeit reicher werden könnte, wenn nicht eine überstürzte Auswanderung zu neuen schweren Belastungen führt.[43]*

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41 ZAERK, Z. 2186-V/1990, Bericht der Kanzlei des LK in der Sitzung am 7. Dezember 1990
42 ZAERK, Z. 2259-V/1990, I. Verhandlungsbericht des 29. LK vom 7. Dezember 1990, S. 14.
43 Hermann Pitters. 1990. *Kirchliche Blätter, Monatsschrift der evangelischen Kirche A.B. in Rumänien,* (18(2)):4.

Im Kontext des Genscher-Besuchs wird an die Mitglieder der evangelischen Kirche appelliert – man wird kaum wieder eine so direkte Aufforderung finden, die zur Bewahrung der jahrhundertelangen siebenbürgisch-sächsischen Identität und zur Gestaltung einer Zukunft in der Heimat ermahnt:

> *Auswanderungswillige finden eine offene Tür in Deutschland: eine Tür, die offen bleiben wird. Es muß also keine Panik ausbrechen. [...] Die Tore stehen aber auch offen für das, was die meisten in den bangen und schweren Jahren der Nachkriegszeit und in der finsteren Zeit der Diktatur kaum zu hoffen wagten. Wenn wir es wollen, können wir für unsere Gemeinschaft eine neue Zukunft aufbauen. Eine siebenbürgisch-sächsische Identität hier in Jahrhunderten in Sprache, Sitte und evangelischem Glauben gewachsen, kann erhalten bleiben, und zwar nur hier.*[44]

Die ersten Wochen des Jahres 1990 standen im Zeichen des Enthusiasmus und der Hoffnung. Dennoch formulierten die meisten Autoren eher vorsichtig, da die Zukunft auch nach der Wende im Dunkeln liege – schrieb zum Beispiel der Dekan des Theologischen Instituts Hermann Pitters auf der ersten Seite der *Kirchlichen Blätter* in der Jahreslosung. Die dunkle Vergangenheit habe das Kirchenvolk jahrzehntelang gefährdet, Familien und Gemeinden seien zerrissen, durch die Auswanderung zahlenmäßig geschrumpft und um ihre materielle Basis gebracht worden. Ob die kommende Zeit „lichtvoll" sein wird, hänge auch von der Bereitschaft ab, in der Gemeinschaft der Kirche zu leben.

Die Auseinandersetzung der Kirchenführung mit der Schuldfrage wurde bereits angesprochen. Die öffentliche Thematisierung erfolgte auch sehr früh. Bischof Albert Klein sprach das Thema im *Kanzelwort zum Christfest* an:

> *Wir sind betroffen über unsre eigene Schuld, Unrecht bisher nicht genug beim Namen genannt zu haben; über den verantwortungslosen Gebrauch der Macht und das zugefügte Unrecht; über ungezählte Tote und Trauernde.*[45]

Die Frage der Aussiedlung und die nach der Neuausrichtung der evangelischen Kirche in der sich abzeichnenden Situation lassen sich in den Ausgaben der *Kirchlichen Blätter* das ganze Jahr über verfolgen. Bereits Anfang des Jahres, als die flutartige Auswanderungswelle noch nicht Wirklichkeit geworden ist, wurden Zweifel formuliert. Zeichen gab es genug, auch aus den veröffentlichten Artikeln geht hervor, dass damit gerechnet wurde, dass sehr viele ihre neu gewonnene Freiheit dafür nutzen werden, auszuwandern. Dazu passt das folgende Zitat aus einem Beitrag von D. Dr. Christoph Klein:

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44   Hermann Pitters. 1990. *Kirchliche Blätter*, (18(2)):4.
45   Albert Klein. 1990. Kanzelwort zum Christfest, *Kirchliche Blätter*, (18(1)):3.

Wir werden uns auch fragen müssen, ob wir dieses Land als Heimat bereits
aufgegeben haben, oder ob wir es als solche neu gewinnen wollen? Sind
wir bereit, auf Gott zu hören, und darauf zu warten, was er uns – auch uns
Sachsen – mit diesen wunderbaren Geschehnissen sagen will, um so unse-
re Entscheidungen zu treffen? [46]

Während der spätere Bischof Christoph Klein seine Worte an die Kirchen-
mitglieder richtet, appelliert der Kronstädter Stadtpfarrer Mathias Pelger an die
„Pfarrbrüder des Kronstädter Bezirks", und bittet „alle Brüder, die um einen Paß
zur Auswanderung angesucht oder die Absicht haben, es früher oder später zu
tun", diese Entscheidung noch einmal zu überdenken.[47] Der Artikel in Form ei-
nes Briefes ist in der Ausgabe 2/1990 der *Kirchlichen Blätter* erschienen, ist aber
mit dem 26. Dezember 1989 datiert, und belegt damit die Vermutung, dass damit
zu rechnen war, dass mit der Öffnung der Grenzen sehr viele Deutsche das Land
zu verlassen gedenken.

Zu diesem Zeitpunkt deutete sich der Exodus der evangelischen Sachsen an. So
schreibt in der gleichen Ausgabe der Zeitschrift Berthold W. Köber, dass anstelle
der weihnachtlichen Freude Panik und Angst getreten sei: „Nicht in unseren Kir-
chen drängen sich unsere Leute... Nicht Gott wird gesucht... Unser Kirchenvolk
hat die Hoffnung auf ein neues Leben im Land unserer Väter aufgegeben!"[48]

Die Auswanderung, die Familienzusammenführung, sowie die möglichen Aus-
wege aus der sich anbahnende Krise die Kirche wurden schon beim ersten Pfar-
rertag nach einer fünfzigjährigen Pause, im März 1990, angesprochen. Die Freiheit
habe die latente Krisensituation der Kirche verstärkt und sichtbar gemacht. „Das
fluchtartige Verlassen der Heimat" brächte viele Gemeinden „an den Rand ihres
weiteren Bestandes und eine Stabilisierung ist bisnoch […] nicht abzusehen." –
schreibt Hermann Pitters in seinem ausführlichen Bericht über diese Tagung.

Die Neuorientierung der evangelischen Kirche in Rumänien nahm bis Mitte
des Jahres 1990 allmählich Gestalt an. Dazu hat auch die Wahl von Christoph
Klein zum Bischof beigetragen. Die Landeskirchenversammlung wählte ihn am
13. Mai 1990 zum Nachfolger des in Februar verstorbenen Albert Klein. Der neue
Bischof sah die Lage sehr nüchtern, wissend, dass die Kirche, die

eine Kirche des Volkes und eine Kirche der Ordnungen war, wird sich, was
ihre Größe, ihre Gestalt und auch ihre Aufgaben anbelangt, in der nächs-
ten Zeit schon sehr verändern und ein anderes Gesicht bekommen. Viele
liebgewordene Einrichtungen werden zusammenbrechen, manche einsti-

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46   Christoph Klein. 1990. Die Zeit ist erfüllt, *Kirchliche Blätter*, (18(1)):6.
47   Mathias Pelger. 1990. Bitte an die Pfarrbrüder des Kronstädter Bezirks. *Kirchliche Blätter*,
      (18(2)):5.
48   Berthold W. Köber. 1990. Kein Vertrauen mehr. *Kirchliche Blätter*, (18(2)):7.

ge Möglichkeiten aufhören, und eine Reihe von Vorstellungen über Wesen und Dienst der Kirche sich wandeln.[49]

In der zweiten Jahreshälfte kristallisierte sich die Lage allmählich aus. Der Diskurs in der Publikation wurde zuversichtlicher, auch wenn oft die noch nie dagewesene, besonders schwere Situation thematisiert wurde. Immer wieder wurden Möglichkeiten der Neuorientierung für eine Kirche im Umbruch gesucht. So heißt auch ein Artikel in der Ausgabe 9/1990 der *Kirchlichen Blätter*, in der Dietmar Pleier schreibt: „Wir versuchen uns keine Illusionen zu machen, sondern die Lage so zu sehen, wie sie ist."[50]

Ebenfalls positive Töne schlägt auch der Artikel von Pfarrer Hans Klein in der Septemberausgabe der Zeitung an: „Wir sind doch mehr, als viele befürchtet haben." Vorerst fände man „Menschen für unsere Büros, zur Hilfe für die verschiedenen Aktionen, in die Körperschaften". Die Zahl der Gemeindeglieder sei aber drastisch geschrumpft:

> *Wir wissen es und sehen es überall. Besonders schmerzlich ist es in einigen Gemeinden zu spüren. Wir erfahren es immer neu: wir sind nicht nur weniger geworden, wir sind WENIGE.*[51]

Eine ähnlich nüchterne, aber zuversichtliche Bilanz zieht der Schriftleiter Hermann Pitters im Leitartikel der Dezemberausgabe:

> *Unter uns ereignete sich ein elementarer Aufbruch von Menschen. Über die Hälfte derer, mit denen wird vor einem Jahr das Christfest feierten, vor allem die Jugend, die jungen Familien mit Kindern, und mit ihnen auch viele Alte, sind nach Deutschland gezogen.*[52]

Betrachten wir nun auch die ersten Ausgaben der anderen kirchlichen Publikation. Als Teil der Identitätssuche und der Kontaktsuche zu den Gläubigen, die die Heimat nicht verlassen haben, kann die 1990 neu gegründete Halbmonatsschrift *Landeskirchliche Information* betrachtet werden. Die Entscheidung, ein Informationsblatt herauszugeben, wurde auf der Sitzung des Landeskonsistoriums am 22. August 1990 beschlossen.[53] Das „Amtliche Informationsblatt des Landeskonsistoriums" wurde vom Bischof Christoph Klein vorgeschlagen, es sollte „Informationen aus dem Leben der Kirche, der Arbeit des Landeskonsisto-

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49   Dankesrede des neugewählten Bischofs dr. Christoph Klein, *Kirchliche Blätter*, (18(5)):5.
50   Dietmar Plejer. 1990. Orientierung für eine Kirche im Umbruch, *Kirchliche Blätter*, (18(9)):1.
51   Hans Klein. 1990. Hilfe für die Wenigen, *Kirchliche Blätter*, (18(9)):3.
52   Hermann Pitters. 1990. Freudenfest in dunkler Zeit. *Kirchliche Blätter*, (18(12)):1.
53   ZAERK, Z. 1864-V/1990, VB über die Sitzung des 28. LK vom 22. August 1990, S. 2

riums und der Ausschüsse, sowie der Tätigkeit des Bischofsamtes"[54] enthalten, zudem die Mitteilungen, Rundschreiben, Stellenausschreibungen usw. bringen.

Bei der Betrachtung der *Landeskirchlichen Information* stellt sich unweigerlich die Frage, warum es die Kirche für wichtig ersah, ein Informationsblatt herauszugeben, als bereits der Großteil der Gläubigen die Heimat verlassen hat. Die *LKI* erscheint ab Oktober 1990 zweimal monatlich: Ziel der *Landeskirchlichen Information* sei, ein Bild von den repräsentativen und typischen Geschehnissen in der evangelischen Kirche zu entwerfen. Dabei gehe es nicht nur um Information, sondern auch um Formation: der Blick soll auch auf das gelenkt werden, was wird, schrieb Eginald Schlattner, der mit der Redaktion der Publikation beauftragte Rothberger Pfarrer. Im Gegensatz zu den *Kirchlichen Blättern* sah die *Landeskirchliche Information* nicht wie eine klassische Zeitung aus, es handelte sich um mit Schreibmaschine getippten A4 Blätter.

Auf den ersten Seiten der ersten *LKI*-Ausgabe versucht der amtierende evangelische Bischof Christoph Klein die Frage zu beantworten, wie sich die Kirche in der völlig neuen Situation positionieren könne:

> Es kann als Hoffnungszeichen verstanden werden, daß nicht „das Ende" wartet, sondern sich Neues anbahnt. Es ist dieses vor allem Hinweis darauf, daß man bei uns nicht mit Passivität und Resignation auf die neue Situation reagiert, sondern daß die Kirche dieses als eine Herausforderung, als Aufgabe ansieht, als geistliches Problem, als uns aufgetragenes Amt versteht.[55]

Eine Begründung für die Erscheinung der *LKI* gibt Bischof Klein ebenfalls in der ersten Ausgabe: Die Neuformierung der Kirche sei das Gebot der Stunde. Ein Informationsblatt könne im Aufzeigen neuer Formen und Ordnungen einen wichtigen Dienst leisten, und werde helfen, Perspektiven für die Arbeit in der Kirche zu erkennen[56].

Die Aussagen der Beiträge aus der *Landeskirchlichen Information* klingen ähnlich, wie die bereits angeführten Feststellungen: Es wird die überaus ernste Lage der Kirche nach der massiven Aussiedlung der Gemeindemitglieder und der Pfarrer beschrieben, doch die Schlussfolgerungen fallen größtenteils positiv aus, es geht weiter, es gibt Hoffnung für die Zukunft. Dazu als Beispiel die Predigt beim Festgottesdienst der 56. Landeskirchenversammlung in der Stadtpfarrkirche in Hermannstadt, abgedruckt in der zweiten Ausgabe der *LKI*: Angesichts der Zahlen müsste man „unweigerlich zum Schluß kommen, daß das Ende nah ist", so Bischof Klein. Die Predigt endet jedoch mit Zuversicht, denn:

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54   Ebenda.
55   Christoph Klein. 1990. *Landeskirchliche Information*, (1(1)):2f
56   Ebenda.

> *Das Wunder Gottes ist, wenn etwas neu entsteht. Wunderbar ist, […] was wir als Erfüllung unseres Lebens erfahren; und das auch in einer kleiner gewordenen Familie, das auch in der Diasporakirche, wo die Gemeinden verstreut sind, und wo der Dienst und die Betreuung schwerer werden, wo es mühsam und hart sein wird, in dieser Begegnung mit Gott auch die anderen Menschen zu finden.*[57]

Ähnlich klingt auch der Beitrag aus der Nummer 6/1990, vom 31. Dezember, in dem wieder einmal betont wird, dass es noch Gläubige und Pfarrer gibt, die das Schicksal der Gemeinde vor den eigenen Interessen stellen können:

> *Das verflossene Jahr hat erwiesen, daß auch in der radikal veränderten Situation – entstanden durch die fluchtartige Massenauswanderung der Gemeindeglieder –, Menschen unserer Kirche bereit sind, sich in den Dienst der Nächstenliebe und der Verkündigung zu stellen.*[58]

Einer von den oben erwähnten jungen Pfarrern ist heute der Bischof der evangelischen Kirche A.B. in Rumänien, Reinhard Guib, aus dessen (für das Ordinationsgespräch vorgelegten) Schreiben zitiert wird: „... Gerade in dieser wirren Zeit und völkischen Notsituation ist es in unseren Kirchengemeinden das Verlangen aller – der Unschlüssigen, Ratlosen und Hoffnungslosen, aber auch der Zufriedenen und Beständigen, der Ausreisenden wie auch Dableibenden – zu spüren, schöne und viele Gottesdienste zu feiern, sich an gottesdienstlichen Handlungen und Veranstaltungen in weit größerem Maße zu beteiligen."

5. Schlussfolgerungen

Das Jahr 1990 zeigt eine evangelische Kirche in Siebenbürgen, die Orientierung sucht, dies aber meist in konstruktiver Weise thematisiert. Eine Kirche, die sich der Herausforderungen, dem Umbruch, den die Ausreisewelle nach sich zog, stellen will. Es kann aufgezeigt werden, dass die Themen, mit denen sich die Kirchenleitung in ihren Sitzungen beschäftigte, auch im Diskurs der Kirche nach Außen, in ihren Publikationen zu finden sind. Zwar haben die Vertreter der Kirche meistens nur auf die Ereignisse reagiert, doch die Kirche war sichtlich bemüht, ihre Strukturen den neuen Herausforderungen anzupassen, weil die Ausreisewelle doch antizipiert worden war. Das Thema der Auswanderung war sowohl in den Sitzungen der Kirchenführung, als auch in den Publikationen

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57 Christoph Klein. 1990. Predigt am 19. Sonntag nach Trinitatis (21. Oktober 1990), *Landeskirchliche Information*, (1(2)):7
58 *Landeskirchliche Information*, (1(6)):2.

allgegenwärtig. Auch die Schuldfrage, „Unrecht bisher nicht genug beim Namen genannt zu haben"; wurde öffentlich angesprochen, weniger jedoch die Maßnahmen aus den 70er und 80er Jahren, die das Ziel hatten, Pfarrer, Theologiestudenten und die Angestellten der Kirche an der Ausreise zu hindern.

Zum Abschluss kann definitiv festgestellt werden, dass es in der evangelischen Kirche keine Endzeitstimmung herrschte; selbst wenn die Situation düster war, haben die Verantwortlichen ständig nach Auswegen gesucht, um die Strukturen aufrecht erhalten zu können.

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Book Reviews

Roy Youdale: Using Computers in the Translation of Literary Style: Challenges and Opportunities

Routledge, 2020, 259 pp.

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Traditionally, literary translation and computer tools never met on common ground, with literary translators hardly displaying willingness to engage in technical aspects of translation. The scholarly literature is in this respect fairly consistent, observing that literary translators seldom or never resort to CAT tools (Slessor 2019; Ruffo, 2018, 2020, etc.). Despite reluctance to technology still persisting with literary translators, as of the last few years, the issue has gained increasing attention, and scientific events in translation organized by the most reputed translation associations worldwide have dedicated sections to it (e.g. EST, IATIS, etc.); or even events such as the Computer-Assisted Literary Translation (CALT) workshops in Swansea, the Literary Machine Translation workshop in Dublin, etc.

Translation Studies (TS) has particularly become acquainted with the use of electronic tools, especially since the 1990s, when Descriptive Translation Studies adopted the Corpus Linguistics methodology to foster TS. This marked the advent of a new and highly fruitful study area, that of the Corpus-Based Translation Studies (CBTS). The number of studies in this area has been soaring around the world, benefiting both the theoretical and the applied facets of TS due to the use of electronic tools to analyse reliable data retrieved from sizable computer-stored corpora. Among the wide range of research topics pertaining to CBTS, corpus-based investigations of style have been constantly undertaken based on translations employing diverse language pairs (e.g. Baker 2000, Boase-Beier 2011, Hyde-Parker 2008, Kenny–Winters 2020, Rothwell 2018, Saldanha 2011, Toral 2014, etc.).

Roy Youdale's *Using Computers in the Translation of Literary Style: Challenges and Opportunities* proposes a novel technique for the investigation of the literary style, which improves literary translation and offers a new research methodology

to be further explored and completed. The method combines close and distant reading (Moretti 2013) applied to the translation of literary texts, and it is based on "creative reverse engineering" (p. 5), in a three-step approach which encompasses (1) the observation of the effect of the text on the readership, (2) the identification of the means generating it, and (3) the attempt at recreating that effect in the TL version. Importantly, the use of computers in the process of literary translation is considered "a way which neither dilutes nor deskills the art of translation, but actually enhances it" (p. 1). In addition, as the author states, the method is superior to close reading alone in that it offers a better-informed translation from a stylistic point of view. By means of the quantitative analysis of large-scale and reliable data retrieved by the computer tools, the stylistic level can be more accurately pictured, as well as the language devices generating it.

The book is organized into six main chapters, two of which are theoretical in nature, and four are descriptive in applying the methodology to the author's own translation of the novel *Gracias por el Fuego* by Mario Benedetti (2014) from Spanish into English. Two appendices supporting the arguments can be accessed at the end of the book, one comprising research data and the other exhibiting extracts from the SLT and the author's own translation.

The study's preliminaries are section-wise introduced ahead of the main chapters: The first section offers a brief overview of scholarly contributions regarding style in translation to support the need for "stylistic awareness" to produce better translations; the second section discusses strengths and limitations of traditional methodologies, while highlighting features impossible to grasp by close reading unaided by computer tools; thirdly, Youdale expresses precisely what this innovative approach has to offer, and, finally, presents the case study. All these preliminary incursions into the topic lead the way to Chapter 1, *Using Computers in Literary Translation*, which envisages "the opening up of a wider debate about various ways in which computer technology could be productively incorporated […] without involving either deteriorating in quality of translation or translator deskilling" (p. 11). In support thereof, it offers examples of the use of CAT tools (CATMA, Sketch Engine, and Voyant Tools) and MT in literary translation, along with an applied account of CDR (close and distant reading). The chapter presents a historical account of translation technology (1.1) and subsequently considers the effects of these technologies upon human translation (1.2). Subchapter 1.3 refers to the CDR approach to the translation of style with the author's intention to perform "reverse engineering" (p. 5) by means of a computer-based analysis of the effects of the SLT upon the readership and recreating them in the TLT. A (provisional) four-stage CDR-related translation process is proposed herein for the application of CL (Corpus Linguistics) and text visualization tools along all the stages of translation.

The second chapter, titled *Analysing the Source Text: Structure and Style*, emerges by providing information about the author of the source text, the novel

itself, and its reception. The corpus summaries are provided by Sketch Engine and Voyant Tools, and the computerized quantitative data analysis is justified in contrast to close reading and is accompanied by an account of its relevance in translation. A section within this chapter addresses handy distant reading analysis methods based on user-friendly software tools, the results thereby obtained being subject to close reading with a view to identifying stylistic features of the SLT and enhancing the literary translator's work. The features set under the lens include lexical frequency and distribution, themes and features of the author's style, and structural features of the style, such as sentence length, vocabulary range, and register. Sections 3 and 4 of this chapter demonstrate the CDR application to two features of the text, namely title and characterization. The suitability of the wording in the title is the focus of the former section, while the latter feature entails the extraction of proper nouns to constitute a list of characters. This list serves for the analysis of individual characters, the relationships between literary heroes, and the discourse analysis of one character's speech. Finally, this section presents the use of network analysis and visualization to create a map of all the characters and their relationships and interactions.

CDR, Translation Theory and the Attempt to Create an 'English Bendetti' is the title of the third chapter, which accounts for the usefulness of the CDR approach to investigate the style of the SLT before engaging in its translation. Then, as the author explains, a foreignizing approach is adopted in translation as an ethical principle rather than as a set of linguistic strategies, with a view to obtaining stylistic equivalence in the TL. This relies on a combination of Nida's formal vs. dynamic equivalence principles (1964/2004) and on a stylistic analysis of Bendetti's previously translated texts. Narrowing down to the translation of *Gracias por el Fuego*, the author discusses the phenomenon of foreignization in relation to the choice of the text, the visibility of the translation through retention of cultural reference, and the reflection of SL dominant features of style in the translation. To check the validity of his approach, the author undertook a preliminary comparative stylistic investigation of previous translations form the same author.

The following four chapters are dedicated to *Applying the Methodology*, each of them thoroughly illustrating the concrete stages of the computer-assisted research applied to the corpus, with relevant examples and figures. The first part of the application, as presented in Chapter 4, employs the recursive use of CDR to investigate translation challenges stemming from three cultural elements present in the text, namely (i) culture-specific items proper; (ii) the use of different languages in the source text, including the target language; and (iii) the use of *usted* and its formal interpersonal register. The application also entails manual counting and automatic lexical searches achieved by means of CATMA (Computer-Aided Textual Markup and Analysis) and MS Word. Section 4.1 argues that the translation of CSIs benefits better from regarding them in

groups and taking account of their narrative and stylistic functions at a micro- and macro-textual level than from their individual analysis. The second section of this chapter discusses the stylistic and narrative functions (e.g. humour and portrayal) stemming from the use of different languages in *Gracias por el Fuego*, which fulfils several stylistic and narrative functions. It is suggested that such CSIs should remain untranslated and accompanied by glossaries where the context does not offer clues for their decoding.

In Chapter 5, punctuation is analysed in relation to sentence length as a contributor to narrative configuration and to stylistic effect. Short and long sentences are dedicated separate sections and assessed by means of the CDR approach. The main results of the electronic quantification of both long and short sentences in the entire novel and by chapter are presented in figures. These results led to considerations on the manner in which sentence length triggers various stylistic peculiarities and themes, which can be evaluated in terms of their possibly problematic transfer to the TL.

Part 3 of the methodology is dedicated to *Comparing Source Text and Draft Translation.* The chapter is grounded on the argument that the CDR approach can be applied not only to the investigation of the ST but also to compare it to the translation. The four sections address different criteria to compare the two texts by displaying them in a parallel corpus. The focus of the comparison lies on Benedetti's style and adopts the following methodological steps: applying the standard CDR analysis, comparing sentence length, repetitions, and function words. All this analysis highlighted necessary changes to the draft translation for the sake of consistency and in order to enhance the stylistic resemblance of SLT and TLT.

As the title of the last part of the methodological applications exposed in Chapter 7 announces, it discusses *The Auto-Analysis of Translator Style.* More particularly, the translator's unconscious linguistic patterns and the way they impact the translation are central in this part of the analysis. It employs recurrent features of translation, such as explicitation, simplification, and normalization, and attempts to assess whether domestication has been overused and whether the target language text complies with the nature of "normal" English language. In section 7.1, the translation of style in general and the translator's individual style in particular are investigated in six steps, which provide them with "a useful triangulatory dimension" (p. 188) impossible to derive exclusively from the analysis of TTs and offer information on mainly unconscious translation practices. The findings of the analysis exhibit a stylistic tendency to raise awareness of stylistic peculiarities and adapt the practice of translation accordingly. Section 7.2 accounts for the CDR-grounded assessment of how the stylistic auto-analysis impacts the manner of translating. The linguistic usage has been examined in four parallel corpora in three languages: English, Spanish, and Greek. Despite the

limitations to the findings, the author argues that this approach can be further developed into a methodology for the higher-precision analysis of the literary translators' unconscious stylistic habits. There are actually three methods suggested for this purpose, all of which rely on parallel corpora comprising SLT and the translator's own TLT, which can be processed by electronic tools.

The concluding chapter chiefly refers to the experience exposed in the previous chapters to shed light on the potential of the proposed methodology and to evaluate its strength and weaknesses. The evaluation criteria refer to: i) SLT analysis with a view to setting translation goals; ii) aiding the first draft translation; iii) comparing ST and draft translation; iv) auto-analysis of the translator's style. Realistically, Youdale points to inherent limitations of any new methodology, which, in this particular case, mainly relate to decontextualization and the relevance of quantitative data for the envisaged outcome, which requires sensible human judgement and intervention. Overall, Youdale concludes by expressing confidence in the potential of this emerging study area which is called Computer-Assisted Literary Translation (CALT). The argument supporting this belief is that "a combination of close and distant, or computer-assisted, reading can bring corpus-linguistic (CL) and text-visualisation tools and techniques to bear creatively and productively on the process of literary translation" (p. 216). What is more important here though is related to the advantages that this methodology offers and the promising development for the future. Indeed, such research is valuable also due to its potential to serve the further and dedicated development of CAT tools so as to create such tools that are helpful in literary translation. And it is literary translators, like Youdale himself, who are in a favourable position to evaluate the CAT tools during their practice. So far, there is probably no tool dedicated particularly to literary translation (the methodology herein resorted to three different software tools). Besides, referring to CDR, the main investigation method in this study, Youdale emphasizes that "the methodology only works because it combines both types of reading in a partnership of equals" (p. 222).

In the meantime, MT for literary translation is being heavily worked on, with quite promising results (Matusov 2019). But, by the time MT is able to satisfactorily (if ever) replace human translators, the advantages of CAT tools are obvious and do not affect the translator's voice and creativity. In addition, they can considerably contribute to the retention of the artistic content, the literariness of a work of literature – for, as it is widely acknowledged, dealing with style is of utmost importance in literary translation, being the imprint of any writer's literary personality. The development and adjustment of CAT tools for literary translation depend to a large extent on research such as Youdale's book offers. Thus, the methodology could be introduced, tested, and further developed in a collaborative endeavour and constructive dialogue among academics, researchers, and practitioners in translation studies.

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Julianna Lőrincz: *Kontrasztív nyelvészet, kontrasztív stilisztika* [Contrastive Linguistics, Contrastive Stylistics]

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The book of Julianna Lőrincz, *Kontrasztív nyelvészet, kontrasztív stilisztika* (Contrastive Linguistics, Contrastive Stylistics), discusses various theoretical issues of comparative linguistics research, including the most important theoretical and practical issues of translation as a field of contrastive linguistics, stylistics, and pragmatics with the help of which the act of translation encapsulating literary translation takes place.

As such, the book is divided into two major parts, and the first unit is dedicated to pure theory. Hence, it discusses linguistic issues grouped around the theme of linguistic diversity in the world, by presenting and processing relevant findings and research results from relevant and new literature sources. The main topics of the thirteen chapters are the following: language typology, origin-based classification of languages, areal linguistics, linguistic contact effect, a brief history of contrastive linguistics, bilingualism, code switching, basic concepts and main issues of the "contrastive" concept, methods and applications of areas of contrastive linguistics, and the comparison of phonological and morphosyntactic systems of the Hungarian and Slovak languages.

As the comparative method is indispensable in language learning, foreign language teaching and translation, the second part of this unit describes the basic concepts of translation, factors of the translation process, translation types, various phenomena of equivalence, transfer and interference phenomena, transfer operations (translation techniques), and the issue of correspondence

between literary texts and their translations. When defining translation, the author considers it vital to focus on the intercultural nature, based on the translation principle of "domestication" supporting pragmatic adaptation. This means that when translating literary texts, the translator must prioritize the target language culture.

In the chapter on equivalence, the key concept of translation theory, the author briefly presents various theories on the concept of equivalence, followed by a detailed description of transfer operations. The unit ends with a brief overview of the history of translation theory, which includes a description of the various names, including specialized terms of translation theory, translatology, traductology, and translation studies. In addition, it covers the history of these research studies, concepts, and models, touching upon the inconsistencies regarding the use of terminology.

The second unit, split into eight chapters, deals with the theory of literary translation and the practical issues of literary translation theory and literary translation. After defining the terms of literary translation and translation of literary works, the author draws parallels between issues of linguistic translation theory and literary translation theory, mentioning the role of literary translation in intercultural communication, as well as the importance of domestication prioritizing the target reader, concluding that this is an increasingly common procedure in today's translation practice.

The author dedicates a full chapter to the concept of communicative equivalence, emphasizing that the latest literature on literary translation discusses both equivalence and the issue of translatability and non-translatability in the literary paradigm of the postmodern age, and thus the literary theory concept of rewriting is introduced. In connection with this, the author presents in detail the concept of literary translation as a pragmatic adaptation (i.e. secondary text creation), according to which the translated target language text should primarily fit into the practice and canon of the target-language culture text creation. A further chapter deals with the issue of translatability of poetic texts, the differences between the prosodic and imaging traditions of different languages.

In this part of the book, the author presents contrastive analysis possibilities of poems by Sándor Petőfi, János Arany, Attila József, Dezső Kosztolányi, the one-minute short stories of István Örkény, and the English and Russian variants of Magda Szabó's novel *Az ajtó* (The Door) on different text levels, namely grammar, semantics, and pragmatics, interacting with each other in the following way: it takes into account elements on the acoustic level, then the set of words and expressions, the formal and sentence-level phenomena, elements of imagery, extralinguistic features, and stylistic devices.

The author uses the functional stylistic method to compare texts created in different cultures and language typologies. On the one hand, these contrastive

analyses help the reader better understand the process of literary translation, while, on the other hand, they take the reader of both the source and target language texts closer to the evaluation of literary translations and the interpretation of the inevitable transfer operations of compensation and substitution of poetic texts as well as the phenomenon of rewriting.

The conclusion of the second unit of the book may be the intercultural nature of literary translation, as the literary translator is primarily a cultural mediator while interpreting the meaning of the text in a foreign language. As far as equivalence relations are concerned, the author identifies with the increasingly accepted view of translation analysis that the source language text (considered to be invariant) cannot be fully reproduced in the target language text (variant of the source), which is only one similar text variant of the many possibilities. The analysis of English and Russian translation variants of different poems and prose texts shows that different language texts reach an equivalent status with each other, and adequate translations come into being once the source- and target-language style-creating canons of particular cultures match.

The book ends with a bibliography, indexes of names and topics, quickly helping those interested in finding the desired topic, and it also provides additional guide in the given topic. The English and Slovak language summaries offer an insight into the topics of the book for foreign readers.

In conclusion, *Kontrasztív nyelvészet, kontrasztív stilisztika* (Contrastive Linguistics, Contrastive Stylistics) is a useful handbook for anyone interested in the principles, procedures, and methodology of contrastive linguistics, translation theory, literary translation, and translation evaluation, and it is recommended to professionals, practising teachers, translators, literary translators, university students, or the general public.

Anca Peiu: *Faulkneriana. Back to (and beyond) Yoknapatawpha*

Bucharest: C.H. Beck, 2019

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Anca Peiu's *Faulkneriana* is a collection of academic essays and studies on William Faulkner, a worthy tribute to the great American novelist's entire oeuvre. The volume includes updated and elaborated versions of twenty scholarly papers published in a range of academic journals, and several introductory studies accompanying the Romanian translation of Faulkner's novels and short stories – some of them translated by Anca Peiu herself. The writing and first publishing of the papers collected in this work spans about twenty years (the oldest one dating back to the turn of the 21st century), the stretch of time alone betraying the author's fascination by Faulkner's genius and her dedication to spread his words among Romanian readers by translating and sometimes even retranslating (as is the case of the novel *Intruder in the Dust* (1948)) Faulkner's works. Apart from translation, which is challenging and demanding due to the "baroque narrative style" and the "exquisite stylistic particularities" (p. 168) of the Faulknerian text, Anca Peiu contributes to the writer's reception through fine-grained literary analyses of his stories.

There is a close affinity between the manner the American novelist incrementally constructs his imaginary county called Yoknapatawpha by continually adding new stories and characters, and revising old ones throughout his writing career, and the Romanian literary critic's fashion of revisiting the same books via a different route every time, with the fresh perspective opened up by new literary, cinematic, and personal experiences gained over the course of two decades.

Anca Peiu's interest in Faulkner's curious habit of charting and recharting his virtual territory is obvious right from the beginning. The first essay in the volume, entitled "Jefferson, Yoknapatawpha – A Double Fictive Map Alive", dwells on

Faulkner's puzzling way of placing his stories on the two maps designed and drawn by him nine years apart from each other, presumably with the intention to assure some coherence across his main works by unifying them via this visible and tangible evidence – the map, substantiating the stories and ushering the reader at the same time. The focus is on how two masterpieces written in the same year (1930), the novel *As I Lay Dying* and the short story "A Rose for Emily", occur on two different maps: the first one is placed on the 1936 version of the map, and the second one surfaces only nine years later, on the 1945, redesigned version. This distribution of the two works to different maps is all the more curious since they both have a very definite common core: they both feature a woman as the main character, and they both scandalize with the stench of decomposing corpses.

Through a series of essays, Anca Peiu tracks the making of Yoknapatawpha County visualized on the two maps, interpreting it to be more than a symbol of the Old South, as most critics regard it. In her interpretation, Yoknapatawpha "is a fine fictive microcosm often representing the entire United States of America" (p. 112). The most promising environment for Peiu's investigation is *The Snopes Trilogy* consisting of the novels *The Hamlet*, *The Town*, and *The Mansion*, completed in about twenty years by the American writer. Even though separate essays are dedicated to all three parts of the trilogy, discussions about the novels recur regularly in the volume. This recurrence of the discussion about the same or similar stories is not an end in itself but a reflection of Faulkner's habit of recycling short stories written earlier in his career, revising and integrating them into his later novels, which, on their turn, were conceived to be the building blocks of an even greater structure: a trilogy. The detailed knowledge of the early short stories as well as their later transformation into novels lead Anca Peiu to the realization of the multiple polarities characterizing Faulkner's maps: "On the map of Yoknapatawpha County, these stories establish such polarities as the following: countryside (Frenchman's Bend) – city (Jefferson); self – other; center – margin" (p. 182).

A more observant look on the literary critic's part reveals that Jefferson, which is situated at the very core of Faulkner's maps, is not even a city but just a small town inhabited by "an amorphous primitive mob" (p. 170), very much resembling the writer's hometown, Oxford, Mississippi. Even the name of the town is misleading. Most readers would probably assume that the town was named after Thomas Jefferson, the great American statesman and author of the *Declaration of Independence*. And they would be right as far as the ambition of the townspeople is concerned to pick the name of such an illustrious person. However, the town was not directly named after the third American president but after an intermediary called Thomas Jefferson Pettigrew, the respectable postman of the town, whose anti-heroic family name cannot possibly be counterbalanced by his grandiose first names, rendering him ridiculous rather than illustrious. And

if someone as well-versed in Faulkner's work and life as Anca Peiu complements the picture with the autobiographical detail of Faulkner's short-lived job as a postmaster in Oxford in his youth, the reader gets a foretaste of the complexity of the Faulknerian multilayered narrative, where dignity, heroism, irony, and self-irony form such a unique blend. The volume abounds in debunking such Faulknerian twists by bringing together details from different novels, short stories, intertextual references, and autobiographical evidence.

However disadvantageously may Jefferson be portrayed, Faulkner still considers it important enough to situate it in the core of the Yoknapatawpha microcosm "quite like a beating heart" (p. 23), as "a live metaphor (…) of the Faulknerian urban space" (p. 33). But instead of the effervescent atmosphere and spiritual sophistication one might expect to find in an urban area, Jefferson astounds with its stifling, paralysing ambience. As Anca Peiu points out in her essay "Jefferson, Yoknapatawpha – A Double Fictive Map Alive" discussed earlier, neither the spinster in "A Rose for Emily" nor the fecund woman Addie Bundren in *As I Lay Dying* has anything to do with the living – "the Jefferson they belong to is a town of ghosts" (p. 6). Emily lives as a recluse with the horrendous secret of hiding a corpse in her bedroom for years, while the Bundrens drag Addie's coffin with her inside for nine days so that she can finally reunite with her family of origin – in the Jefferson cemetery.

Being a keen observer, Anca Peiu confidently puts her finger on every unusual spot of both the content and the graphic representation of the narrative such as Addie being laid in the coffin in a reversed position so as not to crease her wedding dress or the insertion of simple drawings in the body of the text whenever words seem to be inadequate. As an avid reader of Faulkner from a tender age, Peiu has learned that when reading Faulknerian narrative "the reader must contribute his fair share of ingenuity to the game of fiction" (p. 207). She has worked out the rules of the game, and she ingeniously plays along. Applying the rule of reversal to her own interpretation of the text, she surprises us with the question referring to Emily and Addie, whose deaths are announced in the stories: "But are they *the dead*? (…) It is rather Addie's family and friends, and likewise, Emily's neighbors (the numb townspeople of Jefferson, rigid in their narrow-minded gossip and sterile assumptions) who are the dead – in both stories" (p. 8).

The only type for whom Jefferson ensures a favourable environment is the despicable and profit-hungry businessman represented by Jason Compson and the Snopeses, whose attitude towards life and conduct is discussed in a number of essays. Other extensively discussed phenomena include Faulkner's preoccupation with failed motherhood, insanity, suicide, war, Africanism, and miscegenation, as well as dysfunctional dreamers of the alluring American dream – all of them unravelled from Faulkner's writings and supplied with a rich web

of references to other literary works belonging to American and world literature, but also to films and history.

The main strand that holds all these wide-ranging topics together is the author's ambition to locate all the stories and characters on Faulkner's palimpsestic map, where – beneath the graphic representation of the fictitious Yoknapatawpha – she can palpate Faulkner's autobiographical places, and she draws our attention to an even deeper stratum, where eternal human values, ambitions, struggles, and tragedies reside.

Apart from the twenty essays, the volume contains a chronological and biographical key to William Faulkner and his contemporaries, as well as the reproductions of the two maps of Yoknapatawpha.

The book cover designed by Ion Aramă evokes the recurring image of a *dark house* amply discussed in several essays as a twice opted for and twice dropped title of two Faulknerian novels eventually entitled *Light in August* (1932) and *Absalom! Absalom!* (1936). The dark house motif rooted in such prominent literary works as E. A. Poe's "The Fall of the House of Usher", Charles Dickens's *Bleak House*, or F. M. Dostoevsky's *Memoirs from the House of the Dead* appeals to Faulkner's imagination as a building never meant to become a home, although "a home is the ultimate desire" for many Faulknerian protagonists (p. 125). Tragically, all of them spend most of their lives behind prison-like buildings with bleak walls and grated windows very much resembling Ion Aramă's sketch. Some of them waste away in Parchman prison, such as Mink Snopes, others in Jackson asylum, such as Benjy Compson and Darl Bundren, and the rest "just" endure in the parental place "pretending it is (…) her home", such as Judith Sutpen and Linda Snopes (p. 151).

In order to get a closer understanding of all these characters' fate, we "require the book, plus the map, plus the chronology, plus the genealogy. And the meaning within it all will still stay a mystery" (p. 38). Anca Peiu's insightful essays are meant to dispel some of the mystery and reveal latent correlations across Faulkner's own works and other great works of world literature, cinematic art, history, and important current affairs.

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