Forum
Social Sciences Review
Társadalomtudományi Szemle

Content:

2025

5

FÓRUM TÁRSADALOMTUDOMÁNYI SZEMLE
FORUM SOCIAL SCIENCES REVIEW
ANNUAL SCIENTIFIC JOURNAL IN ENGLISH LANGUAGE
Volume XXVII (2025)

Editor
BARNABÁS VAJDA
Head of the Editorial Board
LÁSZLÓ ÖLLÖS

Members of the Editorial Board
Zoltán Biró A. (Romania), Gábor Csanda (Slovakia), Csilla Fedinec (Hungary), Holger Fischer (Germany), László Gyurgyík (Slovakia), Péter Hunčík (Slovakia), Petteri Laihonen (Finland), Zsuzsanna Lampl (Slovakia), István Lanstyák (Slovakia), Zsolt Lengyel (Germany), József Liszka (Slovakia), András Mészáros (Slovakia), Attila Simon (Slovakia), László Szarka (Hungary), Andrej Tóth (Czech Republic), László Végh (Slovakia)

English translation and proofreading: László Zala

Content

Studies

Central European Forum

Book reviews

Our journal is part of the European Reference Index for the Humanities and the Social Sciences – ERIH Plus evaluation system. It is also part of the Central and Eastern European Online Library (CEEOL) international datbase. Fórum Social Sciences Review is acknowledged by the Historical Committee of the Hungarian Academy of Sciences (MTA Történettudományi Bizottsága) as a fully accredited publication forum.

The publication is supported by the Hungarian Academy of Sciences (Magyar Tudományos Akadémia)

FÓRUM TÁRSADALOMTUDOMÁNYI SZEMLE Editorial Office. In Hungarian: Fórum Kisebbségkutató Intézet, Park utca 4, Somorja, 931 01 Szlovák Köztársaság. In Slovak: Fórum inštitút pre výskum menšín, Parková 4, 931 01 Šamorín, Slovenská republika. In English: Fórum Minority Research Institute. Park Street 4, 931 01 Šamorín, Slovak Republic. • E-mail: vajdabb@gmail.com; ollos.laszlo@foruminst.sk • Publisher: Fórum Kisebbségkutató Intézet Somorja / Fórum inštitút pre výskum menšín Šamorín, IČO: 34 028 587, represented by the Director, Attila Simon. • Making-up and graphics by Juhász Rokko – Kassak Centre for Intermedial Creativity, Érsekújvár / Nové Zámky • The publication is supported by the Magyar Akadémiai Tanács (SZMAT) • 2025 December • Registration Number: EV 904/08 • ISSN 2729-9740 • Internet: http://www.forumszemle.eu

STUDIES

ŠTEFAN GAUČÍK

In the Force Field of Politics and Economy. The Situation of the First Savings Bank of Bratislava After the First Vienna Award[1]

Abstract: The study deals with the situation of the First Savings Bank of Bratislava after the First Vienna Award in 1938. The financial institution, which at that time was the oldest commercial bank in Bratislava, found itself in a special situation, existing at a point of conflict between Slovak and Hungarian political and economic interests. The author focuses on the bank's financial strategies, as the new state border posed serious dilemmas for its management and shareholders, including the need to reorganize the bank's branch network on Hungarian territory and the restructuring of interests, which required new compromises. The author pays particular attention to the role of Count János Esterházy, who, as president of the bank, played a symbolic function and acted as a mediator between the Slovak and Hungarian political and economic elites. The bank became the financial institution of the Hungarian minority in Slovakia under the Slovak–Hungarian Economic Agreement of 1941, but it was merely an ethnically tinged means of communication. The First Savings Bank of Bratislava was in fact part of the Hungarian General Credit Bank, and it had the specific tasks of ensuring the financial operations of the exchange of goods between Slovakia and Hungary and of carrying out clearing transactions.

Keywords: First Savings Bank of Bratislava; banking history; economy and politics

https://doi.org/10.61795/fssr.v27y2025i5.01

Introduction

On October 28, 1941, a festive meeting was held by the board of directors and the officials of the oldest financial institution of Bratislava, the Savings Bank of Pressburg (Hungarian: Pozsonyi Takarékpénztár; German: Pressburg Sparkassa). The institution had been founded in 1841 by the German merchant bourgeoisie and Hungarian nobility and it operated during the Second World War under the name of the First Savings Bank of Bratislava (Hun.: Bratislavai I. Takarékbank; Slovak: Bratislavská prvá sporivá banka).[2]

1 The present study was written as part of Project No. APVV-20-0526 Political socialization in the territory of Slovakia during the years 1848–1993, implemented by the Institute of History Slovak Academy of Sciences.

2 I have dealt with the circumstances of the foundation of the bank, its operations in the 19th and the 20th centuries, and its credit policy, management, and donation strategies in several of my studies: Gaučík 2004: 59–82; Gaučík 2007: 83–97; Gaučík 2010: 140–150;

The management and the shareholders gathered to bid farewell to the officials who had requested to retire and to those whose 25 or 40 years of service had come to an end. At the meeting, János Esterházy, the new, and the last, president of the institution gave an address. Due to his position as president, he spoke not only about the people who were being celebrated but also about the business philosophy that the bank had followed and should follow, which supported the nation and was grounded in ethics.

> I think today we should prioritize our festive feelings rather than the painful emotion of saying goodbye. We Hungarians rarely have the opportunity to celebrate these days. I do not mean ordinary celebration. I have the image of the development of a Hungarian institution and the example of Hungarian day laborers before my eyes and my soul is filled with joy and a festive feeling. I see a definitely great value gain for Hungarians in the fact that this renowned and excellent old institution can now integrate into the creative work of Hungarian capital, Hungarian wealth, and Hungarian entrepreneurship, and can serve Hungarian interests. This institution has always been the custodian of the noble traditions of Bratislava. These traditions not only prescribe an exact and conscientious fulfilment of duties to the last strength, but these traditions also recognize gratitude as a moral duty. We should be all the more grateful to our friends now because most of their service did not fall in peaceful, quiet, calm years, but in times when storms shook the foundations of countries, and some countries were even swept away by these storms, but our institution withstood them. It never wavered for a single moment, and even if it had difficulties, it overcame them. I am confident that this will be the case in the future as well, and it is with this confidence that I shake hands with those who are leaving and whom we are celebrating. I am not saying goodbye to any of them because I want to believe that our many decades of joint work will continue in friendship in the interest and for the benefit of the newest and very important bastion of the local Hungarians, the First Savings Bank of Bratislava.[3]

Esterházy's address elicits several questions. Did the management of the bank have any reason to celebrate in the middle of the Second World War? Was the bank serving the Hungarian minority after 1938? Did it take on tasks that had a character of national service? Was the First Savings Bank of Bratislava functioning as a financial center of the Hungarian minority in the Slovak state headed by Jozef Tiso? Why did a non-specialist, non-politician, János Esterházy, become the head of the institution in 1941? The image of an ethnicity-based credit institution implementing independent business

Gaučík 2012: 161–177; Gaučík 2013: 109–138; Gaučík 2019a: 116–131; Gaučík 2019b: 190–214; Gaučík 2020: 116–131; Gaučík 2021a: 181–202; Gaučík 2021b: 439–464.

3 Archive of the National Bank of Slovakia (hereafter referred to as ANBS), Bratislavská I. sporivá banka [First Savings Bank of Bratislava] (hereafter referred to as FSBB), Kniha zápisníc [Book of Minutes], Reg. No. 15, Jegyzőkönyv Bratislavai I-ső Takarékbank R. T. igazgatósági üléseiről [Minutes of the Meetings of the Board of Directors of the First Savings Bank of Bratislava Joint Stock Company] 1939–1945, 1941. október 28. jegyzőkönyvhöz csatolt irat [Document Enclosed to the Minutes of October 28, 1941].

strategies formed an essential element of the president's speech. Did this message reflect reality, or did the financial institution have a completely different position and function as a financial service provider in the Slovak banking system that was being reshaped after the First Vienna Award? These are the questions I aim to answer below.

However, before discussing the situation of this Bratislava bank after 1938, I first briefly introduce the most important characteristics of the interwar Czechoslovak banking system. I discuss the financial institutions that used Hungarian as their administrative language and their financial situation, and then I illustrate, looking primarily at the context of southern Slovakia, the changes in banking and finance caused by the First Vienna Award, which created new economic spaces.

Hungarian Financial Institutions in Interwar Czechoslovakia[4]

After 1918, momentous changes took place in the credit organization system of Czechia and Slovakia. The disintegration of the monarchy's labor division system and the dire consequences of its collapse had to be reckoned with even in the banking sector, and the effects of the economic crisis could not be avoided either. Domestically, majoritarian economic nationalism in the service of Czech and Slovak nation-state building incited political, ethnic, and social tensions and launched an open attack on Hungarian and German economic positions. Financial and banking policy, as well as banking laws and centralization, were at the service of laying the foundations of the nation-state. Bank concentration played a major role in the rationalization of the Slovak banking system.

When the new nation-state was established, the Czech and the Slovak political and economic elite set as their goal not only independence under state law but also the creation of a majority-controlled national economy. From the perspective of the Hungarians in Slovakia, the practical steps of the centralist and discriminatory economic policy (and of the financial policy that formed part of it) sought to eliminate dependence on Budapest and downgrade Hungarian capital. The creation of an independent customs territory and the implementation of regionally centered separation of funds (i.e., the stamping and withdrawal of Austro-Hungarian banknotes from circulation) were the first results of this nationalist economic policy (Průcha 1974: 144–147; Horváth–Valach 1975: 23–24). These were followed by the declaration of the Czechoslovak currency as legal tender and the creation of the Bank Office (Bankový úrad), which performed the duties of a central bank until 1926 (Lacina 2000: 150, 153).[5]

4 For an overview of the banking system in Slovakia and the situation of Hungarian financial institutions, see Gaučík 2008: 47–62.

5 The Czechoslovak National Bank was established in 1926.

The situation of Hungarian financial institutions was negatively impacted by interventions that violated institutional autonomy and by measures that impeded business transactions. State supervision and license-dependent foundations favored banks that were managed by Czechs and Slovaks. Slovak credit institutions underwent their most serious restructuring in 1920. The law, received with distrust by contemporary bank managers, carried a practical notion: savings banks, which had been actually operating as deposit banks in the Kingdom of Hungary from the first half of the 19th century, now became commercial banks both in form and company name.[6]

The restructuring of the economic conditions of the region and the economic difficulties caused by the political upheaval called for new solutions. The accumulating financial problems, such as uncertainties around the settlement of war loans, the issue of the return of Budapest securities, currency losses, and the threat to the mobility of institutions, forced the non-Slovak interests to unite.

The Association of Financial Institutions in Slovakia and Subcarpathian Rus[7] was established as a grouping for the protection of the interests of Hungarian and German banks in 1920 (the preparatory committee had already begun its activities in the autumn of 1919). The Prague government shortly treated the association, which capitalized on its financial connections in Budapest and its experience in managing Hungarian banks, as a negotiating partner. In 1922, 83.29% of all financial institutions in Slovakia and Subcarpathia were united in this Association of Financial Institutions. From the beginning, the association undertook to build relations with state authorities and help institutions in serious crisis to recover financially.[8]

The financial institutions that used Hungarian as their administrative language gradually lost their positions against Slovak banks, as the latter enjoyed state and political support, and their networks of branches also declined due to the increasingly stronger expansion of Czech institutions. Their geographical milieu was unfavorable: they were located in the peripheral southern border region, far from the major commercial centers, and they could realize only limited capital accumulation due to the impoverishment of the population. Within the Czechoslovak banking system, Hungarian financial institutions had a negligible financial weight for several reasons, including the inheritance of the uncompetitive small bank type, the agricultural background, and the narrowed local markets.

6 Az új takarékpénztári törvény. *Pénzügyi Szemle*, April 14, 1920, Vol. 2, No. 15. 5–6.

7 The official name of the association was used in three language variants (Jednota peňažných ústavov na Slovensku a Podkarpatskej Rusi in Slovak, Pénzintézetek Egyesülete Szlovenszkón és Podkarpatszká Ruszban in Hungarian, and Verband der Geldinstitute in Slovensko und Podkarpatska-Rus in German).

8 For more details on the activities of the association in the context of the Czechoslovak–Hungarian economic relations, see Gaučík 2022: 241–262.

The most important Hungarian banks were the First Savings Bank of Bratislava, the Dunabank, and the People's Bank of Bars County (Hun.: Bars Megyei Népbank). These institutions rescued small rural Hungarian banks that had fallen into crisis and thereby promoted the consolidation and concentration of the Slovak banking system. Despite the unfavorable financial policy towards non-Slovak financial institutions, the First Savings Bank of Bratislava drew into its sphere of interest and affiliated several rural Hungarian institutions, including the First Credit Institution of Komárno (Hun.: Komáromi I. Hitelintézet), the First Savings Bank of Šaľa (Hun.: Első Vágsellyei Takarékbank), the First Bank of Levice (Hun.: Lévai I. Bank), the Savings Bank of Rimavská Sobota (Hun.: Rimaszombati Takarékbank), and the Credit Institution of Tornaľa (Hun.: Tornaljai Hitelintézet).

Below, I examine the banking sector in the new economic geography that resulted from the First Vienna Award, in Slovakia and in territories restored to Hungary.

Financial Institutions in "Restored" Areas

For the second time since 1918, the financial institutions located in the territories restored to Hungary faced a new organizational change and became the subject of centralizing economic policy processes. In the period from November 1938 to mid-1939, the Hungarian government implemented a series of monetary policy and financial policy measures aimed at reintegration (a monetary reform, a regulation of payment transactions, a restriction of lending, the introduction of commercial and credit laws, etc.). The Hungarian National Bank (Hun. Magyar Nemzeti Bank) and the Financial Institutions Center (Hun. Pénzintézeti Központ) supervised the banks and provided the technical and administrative background for their financial consolidation (Gaučík 2014: 119–121).

In 1938, 15 Hungarian financial institutions ended up on Hungarian territory, of which seven were not independent but affiliated ones. These financial institutions were forced to completely reorganize the network of their branches. Among these smaller institutions, five in the sphere of interest of the First Savings Bank of Bratislava were now situated on the other side of the border. From 1939 onwards, two processes could be identified in these areas. On the one hand, Slovak branches were taken over and liquidated while, at the same time, protracted Slovak–Hungarian negotiations and battles over interests were taking place in terms of capital takeovers and settlements. On the other hand, the large banks of Budapest, mainly the Hungarian General Credit Bank (Hun. Magyar Általános Hitelbank), the Hungarian Commercial Bank of Pest (Hun. Pesti Magyar Kereskedelmi Bank), and the Hungarian Settlement and Exchange Bank (Hun. Magyar Leszámító és Pénzváltó Bank) built up networks of their branches and acquired industrial and agricultural interests. The respective capital of the above-mentioned small

banks did not significantly increase the total capital of the institutions of the Hungarian banking system, as it increased only by 3% and the savings deposits only by 4.5%.[9]

The Slovak Economy Under the Patronage of the Third Reich

After March 14, 1939, the Slovak banking system found itself in a national economic framework of a different character and different interests. The political events of 1938–1939[10] marked a watershed moment also in banking: the banking structure built under the First Czechoslovak Republic disintegrated into its elements, and the influence of German capital, made evident by the German–Slovak treaty of March 23, 1939, became decisive. From both a political and an economic point of view, Slovakia became a satellite of Germany and, as its puppet state, found itself completely at its mercy.[11] In terms of commercial banks, during the structural changes that took place in the reduced Slovak territory,[12] in which the effects of state centralization became strongly manifest, institutions with smaller capital strength disappeared and the weight of large banks that received support from the political party (e.g., Peasant Bank [Slovak: Sedliacka banka] and Tatra Bank [Slovak: Tatra banka]) increased.

In Slovakia, a monetary reform took place in March 1939, an independent central bank was established, and other specialized financial organizations were born (Kačkovičová 2003: 392). Temporarily, the military conjuncture had a rejuvenating effect on the economy. In addition to the state's economic development programs, Aryanization (i.e., the seizure of property from Slovak Jews) took priority. The state itself became the biggest Aryanizer, and it sold these properties in various forms. The wealth of the Slovak state increased by approximately 1.1 billion crowns, and speculation over these assets was

9 On the economic integration of the Upper Hungarian regions, see Demeter–Radics 2007: 65–82. On the problems of the financial institutions caused by the border change, see Gaučík 2007: 83–97.

10 For a summary of the circumstances, pre-history, and the diplomatic and political history of the First Vienna Award, see Sallai 1997. On Slovak–Hungarian negotiations, see Janek 2006: 97–115.

11 Tönsmeyer 2003. The dependence of Slovak economy, which was a peripheral economy, on Hungary was emphasized by Lajos Jócsik, who considered Slovakia's one-sided economic orientation to Germany harmful; see Jócsik 1944: 371–404.

12 From 1938 onwards, Devín and Petržalka belonged to Germany. Hungary occupied Subcarpathia March 15–18, 1939. In March 1939, German military units established a defence zone in the Moravian–Slovak border zone, from which they supervised the arms industry. On the Slovak–German border dispute that affected Bratislava and its vicinity, see Janas 2004: 121–128.

given free rein. According to moderate estimates at the time by economists, Aryanization and state-directed forcible nationalization caused significant economic damage.

Jozef Tiso's government assigned a major role to the credit organization and to commercial banks, mainly in order to gain Slovak influence and suppress and liquidate Jewish and Czech capital interests. They wanted to win over these Slovak banks and the new capital centers, which were created as part of bank concentration, and make them pillars of the government's economic policy. Moreover, they were planning to form capital centers through bank mergers. To a decisive extent, the restructuring of the Slovak banking system was determined by the various radical domestic lobby groups and the German will, and the reorganization concepts were pervaded by political and ideological interests (Hallon 2000: 75–98).

The Peasant Bank and the Tatra Bank were chosen as the two centers of the concentration, which had been planned from 1939 and was carried out in the form of capital transfers between 1941 and 1943. Both banks took over the smaller domestic institutions and their branches, to a lesser extent also the branches of foreign (now Protectorate of Bohemia) institutions. Three smaller institutions (the People's Bank [Slovak: Ľudová banka], the Bank of Central Slovakia [Slovak: Stredoslovenská banka], and the Myjava Bank [Slovak: Myjavská banka]) received a lower share, and the Slovak Bank (Slovak: Slovenská banka), which was considered to be politically unreliable, could not even participate in the process. The capital share of Slovak banks amounted to 1.225 trillion crowns. Imperial German capital also consolidated its positions, and Unionbank came under the sphere of interest of the Deutsche Bank, the German Commercial and Credit Bank, and the Dresdner Bank. Eleven financial institutions remained as a result of this concentration, including six Slovak, three German, and two Hungarian ones (Holec–Hallon 2007: 207–216).[13]

The Slovak literature does not consider commercial banks to be among the primary beneficiaries of Aryanization. According to the initial ideas, the banks should have financed the credit needs of Aryanizing individuals, but they rejected this. However, they could no longer be exempted from the mediation of Jewish capital: Jewish deposits approximately amounting to 350 million crowns and securities amounting to 1.5 billion crowns went to state financial institutions through the banks. The transfers increased their expenditure costs, and their bad debts also increased. Only traces remained of their conjunctural business activities (Hallon 2006: 591–606).

13 The concentration was influenced by four factors: (i) the competition of Slovak banks among themselves for obtaining state aid, (ii) the power influence of Germany, (iii) the political and economic changes taking place in the Protectorate of Bohemia and Moravia, and (iv) the results of Slovak–Hungarian interstate negotiations; Ryník 2003: 370.

The Dilemmas of the Bratislava Institution: Capital Rescue and Institutional Consolidation

The new, forced community of the more than 67,000 Hungarians who remained in Slovakia became vulnerable and fell victim to domestic and foreign political interests. In the midst of attacks by Slovak minority policy, few effective means remained for the political elite led by János Esterházy to strengthen minority cohesion, and even these can be considered only symbolic ones, with which they wished to strengthen the local levels of their sense of identity. Just like in the interwar situation, the economic support of the Hungarians in Slovakia by Hungary remained an illusion as, due to the disintegration of the former Little Entente states (except for Romania) after the Munich Agreement, Hungary had already been living under the spell of a "central power" in the region—a power built on sand—by 1941. Neither its foreign policy concepts nor its financial resources made such a policy possible, especially during the war. By 1941, the Hungarian economy had been catering to the needs of the German economy like any other country's economy had in the region (Kaposi 2002: 319).[14]

In the background of the power-political matchups between the two neighboring countries and the conflicts arising from unresolved minority issues, the so-called national ethnic groups (i.e., the financial institutions of Slovakian Germans and Hungarians) appeared in the Slovak banking system as a result of Imperial German pressure. These categories were created by the national political practices and interests of the time, but we must not forget that they were fundamentally economic organizations. As a result of the Slovak–Hungarian economic agreement, two banks (the First Savings Bank of Bratislava and the Credit Bank of Spiš [Hun. Szepesi Hitelbank]) were declared the financial institutions of Hungarians in Slovakia in 1941. The institutions of the Germans in Slovakia were managed and controlled by the large banks of the German Empire. The situation of the First Savings Bank of Bratislava can therefore be examined only within the context outlined above.

In the autumn and winter of 1938, the management of this financial institution faced a number of problems. The first included the financial problems that arose from the border change, including the obstacles to the extension of bills of exchange submitted by their affiliates, deposit withdrawals, difficulties in keeping track of deposit placements, interest losses, and the uncertainties of the securities business (they stopped buying Czechoslovak government bonds for a while).[15] The bank had reported an unfavorable balance sheet due

14 On the 1939 plan of the economic organization of the Hungarians in Slovakia, see Magyar Nemzeti Levéltár Országos Levéltár [National Archives of Hungary], K 69, Bundle 639, Folder 5, 4c, "E" – Czechoslovakia.

15 ANBS, FSBB, Kniha zápisníc [Book of Minutes], Reg. No. 37, Végrehajtóbizottsági jegyzőkönyv [Minutes of the Executive Committee] June 26, 1936, to September 15, 1939.

to the tense and unpredictable political situation already in September 1938: its deposit portfolio had decreased, and it had incurred significant interest losses. In this situation, it was forced to take a loan from another financial institution. The idea of relocating the institution to a safer part of the country further away from the border also came up. To avoid future damages and the loss of documents, its most important documents and files were deposited in another building in Bratislava, where its inspection department was also placed. The latter was moved back to its headquarters in November.[16]

From November 1938 onwards, the management of the bank was holding tentative negotiations with the Hungarian National Bank, the Financial Institutions Center, and the First Domestic Savings Bank of Pest (Hun. Pesti Hazai Első Takarékpénztár) to settle overdue offset bills of exchange as a first step. Their affiliated institutions that had found themselves in Hungarian territory had to deposit their bills of exchange in the financial institution in Pest and place their debts in a separate account. With the guarantee of the Bratislava institution, these institutions could submit their loan applications to the savings bank in Pest. They notified their stakeholders of this by letter, set the terms of the financial transactions, and assured them that their connection would be maintained and made even closer. Moreover, their credit agreements would be extended, but they would be informed about their specific plans only later.[17]

The second important set of problems was their lack of knowledge of the new legal environment. They did not know what new financial provisions applied to their institutions, which were now located in the territory of another country—in Komárno, Šaľa, Levice, Rimavská Sobota, and Tornaľa.[18]

Minutes of October 10, 1938. Ibid., Kniha zápisníc [Book of Minutes], Reg. No. 14, Jegyzőkönyv a Bratislavai I-ső Takarékbank R. T. igazgatósági üléseiről [Minutes of the Meetings of the Board of Directors of the First Savings Bank of Bratislava Joint Stock Company] January 13, 1932, to April 21, 1939, Minutes of November 11, 1938.

16 ANBS, FSBB, Kniha zápisníc [Book of Minutes], Reg. No. 14, Jegyzőkönyv a Bratislavai I-ső Takarékbank R. T. igazgatósági üléseiről [Minutes of the Meetings of the Board of Directors of the First Savings Bank of Bratislava Joint Stock Company] January 13, 1932, to April 21, 1939, Minutes of September 26, 1938.

17 At the same time, they were holding negotiations also in Prague, but their details are unknown due to a lack of sources. They reported their claims and debts in the annexed territories to the Foreign Exchange Department of the Czechoslovak National Bank. ANBS, FSBB, Kniha zápisníc [Book of Minutes], Reg. No. 37, Végrehajtóbizottsági jegyzőkönyv [Minutes of the Executive Committee] June 26, 1936, to September 15, 1938. Minutes of November 19, 1938.

18 There were five affiliated institutions: the First Credit Institution of Komárno, the First Bank of Levice, the Bank of Rimavská Sobota, the First Bank of Šaľa, and the Credit Institution of Tornaľa. The Savings Bank of Šahy and the Credit Institution of Šamorín maintained their independence and had a contractual relationship with them.

The third problem lay in the increasingly difficult communication: instructions and personal contacts were practically interrupted for days or even weeks and this hindered banking operations, since, in its decision-making, the parent institution often requested, or even demanded, the presence of the representatives of the small financial institutions in Bratislava, as these possessed local knowledge and background information. Such communication, as a factor of uncertainty, was closely related to their fear of time (i.e., of how long this temporary situation would last). They were right to fear that, as a consequence of weakening relations, some institutions might tend to break away and become independent when seeing the weakness of the Bratislava one. A November 29, 1938, report of the two authorized officials of the Bratislava bank, Antal Mussoni and János Czabán, summarizing the results of their negotiations in Budapest, also rang the alarm bell about these dangers. An effort to become independent could be seen in two banks, the Bank of Rimavská Sobota and the Credit Institution of Tornaľa.

The institutions in Levice and Komárno showed loyalty. The Bratislava institution characterized the "separatist" goals of Rimavská Sobota as follows:

> However, there are certain elements in the Bank of Rimavská Sobota, which show that some people [...] are of the opinion that they will occupy a dominant position in the local market as an independent institution in the current situation. We informed them that, considering the financial situation of the institution, we do not view their plan as feasible, and we also warned them that our institution possesses the majority and is not willing to lead them to a side track. Our impression about this institution is that small, rural-minded ambitions without calculation or seriousness considered the time ripe for playing a big role.[19]

This angry expression of opinion indicated the seriousness of the situation. The Bratislava institution quickly confronted the revolting institutions in the Gemer region with the facts: they could become independent when the shareholders had repaid their loans. The secessionist efforts were defended by securing majority shares, personnel change, and strict credit agreements.

For the management, it was vital to save their interests in the Hungarian territory. Three options initially looked feasible: (1) opening a branch in Hungary, (2) restructuring one of the majoritized institutions, or (3) founding a new institution, provided that they managed to obtain the necessary approval. Since the Financial Institutions Center rejected the establishment of a branch—although only for a short time, as it turned out later—the idea of an "independent institution that fully serves our interests," as the then-pres-

19 ANBS, FSBB, Kniha zápisníc [Book of Minutes], Reg. No. 37, Végrehajtóbizottsági jegyzőkönyv [Minutes of the Executive Committee] June 26, 1936, to September 15, 1939. Report annexed to the Minutes of November 19, 1938.

ident Ludwig K. Vilmos put it, came to the fore even more prominently.[20] The name of this new bank would have been the First Savings Bank of Upper Hungary, and the Bratislava bank would have merged its affiliated institutions into it. Galanta or Nové Zámky was to become the location of its headquarters. Naturally, the majority of its shares would have been owned by the savings bank. Although the new institution obtained the right to collect deposits, it did not start its operations.[21]

Although the deadline for the foundation was constantly extended by the Financial Institutions Center, the Bratislava institution stepped back, and the credit institution in Komárno became preferred. Although the latter took over the "ownership right" of the other affiliated institutions according to Hungarian law, it was controlled by the Bratislava institution through its representatives. The First Credit Institution of Komárno took over the loan granting contracts and represented the Bratislava bank in the affiliative relationship, although only as its deputy. The operations of the institution were strictly monitored: the Komárno institution had to send monthly reports to Bratislava about the development of their business and the loans it provided and had to provide information continuously.[22]

By the end of 1939 or the beginning of 1940, the Bratislava institution had essentially consolidated its network of interest, although there are indications that the institutions of Tornaľa and Levice were also of opposing views regarding loan agreements, but the center always asserted its will. The management of the financial institution thus created new ways of raising capital and consolidated its influence over its affiliates.

20 ANBS, FSBB, Kniha zápisníc [Book of Minutes], Reg. No. 14, Jegyzőkönyv a Bratislavai I-ső Takarékbank R. T. igazgatósági üléseiről [Minutes of the Meetings of the Board of Directors of the First Savings Bank of Bratislava Joint Stock Company] January 13, 1932, to April 21, 1939, Minutes of December 9, 1938.

21 ANBS, FSBB, Kniha zápisníc [Book of Minutes], Reg. No. 38, Végrehajtóbizottsági jegyzőkönyv [Minutes of the Executive Committee]. Minutes of September 19, 1939, to September 27, 1939.

22 ANBS, FSBB, Kniha zápisníc [Book of Minutes], Reg. No. 15, Jegyzőkönyv Bratislavai I-ső Takarékbank R. T. igazgatósági üléseiről [Minutes of the Meetings of the Board of Directors of the First Savings Bank of Bratislava Joint Stock Company] 1939–1945, Minutes of November 9, 1939. ANBS, Komárňanská I. sporiteľňa [The First Savings Bank of Komárno], Reg. No. 8, Igazgatósági és közgyűlési jegyzőkönyvek [Minutes of the Board of Directors and the General Assembly] from 1926 to 1942, Minutes of October 29, 1939. On agreements with affiliates, see ANBS, Komárňanská I. sporiteľňa [The First Savings Bank of Komárno], Reg. No. 8, Igazgatósági és közgyűlési jegyzőkönyvek [Minutes of the Board of Directors and the General Assembly] from 1926 to 1942, Minutes of February 23, 1940.

Subordination and the Loss of Independence

A completely new situation arose by the end of May 1941: political decisions had overridden the economic interests of the financial institution. With the Slovak–Hungarian economic agreement, a decision was made to establish the already mentioned "showcase institutions." In Hungary, the Slovak Economic Bank (Slovak: Slovenská hospodárska banka), whose patron was the Slovak Bank, was established in the name of the Slovak minority.[23] In accordance with the principle of reciprocity, the Hungarian minority was represented by the First Savings Bank of Bratislava and the Credit Bank of Spiš.[24] In conformity with the interstate agreement, the Bratislava institution could set up a branch in Nitra and establish a credit relationship with the Spiš institution. However, these decisions were no longer within the authority of the management of the bank. The decisive change, through which the Bratislava institution lost its independence in May 1941, was its subordination to the Hungarian General Credit Bank on higher political order: it became an institution dependent on the credit bank. The shares were essentially bought by the Financial Institutions Center. However, according to the Slovak conditions, the share package could only be owned by the bank, so the shares were taken over by the credit bank.[25]

From April 1941, the business deals, the provision of loans and their authorization, and the employees' salaries and allowances were determined by the decisions of László Farkas, the representative, and practically the managing director, of the credit bank. Rudolf Kállay, the executive director of the credit bank, also participated in a May 30, 1941, meeting of the board of directors, where they made a decision about capital increase.[26] In August 1941, János Esterházy was elected president of the financial institution.[27]

23 ANBS, Slovenská hospodárska banka [Slovak Economic Bank], Box 2, Výročné správy [Annual Reports] 1941–1943, 1941 Annual Report.

24 ANBS, Spišská úverová banka [Credit Bank of Spiš], Korešpondencia [Correspondence], 1941 Annual Report.

25 ANBS, FSBB, Kniha zápisníc [Book of Minutes], Reg. No. 15, Jegyzőkönyv Bratislavai I-ső Takarékbank R. T. igazgatósági üléseiről [Minutes of the Meetings of the Board of Directors of the First Savings Bank of Bratislava Joint Stock Company] 1939–1945, Minutes of August 16, 1941.

26 ANBS, FSBB, Kniha zápisníc [Book of Minutes], Reg. No. 15, Jegyzőkönyv Bratislavai I-ső Takarékbank R. T. igazgatósági üléseiről [Minutes of the Meetings of the Board of Directors of the First Savings Bank of Bratislava Joint Stock Company] 1939–1945, Minutes of May 30, 1942.

27 ANBS, FSBB, Kniha zápisníc [Book of Minutes], Reg. No. 15, Jegyzőkönyv Bratislavai I-ső Takarékbank R. T. igazgatósági üléseiről [Minutes of the Meetings of the Board of Directors of the First Savings Bank of Bratislava Joint Stock Company] 1939–1945, Minutes of August 31, 1941. *A 100 éves Bratislavai I. Takarékbank R. T. azelőtt Pozsonyi I. Takarékpénztár, 1842 – 1942*. Pozsony, Litera, 1942, 30–31.

Subsequently, the First Savings Bank of Bratislava belonged to the sphere of interest of the Hungarian General Credit Bank and was affiliated with the latter. In Hungarian national policy discourse, it was designated as "the minority Hungarian financial institution" or "the Hungarian bank," but this seemingly "ethnic" image emerged only after the 1941 Slovak–Hungarian interstate agreement. The savings bank was a "stabilizing" element in the economic contacts between the two countries. It took part in the financial operations of the exchange of goods and the handling of clearing-related transactions between the two countries. János Esterházy only played a symbolic and mediating role; he did not, and could not, have any influence on the business processes or the business policies of the bank. These were the developments that were woven into the deep fabric of Esterházy's speech mentioned in the introduction.

Literature

A 100 éves Bratislavai I. Takarékbank R. T. azelőtt Pozsonyi I. Takarékpénztár 1842–1942. Pozsony, Litera, 1942.

Az új takarékpénztári törvény. *Pénzügyi Szemle*, 14 April 1920, Vol. 2, No. 15, 5–6.

Demeter, Gábor – Radics, Zsolt 2007. A Dél- Felvidék gazdasági reintegrációjának gazdasági és társadalomföldrajzi vonatkozásai. *Limes*, Volume 20, Issue 2, 65–82.

Gaučík, Štefan 2004. A Pozsonyi I. Takarékbank hitelpolitikája és a városok (1919–1929). *Limes*, Volume 18, Issue 4, 59–82.

Gaučík, Štefan 2007. Bankstratégiák a dél-felvidéki területeken (1938–1941). *Limes*, Volume 20, Issue 2, 83–97.

Gaučík, Štefan 2008. *A jog erejével. A szlovákiai magyarság gazdasági önszerveződése 1918–1938. Dokumentumok*. Pozsony, Kalligram.

Gaučík, Štefan 2010. A határ mint gazdasági probléma. A Pozsonyi I. Takarékbank helyzete az első bécsi döntés után. In: Simon, Attila (ed.): *Visszacsatolás vagy megszállás? Szempontok az első bécsi döntés értelmezéséhez*. Balassagyarmat, Nógrád Megyei Levéltár – Selye János Egyetem, 140–150.

Gaučík, Štefan 2012. Sociálno-kultúrne a podporné stratégie finančných elít 1867–1945 (Bratislavská prvá sporiteľňa verzus Slovenská banka). In: Dudeková, Gabriela – Mannová, Elena (eds.): *Medzi provinciou a metropolou. Obraz Bratislavy v 19. a 20. storočí*. Bratislava, Historický ústav SAV, 161–177.

Gaučík, Štefan 2013. Predmet a kontext. Príspevok o interpretáciách dejín Prešporskej sporiteľne. *Bratislava. Zborník Múzea mesta Bratislavy*, Volume 25, 109–138.

Gaučík, Štefan 2014. Začleňovanie peňažných ústavov na južnom Slovensku do maďarského bankového systému v rokoch 1938–1945. In: Chudják, František – Hallon, Ľudovít – Leková, Andrea (eds.). *Centrálne bankovníctvo v stredoeurópskom priestore. Central Banking in Central Europe*. Bratislava, Národná banka Slovenska, 119–121.

Gaučík, Štefan 2019a. Integrácia mestského finančného trhu v Prešporku (1841–1867). Založenie Prešporskej sporiteľne a jej vývoj. *Bratislava, Zborník Múzea mesta Bratislavy*, Volume 31, 116–131.

Gaučík, Štefan 2019b. Kultúrne stratégie elít Prešporskej I. sporiteľne (1883–1918). In: Hudek, Adam – Šoltés, Peter (eds.): *Elity a kontraelity na Slovensku v 19. a 20. storočí. Kontinuity a diskontinuity*. Bratislava, VEDA, 190–214.

Gaučík, Štefan 2021a. Diferenciácia a špecializácia bánk v Prešporku v 60. a 70. rokoch 19. storočia. In: Hallon, Ľudovít – Duchoňová, Diana (eds.): *Od denára k euru. Fenomén peňazí v dejinách Slovenska*. Bratislava, Veda – Historický ústav Slovenskej akadémie vied, 181–202.

Gaučík, Štefan 2021b. Za hranicami filantropie. Prvé roky Prešporskej sporiteľne (1842–1849). *Historický časopis*, Volume 69, Issue 3, 439–464.

Gaučík, Štefan 2022. Činnosť Jednoty peňažných ústavov na Slovensku a Podkarpatskej Rusi v zrkadle československo-maďarských hospodárskych vzťahov (1919–1924). In: Kováč, Dušan – Hanula, Matej (eds.). *Z monarchie do republiky a z demokracie do totality. Spoločnosť na Slovensku od konca 19. storočia do roku 1945*. Bratislava, VEDA, vydavateľstvo SAV; Historický ústav SAV, 241–262.

Hallon, Ľudovít 2000. Expanzia slovenského finančného kapitálu v účastinných podnikoch v rokoch 1939–1944. *Historický časopis*, Volume 48, Issue 1, 75–98.

Hallon, Ľudovít 2006. Úloha komerčných bánk v arizácii na Slovensku 1939–1945. *Historický časopis*, 2006, Volume 54, Issue 4, 591–606.

Holec, Roman – Hallon, Ľudovít 2007. *Tatra banka v zrkadle dejín*. Bratislava, AEPress.

Horváth, Štefan – Valach, Ján 1975. *Peňažníctvo na Slovensku do roku 1918*. Bratislava, Alfa, Vydavateľstvo technickej a ekonomickej literatúry.

Janas, Karol 2004. K problematike hraničných sporov s Nemeckou ríšou v rokoch 1938–1943 v Bratislave a okolí. *Bratislava, Zborník Múzea mesta Bratislavy*, Volume 16, 121–128.

Janek, István 2006. Magyar-szlovák diplomáciai puhatolózások 1943-ban a két állam egymással szembeni szándékairól. *Regio*, Volume 17, Issue 3, 97–115.

Jócsik, Lajos 1944. *A Közép-Dunamedence közgazdasága*. Budapest, Magyar Élet.

Kačkovičová, Mária 2003. Menové reformy v 20. storočí. In: *Ľudia, peniaze, banky. Zborník z konferencie 6–8. novembra 2002*. Bratislava, Národná banka Slovenska, 385–405.

Kaposi, Zoltán 2002. *Magyarország gazdaságtörténete 1700–2000*. Budapest – Pécs, Dialóg Campus Kiadó.

Lacina, Vlastislav 2000. *Zlatá léta československého hospodářství (1918–1929)*. Praha, Historický ústav AV ČR.

Průcha, Václav 1974. *Hospodárske dejiny Československa v 19. a 20. storočí*. Bratislava, Pravda.

Ryník, Jozef 2003. Vplyv ministerstva financií na koncentráciu bánk na Slovensku v rokoch 1939–1945. In: *Ľudia, peniaze, banky. Zborník z konferencie 6–8. novembra 2002*. Bratislava, Národná banka Slovenska, 365–371.

Sallai, Gergely 2002. *Az első bécsi döntés*. Budapest, Osiris Kiadó.

Tönsmeyer, Tatjana 2003. *Das dritte Reich und Slowakei 1939–1945. Politischer Alltag zwischen Kooperation und Eigensinn*. Paderborn, Ferdinand Schöningh Verlag.

Zoltán Hopka

Soliman Inger, the Self-Proclaimed Hungarian Ruler of Somalia

Abstract: The present study explores the extraordinary life of Soliman Inger, a Hungarian adventurer who, throughout his life, claimed to be—among other things—a freedom fighter, an emir, and the ruler of the Somali population of East Africa. Inger's bold and outlandish claims about his identity; his supposed connections to powerful figures across Europe and Africa; his involvement in the political spheres of France, Britain, Hungary, and the Ottoman Empire; and his scandalous exploits all often made headlines. The study seeks to distinguish fact from fiction, uncovering the truths of Inger's life and to provide insight into the motivations behind his actions.

Keywords: Soliman Inger; Karl Inger; Africa; Sudan; Somalia

https://doi.org/10.61795/fssr.v27y2025i5.02

Introduction

Known by a variety of names in contemporary news reports, including Karl Inger,[1] Alexander Inger,[2] Solomon Singer,[3] Izidor Singer,[4] and Karl Singer,[5] the individual who would later become known throughout Hungary as Soliman Inger—often referred to as the "Viceroy of Somalia"—was a man of extravagant character and bold claims. Inger captured the imagination of the public, his larger-than-life persona and daring exploits frequently making headlines all across Europe. Soliman Inger claimed to be many things, a freedom fighter, an emir, and the sovereign of a distant African land, but how much of it was actually true? Was he truly a monarch or were his claims merely the product of his imagination?

1 *Aradi Közlöny*, 1935.08.07, Abesszíniába készül a bihormegyei származású, olvaszverő Inger Károly – Emir Suleyman Abdullah, 9.

2 *Magyarság*, 1935.08.04, Magyar katonatiszt a khedive seregében, 35.

3 *Szentesi Napló*, 1941.06.06, Tallózás, 3.

4 *Pesti Hírlap*, 1928.01.29, Az afrikai magyar királyok és alkirályok, 40.

5 *Typographia*, 1935.11.01, Afrika lelke, 3.

The Story of Inger Soliman, as Told by Contemporary Sources

The present chapter explores the life and career of Soliman Inger as pieced together from contemporary sources including press coverage, studies, and interviews. As the available sources often present conflicting information, the reconstruction of Inger's early life has been approached with caution. Instead of incorporating all the varying accounts—which could lead to confusion—the focus has been placed on those details that are most consistently reported across multiple sources.

Soliman Inger was believed to have been born in the Transylvanian town of Temesvár (present-day Timișoara, Romania). After completing four years of secondary education, he chose to embark on a military career. He attended a military academy for four years before being commissioned as a lieutenant in the Austro-Hungarian army. During his service in Bosnia and Herzegovina, he had frequent interactions with the local Turkish population and became fascinated by the enigmatic charm of the East. Ultimately, he relinquished his rank as an officer and traveled to Turkey, where he joined the Ottoman army.[6]

Inger's grandfather was described as a veteran of the Hungarian War of Independence of 1848–1849, who emigrated alongside Lajos Kossuth, the prominent leader of the failed revolution. He eventually settled down in Constantinople, where he joined the services of a certain Osman Pasha. As it was reported by the Hungarian press, this connection later played a crucial role in Inger's warm reception into the Ottoman army.[7]

As a soldier, Inger was posted to Egypt, where he converted to Islam and adopted the name Suleyman Inger Ibn Abdullah (Sanderson 1954: 25). During this time, Sudanese Muslims repeatedly rose in rebellion against the Khedivate of Egypt (an Ottoman tributary state) and later against British rule, striving to establish their independence. The rebellions, launched by the various Sudanese tribes, took years for the British to suppress, often at a significant cost. These uprisings would come to be remembered as the Mahdist War (1881–1899).[8] Inger too became entangled in these conflicts and embraced the ideology of the rebels, eventually making his way to Omdurman, the capital of the Mahdist State (Sanderson 1954: 25). Upon arrival, he announced himself

6 *Déli Hírlap*, 1940.08.24, Az egykori szomáli alkirály erdélyi származású volt és karrierjét a k. u. k. hadseregben szerezte, 9.

7 *Új Kelet*, 1935.08.29, Hogyan élt és hogyan halt meg Inger Szolimán az egykori Magyar hadnagy és szomáli alkirály, 2.

8 *Tolnai Világlapja*, 1931.09.09, Inger Szolimán Közös Tisztből egyiptomi katona, szudáni vezér, mohamedán főpap, aki osztrák-magyar gyarmatot akart alapítani Afrikában, 49.

as an Egyptian, stating that he was inspired to abandon his homeland and join the Mahdists out of admiration for their beliefs and their leader, the caliph. Through his fluency in Arabic, apparent sincerity, and demonstrated abilities, Inger earned the favor of the caliph, who granted him the title of emir (Bell 1937: 298).

This appointment marked the emergence of the figure who would be well known throughout Hungary as Emir Soliman Inger, the Viceroy of Somalia. In this role, he was supposedly responsible for overseeing the training and equipment of the Mahdist army. In 1887, he served as Chief of Staff to Hamdan Abu Anja and established a garrison near the town of Khasm al Qirba, where he fought alongside the Sudanese tribes. That same year, Inger took part in the Mahdist campaign against Ethiopia, which led to the sacking of Gondar. Sometime afterward—presumably following the Battle of Matammah in March 1889—Inger, who was described as tall, fair, and clean shaven, became the "king of an Abyssinian province." He claimed to have ruled for three years as "king," with his reign ending only when Emperor Menelik II reunited Ethiopia (Sanderson 1954: 24–25).

Picture 1. The young "emir" [9]

9 *Bihari Napló*, 2013.08.27., Inger Károly – Szulejmán Ibn Inger Abdullah, 7.

Inger's Own Account

In his publication, *Hungary's Colony in Somaliland*, Inger provides a detailed account of his life up to 1904. He stated that he was the grandson of "one of those great men" who had fought in the Hungarian War of Independence of 1848–1849 and who was forced to spend his final years in Ottoman lands.

Inger emphasized that from a young age, he was raised to become a soldier and eventually rose to the rank of officer in the Austro-Hungarian army. After fulfilling his military obligations, he chose to leave voluntarily, claiming that prolonged peace made his life dull and boring. He believed that the army already had a sufficient number of skilled officers to prepare the nation for potential future conflicts. Driven by a desire for a more meaningful life, he sought not only to serve his country but also to express his gratitude to the Muslim populations of the East, who had sheltered his grandfather and his fellow compatriots after their flight from Hungary. With these aspirations, he traveled to Africa, wishing to assist the Muslim tribes—whom he described as being left behind in terms of civilization-building—in their integration into the modern world. At the same time, he wished to open up the East's markets to Hungarian trade, contributing to both the region's development and Hungary's economic interests.

Inger claimed that he set out on his mission without any support. He joined a caravan and, as he put it, relied on the humility instilled in him through his upbringing to earn the trust of the natives. He claimed that he and the natives shared a common goal: to resist European domination, which was often masked as humanitarianism, while embracing civilization on their own terms and to "open their country to trade." Inger claimed that their opposition to British rule made them enemies of those who viewed British control as the only path to prosperity, despite "its frequent disregard for law and morality."

Inger also described his appointment as emir by the Mahdist caliph and the responsibilities entrusted to him by the Somali tribes. According to him, this designation resulted from the numerous European military raids that disrupted the lives of the native population. This prompted the tribes to seek leadership from someone who could guide them in their struggle for independence. Inger emphasized that he was given the task of overseeing the affairs of a country larger than Austria-Hungary, with a population of 5 to 6 million people. According to his account, the Somali people fully embraced his vision and followed his guidance with unwavering loyalty.

Inger also described how, in December of 1897, he wrote a letter to Hungarian Prime Minister Dezső Bánffy in which he outlined his and the Somali tribes' situation. He once again emphasized that the Somalis wished to establish commercial connections with

Hungary and were aiming for Hungary's political support. Inger assured Bánffy that the tribes were strong enough to defend themselves and that they only needed protection at sea. Inger claimed that the Hungarian government responded positively to his proposal, offering political support. Negotiations were held in Budapest, resulting in a secret 10-year commercial agreement. As part of the deal, 250,000 francs and ships loaded with goods were allocated to support Inger's mission.

During his journey to Africa, Inger passed through British-controlled Aden, accompanied by state representatives. However, his mission took an unexpected turn when some of his associates betrayed him. They fled the ship and informed the British authorities, falsely claiming that Inger had no ties to Hungary and that his true intent was to wage war against both Britain and Ethiopia.

To avoid issues with the British consul, Inger decided to head to French-controlled Djibouti, where he claimed to have been well-known and respected. Upon arrival, the French governor seized his belongings and supplies, citing accusations from Inger's associates regarding his hostile intentions. Despite this, the governor allowed him to remain in Djibouti while awaiting support from his home country. During his stay, Inger received no support from Budapest, and after nearly two months, the French governor informed him that the Hungarian government had not responded to the French inquiries either.

When he returned to Hungary, Inger discovered that public opinion had turned against him, with damaging reports circulating about his character. He tried to get to the bottom of the situation by reaching out to the Hungarian authorities but was placed under police surveillance. The Ministry of Foreign Affairs in Vienna had been involved in the case, and numerous legal actions were taken against him. Inger claimed that Foreign Minister Agenor Gołuchowski had opposed his enterprise from the start and that, as a result, the Hungarian government had effectively abandoned him.

Inger visited the editorial offices of several newspapers that had published defamatory and, in his view, false articles about him and his mission. One of these visits was to *Budapesti Hírlap*, where Inger engaged in a conversation with the editor-in-chief. During their conversation, the editor disclosed that the Hungarian government had directly ordered them to publish negative stories about Inger, with the goal of undermining his reputation and to create the public perception that the government had no ties to his mission. Similarly, Inger visited the offices of *Neue Freie Presse*, where the editors expressed sympathy for his situation. They explained that they were not fully informed about the specifics of his project and had merely reported the information given to them by the state (Inger 1904: 4–14).

Picture 2. Soliman Inger[10]

The Supposed Domain: Ogaden

Throughout his life, Inger repeatedly asserted that he was the true and legitimate ruler of the Somali people. In October 1898, *Pesti Napló* published a letter of his, written while he was stranded in Djibouti. In this letter, he claimed sovereignty over the Ogaden region of East Africa, a land under Ethiopian control but predominantly inhabited by Somalis.

In East Africa—as the emir writes in his letter—east of the Jubba River lies a vast country, the free homeland of the Somalis. Ogaden is the center of this fertile land. It has never been under foreign rule, neither Christian nor Muslim. This is the most beautiful

10 *Az Est*, 1935.08.28, Meghalt a legendás Inger Szolimán Emir, 3.

and most fertile part of Africa, many say: the paradise of Africa. [...] Ogaden is free and will never be under foreign yoke. This is my land, the center and foundation of all my plans. No matter what the newspapers write, no matter what the traitorous Europeans I recruited may say, my sheikhs remain steadfastly by my side. [...][11]

Inger's own account of how he came into possession of Ogaden changed several times throughout his life, his claim often being inconsistent and contradictory. On one occasion, he asserted that Emperor of Ethiopia Menelik II had granted the region to him as a personal gift in recognition of his bravery, a narrative that directly contradicted his earlier claims of being appointed as the viceroy of the entire region by the Mahdist caliph.[12] In some reports, it was even suggested that Inger intended to turn Ogaden into a Hungarian colony.[13]

Picture 3. The region of Ogaden[14]

11 *Pesti Napló*, 1898.10.19, Inger Szolimánról, 8.

12 *Amerikai Magyar Népszava Szabadság*, 1935.09.10, Inger Szolimán – szomáli alkirálya meghalt, 2.

13 *Ellenzék*, 1935.09.01, Hogyan élt Bihor-ban az abesszíniai Ogaden tartomány emirje, 10.

14 www.britannica.com/place/Ogaden; (last accessed 2025.04.11.)

Uncovering the Truth of Inger's Life

Soliman Inger's birth name was Karl, as confirmed by Austrian military records, which reference a Lieutenant Karl Inger born in Temesvár on September 18, 1868 (Sanderson 1954: 27). He was the son of a "master shoemaker"[15] and was possibly of Jewish origin (Szélinger 2008: 33). He attended the Infantry Cadet School in his hometown from 1883 to 1888, graduating with an overall grading of "very good." On September 19, 1885, he voluntarily enlisted in the 61st Infantry Regiment and later achieved the rank of second lieutenant in the 85th Infantry Regiment. These documented service records directly contradict such claims that he fought in Sudan during the Mahdist's Ethiopian campaign or that he was ever present at Omdurman, where he was allegedly granted the rank of emir.

In April 1892, he was granted a year's leave from the army, during which time he traveled to Morocco and learned the Arabic language, but as G. N. Sanderson wrote in his study: "there is no evidence at all that he visited or attempted to visit Sudan" and that "it is abundantly clear from Inger's statements that he was very imperfectly acquainted with Sudanese affairs" (Sanderson 1954: 27–28). Inger made a request to be transferred to the army reserve on December 5, 1894, indicating that he wished to settle down in Morocco. This request was approved on February 10, 1895, and he was posted to the reserve of the 39th Infantry Regiment (Sanderson 1954: 24–27). There have been claims even in contemporary reports that Inger in fact was merely an adventurer and who had never set foot in Sudan or Somalia. One author even expressed astonishment that "the tales of the pseudo-Muslim from Temesvár," Soliman Inger, were ever believed.[16]

There is indeed no documented evidence of anyone who could be identified as Emir Soliman Inger in contemporary European intelligence reports on Africa or in the caliph's official correspondence. If he had truly been a ruler or held a significant position in the Mahdist army, his name would have likely appeared in some shape or form. Even the British report *Foreigners and Foreign Missions in Abyssinia* makes no mention of anyone resembling Soliman Inger (Sanderson 1954: 27).

15 *Magyarország*, 1897.01.11, Az én szudáni tervem, 4.

16 *Pesti Napló,* 1897.12.12, Inger Szolimán mesél, 9.

Picture 4. Inger, sitting on his horse[17]

Arrest by the British

In contrast, extensive records exist on a certain Karl Inger, who was arrested by the Anglo-Egyptian authorities in the port town of Suakin, northeastern Sudan, in October 1896. These reports detail his arrest and the subsequent background investigation carried out by the authorities. In his study, Sanderson argues that based on the available evidence, Karl Inger and the so-called Emir Soliman Inger were, in fact, the same person. He further asserts that Inger was an impostor who neither held the title of emir nor had any contact with the Mahdist caliph. While official British reports suggested some connection between Inger and the French—possibly as a spy or an agent working against the British in some capacity (see later)—his exact relationship with them was unclear to them.

At the time of his arrest, Inger was described as an exhausted and terrified man, having wandered the plains for five days without shelter or food. He was also dressed in a Dervish jibbah, which, to the British, amounted to wearing the uniform of the enemy. According to the authorities, there was strong circumstantial evidence suggesting that he had been attempting to communicate with and assist Britain's regional enemies. While in custody, Inger made oral statements to the Court of Inquiry, which were transcribed and included his responses to the questions posed to him. In his testimony, Inger detailed his movements and explained his reasons for attempting to enter Sudan.

17 *Az Est*, 1935.08.29, Hogyan dajkálta Inger Szolimán emir Hailé Szelasszié́t, a négust, 5.

Sanderson notes that, facing serious charges, Inger seems to have made up his mind to finally tell the truth. Many of his confessions were incredibly harmful to his case, and one British report even described his statements as "lacking all common sense." Sanderson argues that it seems improbable that Inger would have intentionally fabricated such self-incriminating stories unless he was "completely insane." However, he raises doubts about whether Inger truly understood his own motivations (Sanderson 1954: 27–29).

Karl Inger's Written Statement Submitted to the Authorities

During his imprisonment, Inger submitted a detailed written statement to the Court of Inquiry. In it, he described his retirement from the Austro-Hungarian army, which he claimed was a voluntary and honorable discharge, dated February 10, 1895, in line with Austrian military records. Inger stated that he left Europe to enlist in the army of the Moroccan sultan. In preparation for this endeavor, he had started to learn Arabic in 1892 and practiced it by translating Austrian military training manuals. He also hoped that these translated documents would help him secure a military position in Morocco. These translations were later discovered among his belongings and were initially regarded as highly suspicious by his captors. Inger explained that his attempt to join the Moroccan army was unsuccessful: "I received support from nobody and failed in Morocco because the whole country was in an uproar as a result of Muley Hassan's death" (Sanderson 1954: 30).

In November 1895, Inger moved to Turkey hoping for a fresh start. He tried to enlist in the Ottoman army, but his efforts were thwarted when the Austro-Hungarian diplomatic authorities there refused to provide him the necessary recommendation. By the end of January 1896, he left Constantinople and relocated to Egypt, but the Austrian diplomatic officials in Cairo also refused to assist him. Left without a patron, Inger resorted to offering his translated drill manuals to various Egyptian War Offices, hoping to find someone willing to back him, ultimately in vain.

In February, he seized the opportunity to pursue his long-held desire of becoming a soldier of fortune by volunteering to join the Italian forces in Ethiopia. His passport for Eritrea was approved by an Italian diplomatic agent, and his application, along with his manuals, were forwarded to General Baratieri. Unable to wait for an official response, Inger took matters into his own hands and boarded an Italian transport ship bound for Massawa. Upon his arrival, Inger was informed that his paperwork had been lost in the chaos of the ongoing conflict. He then made his way to the town of Asmara and presented himself to General Baldissera, but Inger was later informed that they could not make use of him, as he was not an Italian citizen.

By the end of March, Inger departed Massawa for Djibouti, arriving on April 5, 1896. He had intended to venture into Ethiopia. When questioned of his motives, Inger claimed that he had been keeping a diary and planned to write a book about the war. All signs point to Inger wishing to offer his services to the Ethiopian emperor, possibly motivated by resentment towards the Italians. Nothing came of this plan, however, as he was informed that traveling to Ethiopia would require personal permission from the emperor, a process that could take two or three months. This delay seemed to dissuade him, and he later admitted that because the Italians had treated him with respect, he ultimately decided against writing to Menelik: "At Massawa I had been kindly received and treated as a comrade and a guest, and for that reason I could not write to the Negus." Inger then made his way back to Cairo, where he attempted once again to join the Egyptian army, though his efforts were unsuccessful (Sanderson 1954: 31–32).

The Peacemaker

During his time in Cairo, Inger developed an interest in Sudanese affairs and the Mahdist uprising. Recognizing the tension between Constantinople and London following the British occupation of Egypt, he devised a scheme to forge an alliance between France and the Ottoman Empire against Britain and to restore Ottoman control over to the region. His plan involved securing French support by offering them a portion of Sudanese territory in exchange, thereby enlisting the help of Britain's most formidable rival in this geopolitical maneuver (Eshete 1974: 1).

Inger believed that a peaceful resolution could be achieved between the Ottoman sultan and the Mahdist caliph: "[…] the Khalifa Abdullah should be recognized by the Sultan of Turkey as Sultan of Nubia […] It would be rendering the world a great service if one could bring about peace between Soudan and Egypt in this way" (Sanderson 1954: 32). In essence, he proposed that the Mahdist caliph should be permitted to govern the region under Ottoman overlordship.

Convinced that he was the right man for the job, Inger devised a plan with the assistance of a certain M. Ximenes, whom he had met in Cairo, and who claimed to have influential connections in Sudan. Their plan centered on Inger leading an expedition to Omdurman, the capital of the Mahdist State. Once there, he and Ximenes wanted to persuade the caliph to send a diplomatic delegation to Constantinople under their escort, in an effort to negotiate peace with the Ottoman sultan. Realizing that their ambitious plan required the backing of a major power, Inger and Ximenes sought support from France. Ximenes claimed to be in contact with officials in Paris, Constantinople, and even Russia, which further fueled Inger's hopes of securing international backing for their mission.

In the end, Ximenes failed to provide the promised funds or any tangible evidence of French support. Each time Inger pressed him for specifics, Ximenes offered only vague excuses. When Inger suggested traveling to Paris himself to secure backing, Ximenes responded coldly, claiming that such a move would likely ruin everything. As time passed, Inger's suspicions grew. Despite claiming to have influential connections, Ximenes showed signs of financial instability, struggling to pay for his hotel and wearing shabby clothes. This only deepened Inger's doubts about Ximenes' credibility. Eventually, Inger decided to travel to Paris on his own, lying to Ximenes, telling him that he was heading to Hungary (Sanderson 1954: 32–34).

Seeking French Support

In Paris, Inger's suspicions about Ximenes were confirmed: his partner had been driven solely by personal gain and lacked any genuine interest in brokering peace. Despite this revelation, Inger stayed focused on their original plan. After meeting with several individuals Ximenes had previously been negotiating with, Inger discovered that his partner had unsuccessfully sought 20,000 francs in aid from the French government. Undeterred, Inger decided to take control of the situation, submitting a proposal directly to the French Foreign Office which, according to him, offered a promise of assistance.

Inger met with representatives of the Colonial Ministry, who informed him that his proposal had been reviewed by the Ministry of Foreign Affairs. When the French asked him whether the caliph would even receive his expedition, Inger confidently assured them, though he later admitted in his statement to the British that this was a fabricated claim to advance the mission. In the end, Inger received only verbal encouragement and support but no financial assistance. Disheartened, he returned to Egypt in September.

By the summer of 1896, Inger had begun presenting himself as an envoy of the Mahdist caliph and adopted the name Suleyman. Upon his return to Egypt, he once again attempted to gain support for his project, contacting both his acquaintances and influential Egyptians. While his ideas were met with general approval, he was unable to gather any financial backing. At the same time, Inger was negotiating with M. Boutiron, the acting French Minister in Egypt, in hopes of securing both financial support and official credentials, as he had not receiver either while in Paris. Boutiron refused to provide any funding, even though Inger insisted: "I asked for no money for myself. My aim was holy: It was peace" (Sanderson 1954: 34–36).

Inger was confident that arriving in Omdurman with only three or four companions and delivering the message that Europe sought peace would be enough to convince the caliph. He only sought a formal letter of endorsement from the French to strengthen his case, but Boutiron refused to provide one, fearing it might fall into the wrong hands.

Nevertheless, Inger's efforts seemed to have attracted the attention of other officials in Paris, prompting Boutiron to assure Inger that he would consult with Paris.

During his questioning by the Court of Inquiry, when asked if Boutiron had ever received instructions from Paris, Inger responded, "Yes, he told me he had and wrote it to M. Barrière, the Editor of the Journal Officiel in Cairo. He said he had the authority to allow me to proceed to Djibouti, near Obock, into the Soudan" (Sanderson 1954: 36–37). On October 6, 1896, Inger boarded a ship at Suez, on which he met Bimbashi Fadli, a senior medical officer from Suakin. In his statement to the Court of Inquiry, Fadli revealed that Inger traveled incognito, alternating between "dressing as an Algerian" by day and posing as a European by night. Inger also held credentials to act as a correspondent for various French journals, though he later admitted that these were merely a form of disguise.

Upon arriving in Jeddah, Inger reached out to the French consul, who promptly visited him during his time in quarantine and brought him provisions. This visit was confirmed by Fadli's testimony, which stated that the French consul inquired about his whereabouts aboard the ship before making his way to the location where he had been taken. After his release from quarantine, Inger visited the French Consulate but was met with a cold reception and was told not to bother coming again. Stranded in Jeddah with no place to stay, Inger believed the change in the consul's attitude was a result of a letter from Boutiron, likely informing the consul that the Egyptian authorities were monitoring Inger, advising him to distance himself from the situation.

Inger claimed that his next step was to try and secure a Turkish passport with the assistance of the Austro-Hungarian consul in Jeddah. This was done in line with an Ottoman law that mandated that foreign travelers intending to enter the interior of the Ottoman Empire must apply for a passport through their respective diplomatic representatives, as the region was still considered de jure part of the Ottoman Empire at the time. Inger was unable to obtain the required passport and instead received a consular visa for Suakin (Sanderson 1954: 38–40).

Abandoning his original plan of reaching Omdurman via Djibouti and Ethiopia, Inger decided to take the route through the British-controlled port of Sudan. He left Jeddah and traveled to Suakin, where he was ultimately arrested by the British (Eshete 1974: 2).

Spared by Incompetence

A high-ranking British official described Inger as a misguided person "[...] possessed of a certain amount of military knowledge but devoid of all common sense." Another officer, expressing a less sympathetic view, characterized him as "a poor dreamer of unre-

alizable dreams, who is quite beneath our vengeance [...] the most dignified course would be to hand him over to his Consulate" (Sanderson 1954: 43).

After reviewing such reports, the British leadership concluded that it was not worth risking diplomatic friction with another great power over the punishment of an "impecunious and probably half-witted adventurer." It was decided that Inger would be sent to a European port, from which he would be free to travel to wherever he wished. Following consultations with Baron Heidler, the Austro-Hungarian minister in Cairo, arrangements were made for Inger to leave Suez aboard an Austrian steamship. He boarded the ship on December 12, 1896, and arrived in Trieste three days later. However, this was not the conclusion of Inger's journey, nor the final attempt he would make to enter Sudan (Sanderson 1954: 42–44).

Another Attempt at Reaching Sudan

Inger reappeared in Egypt on March 21, 1897, announcing to the *Courrier d'Égypte* his renewed determination to enter Sudan. British Intelligence swiftly took notice, assigning the same officials who had previously interrogated him to once again monitor his movements closely. This time Inger deliberately avoided Suakin and chose a different path, traveling through Djibouti and Ethiopia, likely counting on his French contacts for assistance. At the time, the governor of the French Somali Coast was M. Lagarde, whom Inger claimed to have met in Paris the previous summer. Instead of securing official backing, Inger once again acted impulsively. Described by Sanderson as a man who had little patience for bureaucracy, he chose to set off alone, repeating the same reckless patterns that had led to his earlier failures.

Fate once again intervened in Soliman Inger's journey when, on June 6, 1897, he unexpectedly encountered a British mission returning from Ethiopia. Despite previously assuring the British that he would abandon his quest to reach Sudan, Inger was once again attempting the journey. He tried to evade the British group, but this only heightened their suspicion, leading to Inger's identification and detention and another round of interrogation. Dressed in oriental attire, he was accompanied by two men, believed to be a Frenchman and a Greek.

By the end of 1897, Inger was in Budapest, where he wore down the Turkish consul-general with his plan to establish the Mahdist caliph as the sultan of Nubia under Ottoman suzerainty. The Turkish official, who described Inger as a combination of a madman and an adventurer, wanted nothing to do with him. In 1897, an article in *Pester Lloyd* denounced Inger, describing him as a lunatic who had been banished from Egypt (Sanderson 1954: 44–45; Eshete 1974: 1–2).

Later Endeavors

Never one to stay idle for long, the ever-ambitious Inger abandoned his earlier peace-making plans and turned his focus to commercial ventures. He was often seen around Budapest, wearing European clothing paired with a fez, "driving ostentatiously about town." He made bold claims, stating that the Somali sheikhs had recently chosen him as the king of a still uncolonized region of Somaliland—likely referring to Ogaden—and that the caliph was one of his closest friends and officers.

On several occasions, Inger expressed a deep concern for the economic welfare of his Somali "subjects" and attempted to capture the attention of the Hungarian Minister of Commerce and other influential figures, promoting his idea of establishing trade relations between Hungary and his "kingdom" (Sanderson 1954: 44).

Inger had approached several banks for loans, promising repayment in gold, ivory, ostrich feathers, and other exotic goods, claiming that these resources were already prepared for transport and were being brought to Djibouti by his Somali officers.

In July 1898, Inger once again arrived in Djibouti, this time posing as the chief interpreter of a so-called scientific expedition aboard an Austrian steamship. Officially, the expedition aimed to explore Mahdist Sudan, but Inger's true objective was far more ambitious. The 32-member party included 8–10 Austro-Hungarian ex-military men and 10 Muslim officers from the Constantinople military school. Inger's hidden goal was not exploration but the liberation of the Somali population from French, British, Italian and Ethiopian rule. How exactly he wished to achieve this goal is unclear, but he envisioned the founding of an independent Somali state under his leadership, with a modern army trained by the military personnel who accompanied him (Eshete 1974: 2–3). He had a stockpile of weapons aboard the ship, and his followers addressed him as "Your Highness" (Brockett 1970: 48).

Once the true nature of Inger's expedition was uncovered, the governor of Djibouti issued an expulsion order. At the same time, he was barred from entering Ethiopia as well. The mission fell into disarray, and letters from members of his party spoke of the severe hardship they faced, including hunger and destitution. Their situation worsened when a series of lawsuits led to their baggage and possessions being auctioned off, leaving them without the means to return to Europe (Eshete 1974: 3).

A report by Elek Kodolitsch, an engineer from Inger's expedition, was published in *Pesti Hírlap*. In it, Kodolitsch confirmed that Inger's objective was to establish a new state that would become the protectorate of Austria-Hungary, effectively turning the region into an Austro-Hungarian colony. Kodolitsch revealed that Inger had granted each mem-

ber of the expedition a military rank, and before their departure, had commissioned a Viennese tailor to design military uniforms for them. The hilts of their swords and the buttons of their shirts were embroidered with a crescent moon and the letter "S," symbolizing Soliman. Additionally, they carried a black flag adorned with quotes from the Quran.[18]

To lend some credence to Inger's claims that he had indeed been in negotiations with the Hungarian government, it is noteworthy that Lajos Hell was also part of his expedition, presenting himself as an official representative of the state. Hell later recounted that his travel expenses were covered by the Hungarian Ministry of Commerce. However, over the course of their journey, he came to the realization that Inger was, in fact, an impostor and a liar who held no real authority or influence in Somalia. While they were sailing across the Adriatic Sea, Hell confronted Inger and informed him of his intention to withdraw from the expedition upon their arrival. According to Hell's account, Inger desperately begged him to stay.[19]

Inger resurfaced in Djibouti once again in 1900, only to be arrested on charges of fraud arising from his previous visit. Convicted and sentenced to two years in prison, he was eventually expelled from the territory in October 1900, before serving his full sentence. Despite his repeated failures, Inger launched one final scheme in March 1902, this time attempting to gain British support. He presented himself as the key to ending the Somali resistance against British rule, which had begun in 1899 under the leadership of the infamous "Mad Mullah." Inger boldly asserted that the rebel leader was his most loyal and devoted follower, claiming that, if allowed entry into British Somaliland, he could convince him to abandon his fight. Dismissing Inger as an "utterly unscrupulous" liar, British officials refused to take him seriously. Nevertheless, a few desperate individuals entertained the idea of using his services, if only out of sheer frustration with the ongoing conflict (Eshete 1974: 2–4).

A Potential Alliance with the British

On May 7, 1903, *The Times* reported that Inger had issued a lengthy appeal to the British government, boldly offering to end the conflict in Somaliland within 10 days. While many dismissed him as a fraud, some within the Foreign Office—most notably Lord Lansdowne and Lord Cranborne—were desperate enough to entertain the possi-

18 *Pesti Hírlap*, 1898.09.29, Inger Szolimán expediciója, 7.

19 *Pécsi Napló*, 1898.08.20, Inger Szolimán – szédelgő, 11.

bility of using him. They sought information about Inger, debating whether he had ever been to Somaliland or held any real influence there.

One individual who wholeheartedly believed in Inger's grandiose claims was a British adventurer and businessman, Thomson Lyon. Convinced of Inger's legitimacy, Lyon informed Cranborne that Inger was not only willing to bring Somaliland under British suzerainty but was also prepared to become a loyal vassal of the Crown. Given the dire situation in Somaliland, Cranborne did not wish to dismiss any possibility for peace. He even considered the idea of Inger ruling the hinterlands, despite previously describing him as a "scoundrel." Lansdowne, too, saw a slim possibility that Inger could broker peace, and as a result, a British military attaché in Vienna was instructed to interview him—though as informally and discreetly as possible—to assess whether he had any real influence in the region.

Between May 16 and May 21, Inger met with the British military attaché in Vienna three times, making further claims that the Somali rebels would immediately cease their hostilities at his orders. As for the terms of peace, he stated that his "people" desired nothing more than British protection and the freedom to trade, while he himself wished to be recognized as the ruler of the inland Somali territories. For many British officials, these demands were so absurd that they dismissed the entire proposal outright. However, Cranborne, along with several influential figures—including the Director-General of Military Intelligence—managed to persuade the cabinet that Inger might still be of use. A telegram was even sent inquiring whether he was ready to depart for Somaliland immediately. Inger not only affirmed his readiness but also declared that he would finance his own journey.

Somehow, he had convinced just enough people that he wielded real influence in Somaliland. With the British Cabinet reluctant to prolong hostilities and lacking any viable alternatives, they decided to proceed with the plan. Thomson Lyon was to be appointed as the intermediary, relaying the British government's terms to Inger, who in turn was expected to pass them along to the rebels. Lord Lansdowne, acknowledging the potential for international ridicule, remained pragmatic, stating that so long as Prime Minister Balfour raised no objections, he saw no reason not to move forward with the plan.

Although the prime minister expressed no opinion on the matter, opposition to the idea of using Inger steadily grew. Influential politicians voiced strong objections, and those who had encountered him in the past—particularly during his ventures in Egypt—urged the Foreign Office to sever all ties with him. Some argued that it was absurd for a man of his background, who had converted to Islam so recently, to claim any authority over

the Mad Mullah. Faced with mounting resistance and increasing doubts about his credibility, the British government was ultimately persuaded to abandon the plan.

Despite this setback, Inger remained determined and informed officials that he would proceed with his intervention in Somaliland regardless, claiming his goal was to restore order and peace. Concerned about his activities, British authorities requested the Budapest police to monitor his movements.

True to his word, reports surfaced in late December that Inger had arrived on the Red Sea coast of Yemen. By this time, however, British military efforts in Somaliland had gained ground, and an order was issued to prevent Inger from entering the territory. The War Office even sought the cooperation of the Ottoman authorities to have him arrested, but by then, Inger had already been expelled.

From Yemen, Inger traveled to Jeddah, where the British consul promptly arranged for him to be put on a ship bound for Suez. Meanwhile, international efforts to block his interference intensified: Ethiopian authorities agreed to bar his entry, the French pledged to keep him out of Djibouti, and Austro-Hungarian officials in Cairo ensured that he would not be allowed to travel southward from Egypt.

Faced with an insurmountable wall of international opposition, Inger had no choice but to return to Budapest. There, he set about recording the story of his life from his own perspective, an account detailed in a previous chapter. (Brockett 1970: 51–54).

Personal Life

Inger returned to Hungary and settled down permanently to live the life of a landed gentleman in Transylvania. The source of his wealth remained a mystery, as it was unclear how he managed to purchase a castle in the town of Kimpány (present-day Câmpani de Pomezeu, Romania), especially given that his adventurous activities appeared to be financially unprofitable. One possible explanation is that his family's shoemaking business operated on an industrial scale, and Inger may have inherited a substantial fortune (Sanderson 1954: 47).

On June 11, 1904, it was reported:

> Soliman Inger, known for his Somali expedition, has now completely given up on conquering distant worlds. His much-troubled ship has finally docked in the peaceful harbor of marriage. At noon today, before civil registrar Antal Pettykó, he entered into a lifelong alliance with Henny Tina, a stunning Dutch woman born in Batavia. The marriage was wit-

> nessed by members of parliament Gábor Ugrón and Márton Lovászy. Registrar Pettykó delivered a beautiful speech to the newlyweds.[20]

However, the path to marriage was not without its complications. The civil registrar imposed several obstacles due to Inger's faith, as Islam was not officially recognized in Hungary at the time. To navigate these challenges, Inger formally converted to Roman Catholicism and declared himself a landowner by profession. Once the marriage was legally finalized, he swiftly sought to amend the official records. As reported in the press

> Inger visited the Budapest mayor's office today, submitting an appeal for corrections to the marriage register. He presented official documents proving his status as an emir of the Sultan, arguing that listing his religion as Roman Catholic would severely disadvantage him.[21]

Inger and his wife spent only a few short months together in Transylvania before parting ways. She, along with their son Norbert—also referred to in some accounts as Nureddin[22]—then settled in Brussels, Belgium.[23] In 1907, it was reported that Inger had become an advocate for the establishment of Hungarian overseas colonies. He proposed that Hungary should, through diplomacy or warfare, secure a colony in the Far East or South Africa, thus preventing large-scale emigration to America. Inger believed that these colonies would help keep the emigrated Hungarian communities united and generate economic profit for Hungary.[24]

The outbreak of World War I prompted Inger to offer his services to his country. On September 2, 1914, he sent a letter to the War Ministry, signing it as "Emir Suleyman ibn Inger Abdullah." In this letter, he emphasized his past as a Mahdist emir—a narrative he appeared to genuinely believe by this point, as noted by Sanderson—and highlighted his military experience and Muslim connections. He proposed leading military operations in the Balkans or, alternatively, the Caucasus, where he claimed to have close ties with influential figures, such as Turkish Commander-in-Chief Izzet Pasha. Inger, who by this time lived as a recluse in his castle, was describe to the ministry as "a religious enthusiast with exalted ideals," and his offer was ignored (Sanderson 1954: 49–50).

20 *Budapesti Napló*, 1904.06.11., Inger Szolimán esküvője, 5.

21 *Szeged és Vidéke*, 1904.08.10., Inger Szolimán házassága, 8.

22 *Erdélyi Hírlap*, 1935.09.08., Inger Szolimán a házvezetőnőjére hagyta vagyonának nagyobb részét, 4.

23 *Ellenőr*, 1937.11.30., Eladták Inger Szuleyman kastélyát, 18.

24 *Felsőmagyarország*, 1907.06.20., Gyarmatot a magyarnak, 2.

The Prophet of a New Faith

In the summer of 1917, *Pesti Napló* reported that Inger had been fined for promoting a "new religion." The article described how Inger, who had been living in quiet seclusion for years by now, became the leader of a new faith and began distributing pamphlets to spread its teachings across the country. According to the report, he held weekly open-air services on his private estate, which attracted many locals from the surrounding area. For a while, he was able to continue with these gatherings undisturbed, until the gendarmerie reported his "cult" to the chief magistrate. When questioned, members of his flock testified that they were simply praying for world peace. Inger claimed that God had personally appeared to him and commanded him to spread his word. He never sought donations from his followers, and he freely shared the teachings of his faith, which was rooted in the Quran. In the end, Inger was fined 20 korona for holding unauthorized gatherings. A notary had observed one of his services and reported that there were no formal ceremonies. Inger simply preached peace and love in the name of God.[25]

Inger also documented the principles of his new faith in a book titled *Die Freundenbotschaft* [Eng. The Friend Message], in which he offered a critique of materialism. He emphasized the destructive nature of envy and selfishness, while also denouncing the consumption of alcohol and tobacco. However, as one article wryly noted, Inger himself had not been able to abstain from cigars. The fundamental tenet of his religious doctrine centered on the purification of the individual. Even the Greek Orthodox bishop of Arad, János Papp, issued a formal warning to the public, urging caution regarding this emerging religious movement.[26]

According to the November 2, 1920, edition of *Nemzeti Újság*, Inger persisted with his prophetic activities and had begun promoting his teachings in Budapest.[27] After his lectures in the Hungarian capital, he planned to take his efforts to Berlin, Paris, London, and New York.[28] Inger stated in 1921 that he was no longer a Muslim, as he believed that this religion "stood in the way of progress," although he continued to use his adopted name for the rest of his life.[29]

25 *Kecskemét Lapok*, 1917.05.17., Uj vallás Kimpányon, 2.; *Pesti Napló*, 1917.08.11., Inger Szolimánt elítélték új vallásterjesztésért, 10.; *Kecskeméti Lapok*, 1917.08.15., Inger Szolimánt megbüntették uj vallás terjesztéseért, 3.

26 *Világ*, 1918.05.30., A kimpányi hegyen megjelent az Úr, 5.

27 *Nemzeti Ujság*, 1920.11.21., Inger Szolimán uj hitet hirdet, 4.

28 *Magyarország*, 1920.11.23., Inger Szolimán Abdullah: Isten küldöttje, 3.

29 *Tükör*, 1921.05.26., Inger Szolimán az igazhitüség hirdetője, 25.

In August 1923, *Temesvári Hírlap* published a new statement from Inger, in which he described his religion as one that advocated for the renewal of humanity and emphasized the need to reconcile the conflicts between science, religion, and moral life. He stressed the importance of eliminating racial and religious divisions among people, promoting instead a profound and all-encompassing sense of human love and solidarity:

> The principle of divine authority has collapsed and must be restored. That is my mission. The divine commandment says, "Thou shalt not steal," yet people still take what is not theirs. It says, "Thou shalt not kill," yet there are still murderers. We must eliminate the misconceptions that have taken root in religious life. The true believers, reject the concept of creation as it has been presented to us in the Bible.

Inger described the Carpathian Basin as God's chosen land, where, in his belief, distinctions such as majority and minority ethnicities should not exist, as only human beings inhabit the land. He emphasized that the people of this land are destined to fulfill the Gospel's message by dismantling the divisions imposed by science, religion, and racial distinctions. According to him, in this "chosen land," there are no Jews, Germans, Slovaks, Romanians, or Hungarians, only individuals who mistakenly identify with these outdated ethnic labels. He believed that once these people attain a higher level of ethical development through divine grace, they will recognize each other as brothers and live together in peace and harmony.[30]

Later Life

On September 13, 1922, an article in the *Brassói Lapok* reported the discovery of gold, silver, and high-quality coal deposits on Inger's estate in Kimpány. Inger held the mining rights to the discovered deposits and had established a joint-stock company to oversee the operation.[31] By December of the same year, the mine had already begun operations. The revealed wealth of the four-kilometer-long deposit exceeded all expectations. Miners, along with their families, relocated to the area and formed a mining colony, presumably yielding a considerable profit for Inger.[32]

Throughout the 1920s, Soliman Inger continued to make appearances in various newspaper outlets. In 1926, several newspapers, including *Magyarság* and *Aradi Közlöny*, reported on a newly published Hungarian novel by Count Lajos Königsegg titled *Soliman ben Darja*. Set in the wilds of Africa, the novel chronicles the adventures of a

30 *Temesvári Hírlap*, 1923.08.17., Inger Szolimán Temesvárott, 2.

31 *Brassói Lapok*, 1922.09.13., Hirek, 4.

32 *Prágai Magyar Hirlap*, 1922.12.20., Megnyitották a kimpányi bányákat, 7.

Hungarian adventurer. The protagonist was widely believed to be inspired by Inger, whose life closely resembled that of the novel's main character.[33]

Besides being a prophet of a new religion, having his life story serve as a compelling reading material for many years, and inspiring the protagonist of a novel, Inger also engaged in political discourse, particularly regarding the Jewish question. In 1928, he published a 16-page pamphlet titled *The Jewish Question*. In this work, he argued that the Jewish people do not exist as a distinct ethnicity and that European Jews are merely members of a religious community, separated by an unbridgeable gap from the "Palestinian racial Semites." According to him, what distinguishes European Jews from other peoples is solely their way of life. He believed that it would be preferable for Jews to abandon their isolation and assimilate into a community aligned with progress, the teachings of enlightenment, and the religious sentiments of a modern, free-thinking individual. However, he also posed a fundamental question: Can anyone be expected to abandon their faith and undergo such a transformation? In response to Inger, an article examining his writings concluded by acknowledging that the idea of mass Jewish conversion had been proposed numerous times before, only to fail each time. The author stated that Inger's pamphlet still warranted attention, particularly for those who envisioned a brighter future for humanity.[34]

Inger wrote critically about Zionism, questioning its feasibility and consequences. He believed that while the movement arose from a genuine desire, attempting to revive an ancient Jewish nation was an unrealistic goal. Inger argued that a small group of Jewish immigrants could not recreate a lost nation in a land where Jews and Arabs coexisted peacefully. He also criticized Zionism's reliance on British support. He viewed the movement as a costly illusion that would bring hardship and persecution to the settlers. Additionally, he doubted that a national state could be built solely on religious unity. Inger ultimately believed that Zionism served British colonial interests, not Jewish prosperity, and warned of the suffering it would bring.[35]

Inger continued his publicist work with two new books, *Örömhír* [Eng. Good News] and *Revízió* [Eng. Revision]. In 1930, he sent a copy of *Revízió* to the editors of *Új Kelet* [Eng. New East], who provided a brief introduction, highlighting its central theme: universal moral renewal. In these works, Inger argued that Christian culture had declined and that true renewal would come from the East. He claimed that "Western Aryans"

33 *Magyarság*, 1926.07.18., A Magyar Ossendowski Afrikában, 8.; *Aradi Közlöny*, 1926.08.05., Regényt írt egy volt aradi földbirtokos, 7.

34 *Aradi Közlöny*, 1928.02.23., Az egykori szomáli alkirály meg akarja oldani a zsidókérdést, 10.

35 *Ellenzék*, 1929.09.26., Inger Szolimán levelet ir Palesztináról, 4.

had exhausted themselves and were no longer fit for this new historical mission. The editors found little merit in Inger's works, noting that his life was more intriguing than his writings. Nevertheless, Inger had no desire to write his life story, considering it less important than sharing and promoting his views.[36]

Final Years

In one of his final interviews before his death, Inger once again spun a web of extraordinary and entirely fabricated tales from his time in Africa. He claimed that during the Mahdist War, after engaging in battle with British forces, he was forced to retreat due to the enemy's overwhelming strength. According to him, he fled to Ethiopia, where he allegedly met Emperor Menelik II in the capital, Addis Ababa. He described a surreal encounter in which Menelik greeted him "half-naked" in his tent and expressed his frustration over court intrigues. Inger also claimed to have encountered a young Ras Tafari, who was only four years old at the time. He recalled playing with the child and expressed his astonishment that the boy later grew up to become Emperor Haile Selassie I. He also alleged that, during this time, with Italian forces amassing at the border, the Mahdist caliph had instructed him to remain in Ethiopia as a military advisor, offering guidance to Menelik, which he claimed was pivotal in the defeat of the invaders.[37]

Decades later, upon hearing news of Mussolini's forces attacking Ethiopia, Inger voiced his frustration, stating:

> Abyssinia belongs neither to Haile Selassie nor to Mussolini. Forty years ago, the people of Ethiopia swore loyalty to me in Ogaden under the Prophet's flag. Only I can end this war, by going there with flag in hand and making that province a Hungarian colony.[38]

Inger expressed his desire to travel to Africa one last time, with various newspapers reporting that, despite his worsening health, he was eager to fight the Italians.[39]

Soliman Inger passed away on August 25, 1935, due to a brain hemorrhage.[40]

36 *Új Kelet*, 1930.11.07., Emir Szuleyman ibn Inger Abdullah könyvet irt, 5.

37 *Az Est*, 1935.08.29., Hogyan dajkálta Inger Szolimán emir Hailé Szelassziét, a négust, 5.

38 *Utunk*, 1957.06.27., Egy vekkeróra igaz története, 3.

39 *Új Kelet*, 1935.08.09., Abesszíniába keszül a hires Inger Szolimán, 5.; *Az Est*, 1935.08.10., Az agg Inger Szolimán Abesszíniába, 9.; *Felsőmagyarországi Reggeli Hirlap*, 1935.08.10., Hirek, 6.

40 *Az Est*, 1935.08.28., Meghalt a legendás Inger Szolimán Emir, 3.

Picture 5. Inger in his later years[41]

At the time of his death, he had accumulated a considerable fortune, mainly consisting of his estate and castle in Kimpány. Most of this wealth was bequeathed to Piroska Unghy, his housekeeper, who had lived with him for 28 years and who cared for him during his final years.[42] A few years after his death, his son, sister, and former housekeeper reached an agreement regarding his wealth, and together they sold Inger's castle, which was eventually demolished.[43] Thus ended the adventurous tale of Soliman Inger.

Conclusions

As Balázs Szélinger noted in his dissertation, Soliman Inger was far more than a mere adventurer; he was, in all likelihood, a man grappling with profound psychological turmoil. Sanderson, for his part, described him as a self-dramatizing romantic.
Soliman Inger's story is as puzzling as it is fascinating. He stands out as a deeply complex—and in many ways, tragic—figure so caught up in his own grandiose claims that by the end of his life he may have lost track of who he truly was. While his statements were often full of contradictions, dismissing him as just an opportunistic adventurer or conman would be an oversimplification of his character. He seemed to possess a genuine

41 *Bihari Napló*, 2013.08.27., Inger Károly – Szulejmán Ibn Inger Abdullah, 7.

42 *Erdélyi Hirlap*, 1935.09.08., Inger Szolimán házvezetőnőjére hagyta vagyonának nagyobb részét, 4.

43 *Ellenzék*, 1938.04.29., Lebontották Inger Szolimán kastélyát, 6.

sense of conviction and purpose. His tireless efforts and emotionally charged appeals suggest a sincere, albeit hard to understand attachment—one might even call it an obsession—with Africa and the Somali people.

Inger's enigmatic persona, coupled with his supposed ties to influential individuals, earned him both admiration and skepticism. He appears to have been driven by a heartfelt desire to make a difference, to leave his mark on history, and to be remembered as someone of significance. In pursuit of these ambitions, he seems to have deluded himself and fallen prey to self-deception. Revered by some and dismissed by others, his life straddled the fine line between the extraordinary and the absurd.

Contemporary press sources

Amerikai Magyar Népszava Szabadság (1935)
Aradi Közlöny (1926, 1928, 1935)
Az Est (1935)
Bihari Napló (2013)
Brassói Lapok (1922)
Budapesti Napló (1904)
Déli Hírlap (1940)
Ellenőr (1937)
Ellenzék (1929, 1935)
Erdélyi Hírlap (1935)
Felsőmagyarország (1907)
Felsőmagyarországi Reggeli Hírlap (1935)
Kecskeméti Lapok (1917)
Magyarország (1897, 1920)
Magyarság (1926, 1935)
Nemzeti Ujság – 1920
Pesti Hírlap (1928)
Pesti Napló (1897, 1898, 1917)
Pécsi Napló (1898)
Prágai Magyar Hírlap (1922)
Szentesi Napló (1941)
Szeged és Vidéke (1904)
Temesvári Hírlap (1923)
Tolnai Világlapja (1931)
Tükör (1921)
Typographia (1935)
Új Kelet (1930, 1935)
Utunk (1935)
Világ (1918)

Literature

Bell, G. W. 1937. Suleiman Hariga. *Sudan Notes and Records*, Vol. 20, No. 2, 298.

Brockett, Andrew M. 1970. Emir Suleyman Ibn Inger Abdullah – A further episode. *Sudan Notes and Records*, Vol. 51, 48–54.

Eshete, Aleme 1974. European Political Adventurers in Ethiopia at the Turn of the 20th Century. *Journal of Ethiopian Studies*, Vol. 12, No. 1, 1–4.

Inger, Suleyman 1904. *Magyarország gyarmata Szomáliföldön* [Hungary's Colony in Somaliland]. Budapest, A Pesti Lloyd-Társulat Könyvnyomdája, 4–14.

Sanderson, G. N. 1954. "Emir Suleyman Ibn Inger Abdullah": An episode in the Anglo-French conflict on the Upper Nile 1896–1898. *Sudan Notes and Records*, Vol. 35, No. 1, 25–34.

Szélinger, Balázs 2008. *Magyarország és Etiópia – Formális és informális kapcsolatok a 19. század második felétől a II. világháborúig*. Szeged, Szegedi Tudományegyetem Bölcsészettudományi Kar, 33–39.

Vajda, Barnabás 2018. Memory of the First World War - A "resurrection" of a Prisoners of War Cemetery. In: Ieda, Osamu–Nagayo, Susumu (eds.): *Transboundary Symbiosis over the Danube III*. Waseda University Press, Tokyo, Japan, 59–68.

Vajda, Barnabás 2020. *Történelemdidaktika és történelemtankönyv-kutatás*. Selye János Egyetem, Tanárképző Kar, Komárom, 2020.

Vajda, Barnabás 2021. Teaching Cold War in the post-Cold War era. *International Journal of Research on History Didactics, History Education and History Culture (JHEC) - Yearbook of the International Society for History Didactics,* Wochenschau Verlag, Frankfurt, Volume 42, 13–26.

László Kojanitz – Barnabás Vajda

On the Qualitative Aspects of the Hungarian School-Leaving Exam in History

Abstract: The Hungarian Core Curriculum and school-leaving exam requirements in history emphasize the importance of students' familiarity with the sources, procedures, and methods of historical research, as well as the need to deepen students' understanding of second-order concepts, such as historical sources, facts and evidence, interpretations, and historical perspectives. This study investigates (1) to what extent the 2023 advanced level school-leaving exam includes tasks suitable for assessing source analysis skills and (2) what level of source analysis skills the exam demands from students. In our research, we found that the school-leaving exam test we analyzed occupies a position somewhere in the middle of a long journey: it is much more than a simple, knowledge-based test assessing students' memory, yet it is still far from being an ideal school-leaving exam that effectively incorporates higher-order historical thinking operations.

Keywords: school-leaving exam; cognitive level; use of sources; procedural knowledge; critical thinking; task-solving activities; writing skills

*B. Vajda's ORCID: 0000-0003-0282-1956

https://doi.org/10.61795/fssr.v27y2025i5.03

1. The Contextualization of the Exams

1.1 The Hungarian Education System in General

In Hungary, education is compulsory between the ages of 3 and 16. Generally, the system of educational institutions consists of kindergartens, elementary schools, upper secondary grammar schools, upper secondary vocational grammar schools, vocational special schools, and skills development schools. The durations of the programs of the International Standard Classification of Education are as follows: ISCED 0 is three years; ISCED 1 is four years; ISCED 2 is four years; and ISCED 3 is two to five years.

Hungarian public education institutions can be established and maintained by the state, minority self-governments, churches as legal persons, religious associations, natural persons, or other organizations. In the case of public education, central educa-

tional governance and the supervision fall under the auspices of the Ministry of Interior. Central regulation is based on the National Core Curriculum issued by the government, which also regulates the two lower layers of education: the Framework Curriculum (FC) and the local curriculum.

The Hungarian National Core Curriculum (NCC) is a strategic document that is mandatory to follow for all educational institutions and stakeholders. It provides the ideological, theoretical, and philosophical foundations for the main areas of knowledge to be conveyed. The NCC is the core document regulating Hungarian school education. It provides the normative basis for the preparation of the FCs and local curricula, the content of subjects, examination requirements, textbooks, and other teaching aids. The NCC conveys common national values and contributes to the preservation of national traditions while supporting the development of a sense of national identity. In addition, it determines the content and the developmental requirements that must be fulfilled during the various educational phases. Historical topics are arranged chronologically, but certain longitudinal themes recur each year. These include education; life in villages and towns; diseases and epidemics; rulers and statesmen; peace, wars, and warfare; the effects of environmental transformation; and the influence and coexistence of peoples and religions.

The FCs are based on the NCC. They take into consideration certain similarities and differences between different types of schools. Thus, specific overall curricula are developed to determine the contextual regulatory frameworks of the four-grade (grades 9–12) and six-grade (grades 7–12) upper secondary grammar schools.

The local curricula have to be developed by individual communities of school teachers. This means that school-level content regulation documents are adopted by the teaching staff in the field and are subsequently approved by the school maintainers after consultation with experts.

1.2 Goals and Purposes of History Education

The Hungarian NCC and the FCs serve as the foundation for the school-leaving exam (in Hungarian *érettségi vizsga*, sometimes in English also called the High School Graduation Exam (or Matura exam). The aim of history teaching is to arouse young people's interest in the past and provide a variety of evidence demonstrating that knowledge of the past also serves as a means of gaining a true understanding of the present and preparing for the future. Moreover, history teaching must develop and strengthen attitudes and skills necessary for conscious participation in public life. It should also provide students with personal experiences that foster a sense of belonging to their family, place of residence, nation, Europe, and human civilization. Additionally, it must

foster an understanding of the forces that have shaped events and processes in the past, the fate of previous generations, their achievements, the evolution of their living conditions, and the ideas and beliefs that defined each age, as well as their origins and the reasons for their formation.
In the study of history, the NCC and FCs emphasize the importance of familiarity with the sources, procedures, and methods of historical research, as well as the need to deepen students' understanding of second-order concepts that foster historical knowledge and interpretation (e.g., historical time, change and continuity, causes and consequences, historical sources, facts and evidence, interpretation, significance, and historical perspective)—a key aspect from the perspective of our research.
The Hungarian NCC designates the overall structure of the development requirements, and it consists of the following parts: Acquiring Knowledge and Learning; Critical Thinking; Communication; and Orientation in Time and Space.

1.3 The School Leaving Exam in History

Hungary is a country where history is a compulsory subject from the 5th grade (11-year-old pupils) to the 12th grade (18-year-old pupils) in all elementary schools, upper secondary grammar schools, and upper secondary vocational grammar schools. The average number of lessons at the elementary and upper secondary level is between two and three per week. Teachers in the upper secondary level are required to hold a master's degree in history education. Students who take school leaving exams in history come basically from two types of schools. For students in upper secondary grammar schools that provide general education lasting four, six, or eight years, the school-leaving exam is taken as an admission test to higher education institutions. Students in upper secondary vocational grammar schools are prepared for the school-leaving examination and vocational (practical) examination, enabling them to either continue their studies at a higher education institution or start a working career.

Since 2005, Hungary has run a dual-level examination system. The intermediate-level exam (*Középszintű érettségi*) is the standard-level exam that is mandatory for most students. It assesses basic knowledge and skills required for graduation and further education. The advanced-level exam (*Emelt szintű érettségi*), a higher-level exam, is primarily taken by students applying to universities or specific programs requiring deeper subject knowledge, and it is often required for competitive degree programs (e.g., law, medicine, engineering). Both levels include a written and oral exam. Students must complete five mandatory subjects: Hungarian language and literature, mathematics, history, foreign language (usually English or German), and one elective subject (e.g., biology, physics, geography, art). Optional subjects can be added to improve university admission scores. Each exam is scored out of 100 points. To pass, students need at least 25% in each subject. Advanced-level exams weigh in more in university admission

(e.g., 1.5 times the points of intermediate exams). Points for university admission are calculated based on grades from the school-leaving exam and grades earned during high school. Advanced-level exams can add extra points to the final score, especially for competitive programs. This dual-level system allows students to tailor their exams to their future goals by either fulfilling basic graduation requirements or preparing for higher education. In organizational terms, intermediate-level exams can be taken by students at their own schools. By contrast, advanced-level exams are held in centrally designated secondary schools and are supervised and assessed by teachers from other institutions. In 2023, 68,131 students took the school-leaving history exam at the intermediate level, and 7,025 students took it at advanced level.

At both exam levels in history, the written test consists of two parts. The first part contains 12 short-answer questions, while the second part includes essay questions: one short task on world history, one long task on Hungarian history, and one complex task. Students must choose three out of six essay questions offered to them. At the intermediate level, students have 240 minutes (100 minutes for the first part and 140 minutes for the second part) to complete the tasks. At the advanced level, students have 300 minutes in total (125 minutes are allocated for the short-answer questions, and 175 minutes are reserved for writing the three essays in the second part). Students can choose whether they take the exam in Hungarian or one of the following 10 other languages: English, French, Croatian, German, Italian, Russian, Romanian, Spanish, Serbian, or Slovak. After the written exams, there is also an oral part at both the intermediate and advanced levels. Students have 15 minutes to present a topic using a set of questions and sources provided by the examiners. This task aims to assess students' knowledge, skills, and abilities related to historical thinking, interpretation, and communication. It evaluates their ability to use evidence to support arguments and conclusions. The set of questions must be prepared according to the topics prescribed for the oral exam. The question can be a presentation of a historical problem of a smaller period, an overview of a more complex problem, or one that spans several historical periods. The wording of the questions encourages problem-solving and the use of historical (textual, visual, graphic, material, etc.) sources and maps. The oral questions contain three to six sources and identify three to four processing and interpretation aspects. Moreover, an appropriate interpretation of different types of sources is also expected in the explanation of the question.

The written school-leaving exam tests in history are based on detailed requirements of the central Hungarian school authority, the Office of Education, which is a specialized department of the Ministry of Interior. The school-leaving exam requirements are in line with the NCC and FCs. The central history requirements elaborate on both

the specific content of the test as well as the specific competencies that should be addressed in them.[1]

As to the content requirements, history teaching at the secondary level of education in Hungary is based on a chronological approach, combining Hungarian and European/World history. This means that themes range from ancient Greek and Roman times through medieval times to the most recent history, such as Hungary joining the European Union. In line with this, the school-leaving exam written test in history (at both the intermediate and advanced levels) contains questions and tasks from all these periods of Hungarian and European/world history.

In terms of competencies, the written history exams, in line with NCC and FC guidelines, are highly complex. The general requirements for the school-leaving exams state that one of the primary aims of the history exam is to assess students' ability to examine and analyze historical sources—both primary and secondary—and to envision realistically the lives of people in the past. More specific requirements include the following:

- Acquisition of knowledge and use of sources: this involves recalling knowledge, collecting relevant information from historical sources, formulating conclusions, and interpreting the sources.
- Communication on historical topics and application of professional language: students must demonstrate the ability to express historical ideas clearly and accurately, using appropriate terminology.
- Orientation in space and time: students need to demonstrate an understanding of chronology and geographical context.
- Exploration of factors shaping events and critical, problem-oriented thinking: this includes the ability to interpret differing perspectives on the same events or historical figures, as well as the ability to formulate opinions supported by arguments about controversial events and personalities.

1.4 How are the Exams Scored and Marked?

The Office of Education is responsible for preparing, organizing, and conducting the school leaving exams. The task sets for each subject are prepared by committees of five to eight members. The members of the Subject Committees are mostly practicing secondary school teachers. The chairman's mandate lasts for three years, while the

1 Detailed test requirements regarding "Competencies" are in section A while requirements on the "Content" is in section B. [https://www.oktatas.hu/pub_bin/dload/kozoktatas/ erettsegi/vizsgakovetelmenyek2024/tortenelem_2024_e.pdf]. Accessed 1 June, 2024.

committee members can change annually. The chairman compiles the final task sets on both exam levels from the tasks prepared by the committee members. The task sets are first reviewed by a subject expert and language experts (for all 11 linguistic versions) and then tested by two practicing teachers who are not members of the committee. The reviewed and corrected versions are subsequently sent to the representative of the Office of Education, who can request modifications if necessary. The task sets are finalized based on a joint decision of the committee chairman and the responsible head of the Office of Education.

On the Hungarian written school-leaving tests in history at both exam levels students can achieve a maximum of 100 points: 50% from short-answer questions and 50% from short and long essays. Teachers receive a detailed evaluation guide every year, which includes model answer keys for each short-answer and essay-type questions to ensure consistent scoring and promote fairness and uniformity across assessments.

The first and principal rule for correcting and evaluating short-answer tasks is that correctors strictly adhere to the answers provided in the model answer key. Where the key specifies that an alternate wording of the answer is acceptable, all solutions that convey the same content as the key answer must be accepted. If the key allows for the acceptance of other correct answers, then all historically accurate responses must be acknowledged. A correct answer or an answer component ("item") is generally worth either 0.5 or 1 point, as specified in the model answer key.

A scoring guide for teachers is also prepared for essay assignments. This guide specifies, for each assignment, the requirements that must be met for the answer to receive the maximum score, based on the competencies assessed in the essays. The point values assigned to the competencies vary, as shown in Table 1.

Table 1. Assessment and Scoring of Longer, Essay-Type Questions

Evaluation Criteria	Scoring = points	
	Short	Long
Understanding the Task	0–2	0–2
Location in Space and Time	0–2	0–4
Communication and Use of Special Vocabulary	0–4	0–6
Acquisition of Knowledge and Use of Resources	0–3	0–9
Analysis of Factors Shaping Events, Critical Thinking and Problem-Solving	0–6	0–12
Total (50 points)	17	33

1.5 Contextual Factors

When considering and evaluating the overall impact of the Hungarian written exam system, it is very important to point out that all the task sets as well as the answer keys of

the previous years can be downloaded freely from the website of the Office of Education.[2] It is widely recognized that previous tests are used willingly and frequently by teachers and students alike to prepare for the school-leaving exams. Thus previous sets of exam questions have had a continuing impact on the practice of history teaching in Hungary. Teachers naturally devote more time to developing knowledge and skills that are regularly included in written examination tasks. From this point of view, the formulation of the questions and the types of the tasks over the last 20 years have had a significant impact on Hungarian history teaching (Kojanitz 2023a: 558).

Preparation for the history exam can be considered continuous, as teachers incorporate tasks similar to those on the school-leaving exam when introducing new topics. In the final months leading up to the exam, classes are specifically focused on exam preparation to ensure students' success. Students who choose the school-leaving exam at the advanced level can prepare for it in separate groups in extra history classes during the 11th and 12th grades. State and private book publishers offer special study aids for exam preparation, mainly in the form of sample tasks for school training and individual practice. Many teachers and private businesses offer in-person and online exam training for students in history (and in other subjects too) for a fee. Since history is a compulsory school-leaving subject in Hungary, approximately 70,000 students take the exam each year. This represents nearly 100% of students, excluding only those absent for health reasons.

2. Methodology

2.1 Brief Description of the Analyzed Exam

Our case study analyzes the Hungarian written school-leaving exam test in history from 2023. The written test consists of two parts. The first part contains 12 short-answer tasks comprising a total of 50 subtasks. Most of the tasks are linked to textual and visual sources. Details about this are provided in the detailed analysis. The second part includes essay questions. There are six essay questions altogether in the paper, and students had to choose three: one short task on world history, one long task on Hungarian history, and one complex task.

2 School leaving exam tasks of previous years, plus all solution keys, dating back to 2005, can be accessed at: https://www.oktatas.hu/kozneveles/erettsegi/feladatsorok. Accessed June 1, 2024.

Table 2. The essay questions of the advance-level history exam from 2023

	Historical period	Topic
World history	Up to 1849	**13. The Great Schism (short)** Use the sources and your own knowledge to present the schism between Eastern and Western Christianity. Present the principal structural differences between the churches that evolved as part of the process.
	After 1849	**14. World War II (short)** Use the sources and your own knowledge to present the causes and circumstances of Germany's campaign against the Soviet Union and why it was a turning point in the course of the war.
Hungarian history	Up to 1849	**15. Hungary in the 18th century (long)** Use the sources and your own knowledge to present the demographic and ethnic changes in Hungary in the 18th century. In your answer mention the changes connected to religions in the country.
	After 1849	**16. The crisis of the Kádár period (long)** Use the sources and your own knowledge to analyze the economic processes that led to the crisis of the Kádár period and their social impact.
Complex	–	**17. Medieval royal revenues (covering several periods)** Using the sources and your own knowledge present the changes in royal revenues in Hungary between 1000 and 1490. In your answer mention the following points: • royal revenues in the 11th century, • the changes in royal revenues in the 13th century, • new royal revenues under Charles I, • the changes in royal revenues under Mátyás Hunyadi.
	–	**18. Hungarian state organization in the reform period and the Dual Monarchy (comparative)** Use the sources and your own knowledge to compare state organization and functioning in the reform period and the period of the Dual Monarchy. Do not present a chronology of events. In your answer mention the following points: • the system of government, • the limits of royal power, • governmental responsibility, • government structure, • the form of representation, • the functioning of the counties.

2.2 Research Questions

All NCCs and graduation requirements introduced in Hungary over the past 20 years have aimed to renew the approach and practice of history teaching. The primary focus has been on developing historical thinking, as well as the attitudes and skills necessary for the critical use of sources. The development of these skills will receive attention in

history lessons only if they are essential for the successful completion of the high-stakes school-leaving exam.

To evaluate the efficiency of the exam test in practice, we formulated two research questions:

1. To what extent does the 2023 advanced level school-leaving exam include tasks suitable for assessing source analysis skills?
2. What level of source analysis skills does the school-leaving test require from students?

2.3 Method

In our study, we understand our concepts as follows. By "subtask" we mean every single item that needs an answer (from the student's point of view) and that is marked (from the point of view of the corrector). In the test we analyzed, there are 81 subtasks adding up to a total of 100 points (some subtasks are worth 0.5 points).

The Hungarian school-leaving history exams are rich in sources and resources; almost every written task contains two or three textual or visual sources and resources (Kojanitz 2023a). By "source" we understand primary historical sources (e.g., textual, visual, and statistical ones), including contemporary maps (Herber 2023: 105–112).

By "resource," we mean materials in the tests that are not primary sources but serve as tools from which students can extract information. Resources are sometimes secondary sources (e.g., a historian's account), but more often, they include textual, visual, cartographical, or numerical materials created by textbook editors.

What is common to resources is that they always serve as stimuli for students' thinking about historical events or processes. Good examples of resources are four contour maps included in Part One of the test (Tasks 1, 4, 5, 6). By "infographic," we understand a special type of visual resource that is based on a visual impulse (such as a mind map or a chart) with the purpose of providing visual support for students (visualization; Mitchell 1994; Kjeldsen 2018; Fodor 2019). By "essay," we mean a genre in which students are expected to present a structured piece of written text, where their arguments are based on both historical sources and their own knowledge.

We used the advanced-level school-leaving tasks to analyze both quantitative and qualitative methods: we examined how many sources were associated with the short answer and essay tasks, the proportion of these being primary sources versus resources, and how often both types of materials appeared in the same task. A funda-

mental requirement for assessing source usage is that most of the tasks contain primary sources. We also evaluated the short-answer tasks related to primary sources from the perspective of the level of source analysis required of the students. For this, we used a five-stage analysis grid that was developed by Kojanitz (2023a). It distinguished five levels of tasks based on the type of knowledge and source analysis skills required to solve them—starting from knowledge-testing tasks, progressing through understanding the content of the sources, to tasks requiring the evaluation of source value (Table 3). The sub-tasks are often very different in nature. In many tasks, the same source is associated with a knowledge-testing sub-task, a sub-task requiring text comprehension, and another requiring the application of knowledge. Therefore, we classified the sub-tasks separately. The analysis covered only those sub-tasks that were related to a textual or other primary sources (e.g., pictures, cartoons, photographs, buildings, or objects).

For evaluating essay tasks, we used a method based on Benjamin Bloom's taxonomy (Bloom 1956), also considering its further developed form that has been developed by Viliam Kratochvíl (2019), in order to systematically qualify cognitive levels of written tests. Bloom's taxonomy is a pedagogical theory that evaluates the cognitive complexity of the learning content. His classification is based on the language analysis of specific instructions, such as the teacher's questions or the instructions of the textbook tasks, such as "name," "compare," "find," "distinguish," "summarize," etc. According to Bloom's analysis, these question words ("what…, why…, in what way," etc.) and instructions indicate what specific cognitive actions are expected from the students, and thus they are reliable signs of the cognitive difficulty of the individual tasks (Kratochvíl 2019: 81). We considered Bloom's taxonomy as a proper analytical tool for classifying test tasks and questions, for distinguishing the cognitive demands of the test, and for assessing the broader learning objectives of the tests under our survey.

Table 3. The levels of tasks based on the type of knowledge and source analysis skills required to solve them

	Levels	Examples	Number of occurrences in the 2023 test
Without own conclusion	1. Does not require any source analysis. Purpose: To test the students' subject knowledge stimulated by sources. It asks about dates, places, and names related to the topic of the source.	Who? When? Where?	10
	2. Requires basic reading or observation skills. Purpose: Students must read the source excerpt or observe details of visual and material sources.	Which sources are the following statements true for? Which historical period do the following images make reference to?	10
	3. Requires linking the source to prior knowledge. Purpose: Students must connect the content of the source with their historical knowledge of the topic.	Name the person whom the sources are about! Match each source to the appropriate location in the map!	25
Own conclusion and source criticism	4. Requires independent conclusions. Purpose: Students must draw conclusions based on the source content.	Identify causes and consequences. Analyze the author's purpose, point of view, party affiliation, or views! Assess the author's attitude toward events, people, or opinions in the source! Evaluate the historical context of the source!	5
	5. Requires comparison or evaluation of sources. Purpose: Students must compare sources or assess their relevance, authenticity, and reliability.	Compare the purpose, content, and presentation of sources! Evaluate the relevance, authenticity, or reliability of the sources! Find relevant information in the sources to answer a question! Find evidence to support or refute a claim.	0

3. Analysis of the Advance-level Written Test in History

3.1 Primary Sources and Resources in the Tasks

Our present research confirms the extensive inclusion of sources and resources in the 2023 advanced-level history written test, to the extent that practically every task involves either sources or resources. Our findings regarding sources and resources are summarized in Tables 3 and 4.

Table 4. Categorization and quantity of sources in the 2023 Hungarian school-leaving written test in history at the advanced level

Types of Sources	Number of Sources in Part One (Short Questions)	Number of Sources in Part Two (Essays)	Total
Primary Sources			
- Textual (e.g., Tasks 14, 15, 18)	30	7	37
- Visual, including maps and contemporary paintings (e.g., Tasks 8, 9, 15)	7	0	7
- Statistical (e.g., Tasks 11, 15)	3	1	4
Sources Total			**48**

Table 5. Categorization and quantity of resources in the 2023 Hungarian school–leaving written test in history at the advanced level

Types of Resources	Number of Resources in Part One (Short Questions)	Number of Resources in Part Two (Essays)	Total
Resources			
- Textual (e.g., written statistical analysis in Task 11)	2	0	2
- Visual: Infographics (e.g., Tasks 2, 4, 18)	2	4	6
- Visual: Contour maps (e.g., Tasks 1, 5, 6)	3	0	3
Resources Total			**11**

As shown in Table 2, the 2023 test, which comprises 15 tasks and questions (12 short-answer questions and 3 essays), includes a total of 48 primary sources. This means that, on average, each task contains more than three primary sources, which can be considered a high ratio. In the short question part, the most typical sources are primary textual sources; of the 48 sources, 30 are textual (62.5%). These tasks can be seen as a form of straightforward knowledge testing, focused primarily on gathering information from various types of resources.

The essay part is also based typically on primary textual sources; there are eight primary sources in Part Two, of which seven are textual and one is a statistical chart. As can be seen in Table 2, there are altogether 11 resources included in the 2023 test as different kinds of textual and visual or numeric impulses for students' thinking about historical events or processes, including three contour maps.

Exploring our first research question also made us look at how students were encouraged to combine sources and resources—their corroboration, comparison of two or

more sources, and identification of similarities between them, etc. If we look carefully at the categorization of the combined use of sources and resources in the 2023 school-leaving written test at the advanced level, we find that eight out of 15 test tasks require a combined use of sources and resources. It can be said that both the "simple short-answer tasks" (in Part One) and the "longer essay-type tasks" (in Part Two) require and encourage students to use a combination of a larger quantity of sources and resources: for example the combined use of three textual sources (in Task 7); the combined use of four textual sources plus five visual sources (in Task 9); the combined use of two statistical sources (in Task 11f); and the combined use of two written sources (in Task 14), etc. In sum, in terms of the quantity and variety of primary sources and resources, the school-leaving written tasks at the advanced level create excellent opportunities and conditions for completing tasks that require the use of sources and resources.

3.2 The Levels of the Source Analysis Tasks

Eight of the 12 short-answer tasks include primary sources. These eight tasks comprise a total of 50 subtasks. The vast majority of the items could be categorized as Levels 2 and 3 on a five-level rating scale. These subtasks do not require students to draw independent conclusions (Table 3). Ten subtasks require factual knowledge, while 10 require an understanding of the content within the source. The most common type of task involves making connections between the details in the source and students' prior knowledge, with 25 subtasks falling into this category. Only five subtasks require students to draw their own conclusions or provide explanations based on the source. However, none of the subtasks demand a comparison or evaluation of the sources from any perspective.

The short-answer tasks typically aim at knowledge-testing, text comprehension, the application of content knowledge linked to primary sources, and gathering information from different types of resources. Most questions and tasks show a rather straightforward knowledge-testing, including tasks such as "name the leader," "name the form of government," "name a political objective," "name the event," "name the event/alliance" etc. A smaller set of short-answer questions and tasks requires students to engage in more complex cognitive processes, such as reasoning or matching—connecting and linking historical facts with textual descriptions, maps, or images—or arranging events in chronological order. For example, see the following tasks.

> Task 3. c) Read the following statement: "Both Hungarian kings linked to the sources also bore the title of Czech king, but the right of the ruler in source A) to the Czech throne was less questionable." Then based on the sources, give reasons that support the statement. Give one reason connected to aspect 1 below and one reason connected to aspect 2 below.

> Task 9. f) Match the appropriate images to the sources. Write the numbers of the images in the correct box in the table. Use each image only once and there is one extra image you will not need.

As to the essay questions of the advanced-level history written test, these are designed as cognitively complex tasks requiring in-depth analysis of sources and resources, and they also require a more thorough written explanation of a historical topic.
To check the three essay tasks, we found questions and tasks that require the usage and analysis of provided sources/resources form some selected points of view or in relation to a particular issue.

Task 14 is a "short essay" on the history of World War II: "Use the sources and your knowledge to present the causes and circumstances of Germany's campaign against the Soviet Union and why it was a turning point in the course of the war." There are two primary sources attached to the task: an excerpt from Adolf Hitler's *Mein Kampf* and a written excerpt from Joseph Stalin's radio speech on July 3, 1941 (two weeks after Germany's attack on the Soviet Union). Based on these two written sources, the task asks students why Germany's campaign against the Soviet Union was a turning point in the course of World War II. Here, the cognitive purpose of the task is clear: using two historical sources, which can be judged as relevant and appropriate to analyze, the task aims at surveying the historical significance of a key historical event. While doing this, a short essay in Task 14 requires written reasoning based on the sources and students' previous knowledge. In practical terms, students need to include quotations from the sources and provide some corroboration as well.

Task 15 is a "long essay" on the history of Hungary in the 18th century: "Use the sources and your knowledge to present the demographic and ethnic changes in Hungary in the 18th century. In your answer mention the changes connected to religions in the country." There are four relevant sources included in Task 15: three written sources (from the 17th and 18th centuries) plus one statistical source (a pie chart on "The ethnic composition of Hungary at the end of the 18th century"). The cognitive intention of the task is clear: testing students' knowledge and skill to "present," interpret, and differentiate change and continuity of a fundamental historical phenomenon on a specific example of demographic and ethnic changes in Hungary.

Task 18, in cognitive terms, is the peak of the Hungarian 2023 written school-leaving history exam test at the advanced level. It is a "complex and comparative" test task that challenges student's most complex writing abilities.

> This task is about the history of Hungary in the 19th century. Use the sources and your knowledge to compare state organization and functioning in the reform period and the

> period of the Dual Monarchy. Do not present a chronology of events. In your answer mention the following aspects: the system of government; the limits of royal power; governmental responsibility; government structure; the form of representation; and the functioning of the counties.

At the core of the task is a four-part infographic (a four-section mind map stretching across an entire A4-sized sheet of paper) visualizing four different state and government structures (of the Kingdom of Hungary and the Dual Monarchy in 1848 and 1967); plus there are two written sources attached (a political proposal and an act). The cognitive goal of the task here is to evaluate historical change in a specific example of the Hungarian and Austrian Dual Monarchy. Any comparative analysis of two political entities (state organizations) and their functioning in two different periods (1848 and 1867) is a challenging task in itself. Task 18 is exceptional for two reasons. Firstly, the task description explicitly requires students to make a comparison. Secondly, this is the only task that explicitly states students must address specific aspects of analysis. The task description provides students with six specific aspects to serve as the main points of assessment, such as "the limits of royal power," "the functioning of the counties," etc. These two features make Task 18 different from the other 15 test tasks, and they lift it to the fourth and fifth cognitive levels of Blooms's taxonomy (Bloom, 1956), which are analysis (i.e., breaking down a complete event into parts) and synthesis (i.e., putting parts together to form a new and integrated whole), respectively. This level of complexity puts Task 18 on the highest cognitive level among the tasks found in the 2023 test.

We observe a peculiar duality or contradiction within the essay tasks. On the one hand, we can see that all three essay tasks require students to use a complex combination of sources/resources and their knowledge. This can be judged as an analysis of primary sources and/or resources. In addition to that, a thoughtful and intentional progression can also be observed across the three essay tasks. Tasks 14 and 15 both require students "to present" (i.e., describe, interpret, write about) relevant historical events, whereas Task 14 requires students to present "causes and circumstances" (Task 14) and Task 15 to present "changes." Moreover, Task 18 is a "complex and comparative" task. The published correction key for the school-leaving written exams reveals the main aspects of the marking criteria. The assessments for all three essay questions are based on the following five criteria: (1) "Understanding the task"; (2) "Location: space and time"; (3) "Communication and use of special vocabulary"; (4) "Acquisition of information and use of sources"; and (5) "Describing the reasons behind an event; critical approach and problem-centered approach." Judging essay Tasks 14, 15, and 18 from these aspects, plus considering their content and immanent cognitive levels, we argue that these three essay tasks (one short essay, one long essay, and one complex and comparative essay) can be evaluated as tasks of the highest levels.

Yet, this cognitive quality is relative. Judging by the aspects of the Bloomian taxonomical system, test questions and tasks included in Tasks 14, 15, and 18 do not go beyond knowledge of remembering information (level 1) or the level of explaining the meaning of information (level 2). In our assessment, the most that these types of essay tasks require at certain points is an analysis (i.e., breaking down complex historical events into their parts [Bloom level 4, for instance in Tasks 15 and 18]). Nevertheless, the majority of questions and tasks in the 2023 test do not aim at real synthesis (putting parts together to form a new and integrated whole [level 5]), and they fall short of meeting the requirements for a nuanced and well-supported evaluation (level 6), which would be preferable to simplistic historical opinions.

The essay questions only require the simple reproduction of what students have learned, rather than an analysis or assessment of sources. In most cases, sources serve only as a reminder for usual knowledge-testing questions. For instance, tasks that begin with the word "Present…" (in Hungarian: *Mutassa be*; see Tasks 14 and 15) are typically not intended to cross-examine historical events or their later interpretations. Instead, they are designed to produce a chronological presentation of events, such as Germany's campaign against the Soviet Union (Task 14) or the administrative system of Hungary in the 18th century (Task 18). Since our present analysis regards only one test, we are careful to say that essay tasks under our survey dominantly demand the recall of students' previous factual knowledge.

4. Conclusion and Discussion

Our analysis of the 2023 advanced-level history examination paper highlights a significant gap in tasks designed to assess critical historical thinking, particularly in the area of source criticism. The exam includes no tasks requiring the evaluation of implicit or explicit content, identification of contradictions between sources, or assessment of their relevance and reliability—key elements of historical inquiry. This absence is concerning, given that these competencies are central to the disciplinary practices of history.

The exam structure further reflects this deficiency. None of the 12 "simple short-answer tasks" in Part One or the three "longer essay-type tasks" in Part Two evaluate students' ability to critically engage with sources or apply procedural historical knowledge. While many tasks involve using sources (see Tables 3 and 4), they primarily test factual recall or surface-level comprehension, failing to measure higher-order thinking skills essential for historical analysis. This misalignment between the stated objectives of the school-leaving exam and its actual design raises questions about its effectiveness in fostering critical historical skills. Despite emphasizing source criticism (Wineburg, 2001; Wineburg & Fournier, 1994) as a goal, the test design prioritizes objectivity and standardization over the nuanced assessment of disciplinary competencies.

A key explanation for this gap lies in the normative character of the Hungarian school-leaving written exams. These exams are not only mandatory but also serve as a critical factor in university admissions. The results influence students' academic futures and affect the schools' rankings. Consequently, state authorities aim to "objectify" the tests by favoring indisputable, closed-ended tasks that can be assessed uniformly and transparently. This emphasis on objectivity limits the inclusion of tasks requiring subjective interpretation or individual reflection, as these are challenging to evaluate consistently. For instance, essay tasks that demand subjective analysis are avoided because their assessment could lead to disputes, potentially undermining the test's credibility. The high rate of student appeals in 2023 (1,363 cases out of 7,120 exams, the highest across subjects) underscores the sensitivity of this issue.

Test designers understandably strive to avoid ambiguity and controversy, yet this approach inadvertently excludes tasks that promote critical thinking in the subject of history. While the essay component shows some balance in complexity, it still prioritizes clarity and uniformity over open-ended, interpretative challenges (Kaposi 2023).

To address these shortcomings, both procedural and substantive changes are needed. Procedural reforms should include clear criteria for selecting and training task designers, as well as the systematic monitoring and evaluation of test tasks to ensure alignment with higher-order cognitive objectives (Kojanitz 2023b). Substantive reforms must focus on incorporating tasks requiring higher-order thinking, such as drawing historical analogies, creating models, formulating hypotheses, and distinguishing essential factors from secondary ones. Essay tasks should encourage multi-perspective evaluations of controversial historical events. Balancing these reforms with the test's normative character is undoubtedly challenging. However, international examples and domestic research can inform the development of tasks that are both fair and pedagogically valuable.

The current exam design's limited focus on higher-level historical thinking negatively impacts history teaching, particularly at the advanced level. Redefining the concept of the "essay" to prioritize argumentative, comparative, and justifying texts could enhance students' ability to critically engage with historical events. This would also prepare them for more nuanced public discourse on historical and political issues (Kaposi 2023; Van Nieuwenhuyse 2016). Furthermore, the development of students' writing skills—particularly in crafting analytical and synthetic texts—requires greater emphasis. History education must integrate systematic instruction in text creation and editing, as these skills are rarely practiced consciously in Hungarian schools. Enhancing students' reading and writing abilities calls for an interdisciplinary approach, linking history with language and communication studies (Holdinga, van Drie, Janssen & Rijlaarsdam 2023).

Maintaining the current level of the Hungarian school-leaving written test in history necessitates a dual focus on task design and skill development. By fostering higher-order thinking and communication skills, the exam can better align with its objectives, ensuring that future generations are equipped to engage critically with historical and contemporary issues.

Literature

Bloom, B. et. al. 1956. *Taxonomy of educational objectives: The classification of educational goals*. Vol. Handbook I: Cognitive domain. New York, Longmans, Green and Co.

Dárdai, Ágnes & Kaposi, József 2008. A kezdet vége, avagy a történelemérettségi vizsga fejlesztésének további lépései. [The end of the beginning, or further steps in the development of the history graduation exam.]. In: Bánkuti, Z./Lukács, J. (Eds.): *Tanulmányok az érettségiről. Hatásvizsgálat. Tantárgyi vizsgák értékelése* [Studies on graduation. Impact assessment. Evaluation of subject exams.] Task development. Budapest, Oktatáskutató és Fejlesztő Intézet, 169–186.

Fekete, Áron (szerk.) 2024. *Történelem mint tudomány és mint iskolai tantárgy II*. Komárom, Selye János Egyetem Tanárképző Kar.

Fodor, Richárd 2019. A képes történeti források és a vizuális multiperspektivizmus tankönyvi kapcsolata. [The relationship between pictorial historical sources and visual multiperspectivism in textbooks.] In: Kaposi, J. & Szőke Milinte, E. (Eds.): *Pedagógiai változások – a változás pedagógiája*. Budapest, Pázmány Péter Katolikus Egyetem.

Gautschi, P. & Buff, A. 2023. History education in the brod present. In: Fink, N./ Furrer, M./Gautschi (eds.). *Why History Education?* Frankfurt am Main, Wochenschau Verlag, 23–49.

Gautschi, P. & Steger, J. 2020. Simple examination tasks instead of complicated tests! *Public History Weekly* [online], July 20, 2020. [dx.doi.org/10.1515/phw-2020-16981]

Gyertyánfy, András: A történelmi tudás mérése – szempontok és nehézségek [Measuring historical knowledge – considerations and challenges]. *Történelemtanítás*, (LX.) Új folyam, Vol. XVI., no. 1–2, 2025. DOI: 10.71011/torttan.2025.1-2.05.

Herber, Attila 2023. A képi források elemzésének kérdései a középiskolai történelemtanításban [Issues in the analysis of visual sources in high school history teaching]. In: Kojanitz, L. (ed.)(2023): *Korszerű történelemoktatás – új utak és megoldások*. Szeged, Belvedere Meridionale, 101–138.

Holdinga, L., van Drie, J., Janssen, T., & Rijlaarsdam, G. 2023. Writing to Learn History: An Instructional Design Study. *L1-Educational Studies in Language and Literature*, 23(1), 1–45. (https://doi.org/10.21248/l1esll.2023.23.1.526)

Hopka, Zoltán 2025. II. Lipót öröksége: Belgium gyarmati múltjának tükröződése az ország történelemoktatásában. [King Leopold II's Heritage: Reflection of Belgium's colonial past in the Belgian history teaching]. In. Jeszenszki, Kornélia (ed.): *Történelem mint tudomány és mint iskolai tantárgy III*. Komárno, Selye János Egyetem Tanárképző Kar, 179–194.

Jeszenszki, Kornélia 2025. Célzott szakmai interjúk mint módszertani eljárás a történelemtanítás helyzetének tükrében [Professional interviews with teachers as a research method…]. In: Tóth, Péter – Berzsenyi, Emese – Hegyesi, Dóra (eds.). *II. Imre Sándor Neveléstudományi Konferencia – Oktatás egy változó világban*. Budapesti Műszaki és Gazdaságtudományi Egyetem, Gazdaság- és társadalomtudományi Kar, Műszaki pedagógia Kar, 93–98.

Kaposi, József 2023. Az esszéfeladatok problematikája a történelem érettségi vizsgán. [The problem of essay tasks in the history graduation exam.] *Rendszerváltó Szemle*, Vol. VIII., Autumn 2023, No. 3, 50–57.

Kjeldsen, J.E. 2018. Visual rhetoric argumentation. *Semiotica* (220), 69–94.

Kojanitz, László 2023a. Historical sources in exam tests: An analysis of school leaving exam tasks in terms of the use of primary sources. *Hungarian Educational Research Journal*, Volume 13, Issue 4, 552–566. DOI: 10.1556/063.2023.00167. (https://akjournals.com/view/journals/063/aop/issue.xml)

Kojanitz, László (ed.) 2023b. *Korszerű történelemoktatás – új utak és megoldások* [Modern history education - new ways and solutions]. Szeged, Belvedere Meridionale.

Kratochvíl, Viliam 2019. *Metafora stromu ako model didaktiky dejpisu k predpokladom výučby*. Bratislava, Vydavateľstvo Raabe.

Mitchell, W.J.T. 1994. The pictoral turn. In: Mitchell, W.J.T. *Picture theory. Essays on verbal and visual representation*. University of Chicago Press, Chicago, 11–34.

Tóth, Judit 2024. Examining the cognitive validity of the intermediate school-leaving exam tasks in History with the thinking-aloud method among secondary school students. *Eruditio-Educatio*, 2024/3 (19. vol.), 15-36. (http://e-eruditio.ujs.sk/wp-content/uploads/2024/ 11/ Eru-Edu_2024_3_02_Study_015-036.pdf)

Vajda, Barnabás 2023. Teaching history in Slovakia. In: Fink, N./Furrer, M./Gautschi, P. (Eds.): *Why History Education?* Frankfurt am Main, Wochenschau Verlag, 138–152.

Vajda, Barnabás 2016. On the global–national–regional–local layers of the Slovak secondary school history schoolbooks. *Yearbook of the International Society of History Didactics*. Schwalbach, Wochenschau Verlag, 139–152.

VanSledright, B. 2013. *Assessing historical thinking and understanding innovative designs for new standards*. New York, Routledge.

Wineburg, S./Fournier, J. 1994. Contextualized thinking in history. In: Carretero, M./Voss, J.F. (Eds.): *Cognitive and instructional processes in history and the social sciences*. Mahwah, New Jersey, Lawrence Erlbaum Associates.

Wineburg, S. 1991. Historical problem solving: A study of the cognitive processes used in the evaluation of documentary and pictorial evidence. *Journal of Educational Psychology*, 83(1), 73–87. DOI: 10.1037/0022-0663.83.1.73.

Csilla Fedinec

A Historical and Legislative Enquiry into the Regulation of the Rights of National Minorities and Indigenous Peoples in Ukraine from 1989 to 2024

Abstract: The issue of the state language, minority languages, and minority rights in general is extensively covered in Ukrainian literature. This study summarizes the developments from the passing of the first Ukrainian language law in 1989 to the end of 2024. It provides a detailed overview of how the content of all basic concepts and legislation has evolved, thereby dispelling many misunderstandings and correcting misinterpretations in propaganda. The issues are examined in both the Ukrainian and international contexts, with examples relating to the Hungarian minority.
Keywords: Ukraine; national minorities; indigenous peoples; legislation

* Cs. Fedinec's ORCID: 0000-0002-9156-9002

https://doi.org/10.61795/fssr.v27y2025i5.04

International Overview

Even today, it is difficult to imagine a region of the world without some degree of ethnic, cultural, or religious conflict. The 770 million inhabitants of Europe today represent more than 100 ethnic groups of all sizes in fewer than 50 countries, with one in seven belonging to a minority (Pan–Pfeil–Videsott 2018: 3–4, 8). Even in a democracy, the law of the majority always prevails, and the protection of minorities is not automatically a guaranteed right (Pan–Pfeil–Videsott 2018: 6).

Over the past century or more, neither war nor peace has resolved the question of nationality. The question of minority rights was raised by the Versailles Peace Treaty at the end of the First World War, because the small nation states it created in place of the great empires were not ethnically homogeneous. The nation-states of Central and Eastern Europe were obliged to sign treaties on the protection of minorities, but in practice these were not implemented. Rather, they were seen as interfering in the nation-

states' internal affairs and restricting their sovereignty, and this attitude has in many respects remained unchanged to this day. The League of Nations was set up as an external body, but it functioned as a kind of "complaints bureau" without effective legal protection, and it ceased to exist formally during the Second World War. In 1945, it was replaced by the United Nations (UN) to promote cooperation between its member states. From 1975 it was supported by the Conference on Security and Cooperation in Europe (CSCE), which had mainly an observer status and was institutionalized in 1992 as the Organisation for Security and Cooperation in Europe (OSCE; Szalayné Sándor 2003: 80–81; Eiler 1997: 64–91).

There is still no international legal status for national minorities, no uniform definition of the term "minority," and no specific clarification of minority rights. Instead, at most there are only political guidelines without sanction mechanisms (see, among others, the 1990 OSCE Copenhagen Act, the 1992 UN Declaration on the Rights of Minorities, the 1992 Council of Europe European Charter for Regional or Minority Languages, and the 1995 Framework Convention for the Protection of National Minorities; Vizi 2018: 4). The UN International Covenant on Civil and Political Rights (1966) made the right of self-determination of "peoples" the basis for access to rights, without defining "peoples" (Article 1[1]) and made the free exercise of culture an individually exercisable right for all members of ethnic, religious, and linguistic minorities (Article 27[1]). The Charter of Paris for a New Europe (1990), which is not an international treaty but part of customary law, offered the continent a democratic model based on cooperation and conflict prevention (Majtényi–Vizi 2003: 193).

In the euphoria of the end of the Cold War, Fukuyama argued that humanity had reached the end of history in terms of political systems, especially after the fall of the Soviet Union, and that there was no alternative to modern societies based on liberal democracy and market-driven economic systems (Fukuyama 1992). Huntington, who polemicized with him, stressed the irreconcilable, eternal struggle of civilizations, which inevitably leads to war conflicts time and again, but at the same time he explicitly pointed out that, from a civilizational point of view, the possibility of a Russo-Ukrainian war was minimal (Huntington 1996). These theories did not prove to be a universal approach, just as international instruments could not provide uniform protection.

Nation and Minorities in Ukraine

The relationship between the state and national minorities is asymmetrical, according to the authors of the Handbook of European National Minorities. Examples include the former Yugoslavia, the Caucasus, Chechnya, the Palestinian and Kurdish issues, and Ukraine.

> The problem of the redistribution of power lies at the vertex of the relations between states and national minorities. Because the granting of rights of protection to national minorities means that the states must relinquish certain positions of power, while conversely the minorities gain new positions of power as a result of specific rights of protection. A situation of contrary interests consequently exists between states and minorities because it has to do with positions of power which each of the two parties maintains and which neither of the two parties wants to relinquish. (Pan–Pfeil–Videsott 2018: 7)

At the regional level in Ukraine, the minorities with at least 10% of the population are Russians, Hungarians, Romanians, and Crimean Tatars. All other nationalities are either less visible or a significant proportion of the ethnic group consider their mother tongue to be a language other than their national language. According to the only census to date, in 2001 the combined proportion of Ukrainians and Russians was 95.10%, which constituted 96.42% of the Slavic population. By nationality, 77.8% of the population of Ukraine identified themselves as Ukrainian and 17.3% as Russian. At the same time, 67.5% said that their mother tongue was Ukrainian and 29.6% Russian, with Russian dominating in the public sphere (State Statistics Committee of Ukraine 2001).

The untenability of the stereotypes and myths promoted by Russian policy that Ukraine and Ukrainians are more loyal to the "Russian world" than to Ukraine and Ukrainian patriotism has become clear (Kuzio 2019: 297–309), especially since Russia's full-scale war against Ukraine. Moscow expected the Russian nationality and the Russian-speaking population, regardless of their nationality, to respond positively or at least neutrally to the Russian invasion. This expectation was based on the view, shared by many Western politicians and analysts, that Ukraine was deeply divided, particularly between Ukrainians and Russians, with native Russian speakers of other ethnicities also closer to Russia than native Ukrainians and consequently opposed to the pro-Western and nationalizing policies of the Ukrainian state. However, experience has shown the opposite to be true, especially as the Russian occupation has affected the eastern and southern parts of Ukraine, where Russian speakers predominate. There are increasing signs that Ukrainian identity is no longer a characteristic of a particular ethnic group but is now emerging as a national identity that appears to be society wide (Kulyk 2022b: 299–323).

The First Law on Minorities and the Constitution of Ukraine

The rise of nationalist sentiment in Ukrainian society in the period before the collapse of the Soviet Union declined significantly after independence, mainly because of the economic collapse that followed (Shulman 2003: 217). This was a problem that all the successor states had to face, and the ways in which they dealt with it gave rise to the different state models. In 1991, only Azerbaijan, Georgia, Kyrgyzstan, Tajikistan, and

Uzbekistan were poorer than Ukraine in the region. The economy shrank year after year until the turn of the millennium. Ukraine's main problem was that, alongside a political system based on democratic elections, the post-Soviet nomenclature and new owners had created an oligarchic economic system, which, however, managed to turn the economy around after the millennium and increasingly claimed a place in politics. With the Orange Revolution of 2004 (the first Majdan), and even more so with the Revolution of Dignity of 2013–2014 (the second Majdan), social pressure forced a decisive choice between Russia, which covertly and then increasingly openly challenged the existence of a sovereign, nation-state Ukraine, and Europe, which identified itself with the European Union.

Despite the difficulties, early legislation was based on broad democratic foundations. The Law of Ukraine No. 2494-XII of 1992 on Ethnic Minorities (1992 Law on Ethnic Minorities) introduced the concept of "national minorities" in place of the previous concept of "nationalities," defining them in Article 3 as citizens who are not ethnic Ukrainians but feel a sense of national identification and affinity with each other.

The law, which underwent few changes during its period of application, guaranteed, inter alia, equal political, social, economic, and cultural rights and freedoms for all citizens; promoted the development of national consciousness; protected the sovereignty and territorial integrity of the State, the language, culture, traditions, customs, and religious affiliation of the Ukrainian people and all national minorities; and ensured the right to use names in accordance with national traditions, the prohibition of discrimination on grounds of nationality, and the recognition of the exercise of national rights at both the individual and the collective levels. The legislation considered minority rights as part of fundamental human rights (Article 1) and guaranteed the right of all national minorities to national and cultural autonomy (Article 6). This included the use of the mother tongue and learning in the mother tongue or learning the mother tongue in state educational institutions or through national cultural associations, the development of national cultural traditions, the use of national symbols, the celebration of national holidays, the practice of religion, literature, art, mass media, the establishment of national cultural and educational institutions, and any other activity not contrary to the law in force. The law did not, however, provide for the creation of "national administrative units," the much-vaunted territorial autonomies (Filippini 2022: 113). In accordance with the law, a separate Ministry of Nationalities was established in 1993 to deal with minority affairs, which was reorganized as a state committee in 1996 and placed under a rotating ministry as of 2014 (Csernicskó–Tóth 2021: 14).

The Constitution of Ukraine, adopted in 1996, recognizes three categories of ethnicity, unchanged since then: the Ukrainian nation, indigenous peoples, and national minorities. Article 11 states that "the state shall promote the consolidation and development

of the Ukrainian nation, its historical consciousness, traditions and culture, as well as the development of the ethnic, cultural, linguistic and religious identity of all indigenous peoples and national minorities of Ukraine." The category of "indigenous peoples" had not been included in any other legislation apart from the Constitution until 2014.

Language Laws

States around the world have different ways of regulating language rights. The creation of a separate language law is a feature of Central and Eastern Europe. Examples of such laws exist in Poland, Slovakia, Estonia, Latvia, Lithuania, Belarus, Russia, Moldova and, of course, Ukraine.

The ethnic composition of Ukrainian society can be considered typical of Central and Eastern Europe, where different ethnic groups have intermarried for many centuries and fairly large minority groups have emerged in the new nation-states created after the First World War. In the territory of today's Ukraine, in addition to the clear Ukrainian majority, several minorities have been living in the same area for centuries, more or less concentrated in a defined area, with Moldovans, Bulgarians, Hungarians, and Romanians among the more than 100,000 minorities living in the area bordering their motherland. Two other ethnic groups, Poles and Jews, historically formed much larger communities, but their numbers have declined dramatically over the centuries as a result of deportations, ethnic cleansing, and emigration. At the same time, many ethnic groups in the former Soviet Union, particularly Russians, have increased significantly as a result of migration encouraged by the Soviet regime.

The most serious legacy of the Soviet empire was the large-scale linguistic and cultural Russification of the titular nation in the post-Soviet states, including Ukraine (Kulyk 2002a: 10–11). In this context, ethnopolitics, especially language, has always been a divisive issue in Ukraine, where Ukrainian and Russian have coexisted in a precarious balance. Already in the 1990s, many people saw the choice between Russian and Ukrainian as a symbol of two political and cultural cleavages: belonging to Russia and belonging to Europe and the West. The promotion of the Ukrainian language—no legislation in the country has ever deviated from Ukrainian being the sole state language—was intended to counterbalance its historical subordination to Russian (Bilaniuk–Melnyk 2008: 340–372). Linguistic diversity continued to play a crucial role after the country gained independence in 1991, as the development of the language, its place, and its role in the state was a matter of debate not only for minorities but also for the titular nation (Csernicskó–Fedinec 2016: 560–582).

The Law of the Ukrainian Soviet Socialist Republic No. 8312-XI of 1989 on Languages of the Ukrainian SSR, adopted during the Soviet period, was considered the first lan-

guage law, and while it did not contain a specific list, it protected the languages of "all" national minorities. The law defined Ukrainian as the state language and Russian as the language of inter-ethnic communication. Moreover, it guaranteed the use of the mother tongue and any other language and the freedom to choose the language of education and upbringing. It also allowed the use of the languages of national minorities alongside the state language in regional and local government administration in territorities of administrative units where the representatives of the national minority concerned constitute a majority (subject to a 50% threshold).

The language laws include the ratification of the European Charter for Regional or Minority Languages (conditionally the laws on second and third languages). Parliamentary Assembly Opinion 190 (1995) on the accession of Ukraine to the European Union stipulated, inter alia, the need to ratify the European Charter for Regional or Minority Languages (1992), which was done in 1999 by Law No. 1350-XIV of 1999. However, a group of parliamentarians appealed to the Constitutional Court, which annulled the law for unconstitutionality in its decision No. 9-rp/2000 of July 12, 2000. The charter was ratified again by Law No. 802-IV of 2003 on the Ratification of the European Charter for Regional or Minority Languages but did not enter into force until 2006. In it, Ukraine made fewer commitments than in 1999 but placed the languages of the same 13 national minorities (Jewish, Belarusian, Bulgarian, Gagauz, Greek, Crimean Tatar, Polish, Hungarian, Moldovan, German, Russian, Romanian, and Slovak) under the same protection as in the previous, repealed law (Bowring–Antonovych 2008: 157–182).

The fourth piece of legislation, the Law of Ukraine No. 5029-VI of 2012 on the Principles of the State Language Policy (2012 Law of Language), lists 18 minority languages (Belarusian, Bulgarian, Gypsy, Gagauz, Greek, Yiddish, Karaite, Crimean Tatar, Crimean Tatar, Polish, Hungarian, Moldovan, German, Russian, Armenian, Romanian, Ruthenian, and Slovak). The list also included Ruthenian, although Ruthenians have never been recognized as a separate nationality by Ukraine, and Gypsy, which is not a separate language but a summary category. This is the only legislation that has granted regional rights to minority languages whose speakers exceed 10% of the population in a given region. However, the law has been the subject of much international criticism. Among others, the OSCE High Commissioner on National Minorities has called the law "deeply divisive," because it disproportionately favors Russian while "removing most of the incentives to learn or use Ukrainian" (Human Rights Watch World Report 2013). The Venice Comission Opinion on the Draft Law on Languages in Ukraine (CDL-AD [2011] 008) issued a preliminary opinion on the legislation, essentially stating what the opposition has consistently argued: that the draft is unbalanced because it disproportionately strengthens the position of Russian without supporting Ukrainian as a state language, which is an important means of social integration.

On February 22, 2014, President Viktor Yanukovych fled the country, and the next day the parliament voted to repeal the language law. However, there was also a strong Ukrainian sentiment in society that protested against what they saw as an undemocratic move, and in accordance with the constitution, the acting president, the speaker of the Ukrainian Parliament, Oleksandr Turchynov, did not sign the document and it did not come into force. However, preparations for a new language law have begun, without success (Fedinec–Csernicskó 2020a: 137–142). The legislation (the 2012 Law of Language) was eventually annulled by the Constitutional Court of Ukraine in its decision No. 2-R/2018 of February 28, 2018, on formal grounds related to the circumstances of its adoption. This has created a legal vacuum until the next language law is adopted.

The most recent, the (State) Language Law of 2019, Law of Ukraine No. 2704-VIII of 2019 on Ensuring the Functioning of the Ukrainian Language as the State Language (2019 Law on [State] Language), did not list the languages of indigenous peoples and national minorities but distinguished between them, creating a legal loophole, as previous laws did not define these terms. This law, unlike previous ones, cannot be considered a general language law but rather a law on the protection of the state language, which provides for the exclusive use of the state language in state administration, public life, culture, and sport, with the exception of private conversations and church ceremonies, and restricts the use of minority languages in mass media and education. This gave legal form to an approach to the state language that had previously only been consistent in the practice of the Constitutional Court of Ukraine (Fedinec–Csernicskó 2020b: 85–110). This legislation was subsequently evaluated by the Venice Commission Opinion (CDL-AD [2019] 032), which stated that it fully recognized that the legitimate aim of every state is to strengthen the state language, but that a fair balance must be struck between the preservation and promotion of the state language as a means of social integration on the one hand and the protection of the linguistic rights of persons belonging to national minorities on the other, and that measures must not unduly restrict the linguistic rights of persons belonging to national minorities. However, the commission also pointed out that it takes note of the decision of the Constitutional Court of Ukraine No. 1-r/2021 of July 14, 2021, in which the constitutional court ruled that preferential treatment of languages in favor of languages of national minorities that are also official languages of the European Union does not constitute discrimination contrary to the Ukrainian Constitution.

Laws on Education

On September 5, 2017, a few days after the entry into force of the EU-Ukraine Association Agreement on September 1, the Ukrainian Parliament voted on the Law of Ukraine No. 2145-VIII of 2017 on Education (2017 Law on Education), which was signed by the President of Ukraine later than usual on September 25 and entered into

force on September 27. The framework law provided for a general reform of education, the content of which was barely discussed by experts and the public, with the focus of interest being Article 7, the language article, which was amended just before the final vote so that the deputies themselves could not see it, and which did not correspond to the version of the text that had been agreed with the representatives of the nationalities. The law states that "the language of the educational process in educational institutions shall be the State language" (Article 7[1]). In addition, it establishes four categories of persons concerned: the titular nation, indigenous peoples, national minorities ("which are official languages of the European Union"), and a fourth, unspecified category that the other categories imply is for Russians. The distinction is not only symbolic but also factual, as the law grants different rights to each category (Csernicskó 2021: 137–152).

The Parliamentary Assembly of the Council of Europe, in its urgent resolution 2189 (2017) of October 12, 2017, on the Ukrainian law on education, noted, inter alia, the need to revise the language article of the law to provide for the non-discriminatory treatment of all members of indigenous peoples and national minorities. The resolution states:

> Knowledge of the official language(s) of a State is a factor of social cohesion and integration, and it is legitimate for States to promote the learning of their official language(s) and to require that the State language(s) be the language(s) of education for all. (Point 4)
>
> When States take measures to promote the official language(s), these must go hand in hand with measures to protect and promote the languages of national minorities. If this is not done, the result will be assimilation, not integration. (Point 5)

In addition, it refers to the principle of non-discrimination (Point 6). On this basis, the law "does not appear to strike an appropriate balance between the official language and the languages of national minorities" (Point 7), and the law deprives national minorities of acquired rights in the language of education, which does not favor the concept of "living together" based on the above principles of the Council of Europe's Framework Convention for the Protection of National Minorities.

Similarly, the Venice Commission's Opinion of December 11, 2017, on the law states that the language article of the Education Act (CDL-AD [2017] 030) differs significantly from the draft law agreed with minorities and constitutes a disproportionate interference with the existing rights of persons belonging to minorities. The finding on the indigenous issue is particularly noteworthy for the subject of our analysis:

> the Law distinguishes between 'national minorities' and 'indigenous peoples' of Ukraine [...] During the visit to Kyiv, the Venice Commission delegation was given to understand that "indigenous peoples of Ukraine" are those minorities which do not have a kin-state.

> Specific reference was made to the Crimean Tatar, Karaim and Krimchak minorities, but this category would presumably also include the Gagauz and the Roma minorities.

The 2017 Law on Education is a framework law, the details of which are set out in sectoral laws. Article 5 of Law No. 463-IX of 2020 on Complete General Secondary Education, entitled "Language of Instruction in General Secondary Schools," contains a detailed explanation of Article 7 (Language Article) of the 2017 Education Law. The law distinguishes three models of nationality education. Indigenous peoples have the right to receive all general secondary education in the language of the respective indigenous people (monolingual [mother tongue] education model). National minorities can study in their mother tongue in primary education, but in primary and secondary education (from grade 5) an increasing number of subjects are taught in the official language: 20% in grade 5, 40% in grade 9, and 60% in the upper grades. For "persons belonging to ethnic minorities of Ukraine whose languages are not official languages of the European Union" (i.e., Russians), the rate is 80% (the latter two are the bilingual education model). Exceptions are the private institutions, where the right of free choice of the language of the educational process exists.

According to Article 48 of the Law of Ukraine No. 1556-VII of 2014 About Higher Education, as amended by Law No. 2704-VIII of 2019 (2019 Law on [State] Language) and Law No. 392-IX of 2019 on Amendments to Certain Laws of Ukraine on Improvement of Educational Activities in the Field of Higher Education, the language of higher education is the state language (i.e., Ukrainian), but higher education institutions have the right to decide whether to teach one, several, or all subjects in English. As the Law on Higher Education did not provide for any exceptions for privately run institutions, a special situation arose for the Ferenc Rákóczi II Transcarpathian Hungarian College of Higher Education, which was maintained by a charitable foundation "in support of the Transcarpathian Hungarian College" (in fact the Hungarian kin-state). While the college was an accredited higher education institution in Ukraine, it operated with Hungarian as the language of instruction.

The ethnic categorizations in the 2017 Law on Education and the 2019 Law on (State) Language were in clear contrast to the 1992 Law on Ethnic Minorities, which was replaced by two new laws on indigenous peoples and national minorities (communities).

The Law on Indigenous Peoples

For a long time, only four countries in Europe (Finland, Sweden, Norway, and Russia) were considered indigenous (Kent 2014), and only one country, Ukraine, has a specific law on indigenous peoples. The Crimea enjoyed autonomy within the Russian Federation until the end of the Second World War, when this separate status was abo-

lished after the Crimean Tatars were deported to the Asian territories of the Soviet Union on charges of collaborating with the Germans. The peninsula itself was annexed to the Ukrainian SSR in the February 5, 1954, Decree of the Presidium of the RSFSR Supreme Soviet, "considering the commonality of the economy, the territorial proximity, and the close economic and cultural ties between the Crimean Oblast' and the Ukrainian SSR" (Yumashev et al. 1956: 35).

The return of Crimean Tatars to the peninsula, deported at the end of World War II, began in the late 1980s and dragged on for more than a decade, as they were not granted resettlement benefits and were not subject to any alien registration procedures. On November 12, 1990, the Supreme Council of Crimea passed the declaration on the state and legal status of the peninsula, declaring the right of the Crimean peoples to restore their statehood in the form of an autonomous republic, and a local referendum on this issue was held on January 20, 1991. This was the first referendum in the history of the Soviet Union to date, which resulted in a decision by the Kyiv parliament to restore autonomous status. The separate status of Crimea was incorporated into the Constitution of Ukraine adopted in 1996, which is still in force today, and the Constitution of the Autonomous Republic of Crimea was adopted in 1998. The adoption of the Crimean constitution was hailed by the Ukrainian government and some domestic and foreign observers as a solution to the "Crimean problem" (i.e., to prevent Russian separatist attempts to secede from Crimea, to confirm the peninsula's status as an integral part of Ukraine, and at the same time to grant the region autonomy in a number of areas; Shevel 2001: 109–129).

In addition to the state system, the Crimean Tatars maintained the Qurultay of the Crimean Tatar People, which is a national congress and the supreme representative plenary body of the Crimean Tatar people, and the Mejlis of the Crimean Tatar People, which is the supreme executive representative body of the Crimean Tatars in the period between sessions of the Qurultay, elected by its members, as well as its local organisations. The Mejlis is a representative body that has developed over more than two decades and bears the hallmarks of personal national self-government and national self-determination, based on the principle that Crimean Tatars in Crimea, and in Ukraine in general, are not a national minority but an indigenous people under international law, and as such they are entitled to self-determination in their homeland. Kymlicka also pointed out that the term "indigenous" has been used to refer to peoples such as the Crimean Tatars, Roma, Abkhazians, Chechens, Tibetans, etc. (Kymlicka 2007: 265). Despite considerable efforts by Crimean Tatar elites and their supporters abroad, mainly in Turkey, neither the system of separate representation nor the indigenous status has been recognized on the international stage.

The change was brought about by the events of Euromajdan (Revolution of Dignity) in 2013 and 2014. Crimean Tatars supported the revolution in defence of European values and in protest against the Russian occupation and annexation of the peninsula. The Russian authorities began persecuting Crimean Tatar activists on trumped-up terrorism charges, and in 2016 the Russian Supreme Court branded the Mejlis an extremist organization and officially banned it (Sadovskaya–Pfeilschifter 2020). Morever, in Ukraine, which could no longer exercise jurisdiction over the peninsula, where almost 100% of the approximately 250,000 Crimean Tatars lived, proactive legislation against the Crimean Tatars was initiated.

On March 24, 2014, the Verkhovna Rada, the Parliament of Ukraine, adopted Resolution No. 1140-VII of March 20, 2014, on the Statement of the Verkhovna Rada of Ukraine Regarding the Guarantee of the Rights of the Crimean Tatar People as Part of the Ukrainian State. According to the resolution, Ukraine guarantees the preservation and development of the ethnic, cultural, linguistic, and religious identity of the Crimean Tatar people as an indigenous people and of all national minorities of Ukraine and the protection and realization of the inalienable right of self-determination of the Crimean Tatar people; recognizes the Mejlis and the Qurultay; recognizes the UN Declaration on the Rights of Indigenous Peoples; and calls on the government to immediately submit to parliament a bill defining and confirming the status of the Crimean Tatars as an indigenous people.

The UN General Assembly's 2007 Declaration on the Rights of Indigenous Peoples, which did not include a definition of indigenous peoples, now recognizes indigenous peoples not only as individuals but also as a collective subject. While the second ILO Convention (1989) focused on integration, the UN Declaration emphasized the protection of the specificity of indigenous groups (Körtvélyesi 2009: 10–30). The UN Declaration is part of international soft law (i.e., it is not binding for states unless they incorporate it into their domestic legal systems; Toki 2018: 78–79). The final text of the document was adopted by the UN General Assembly on September 13, 2007, with 143 votes in support, 11 abstentions, and four votes against. The abstention at that time included Ukraine (as well as Azerbaijan, Bangladesh, Bhutan, Burundi, Colombia, Georgia, Kenya, Nigeria, Russia, and Samoa; Toki 2018: 71).

By recognizing the UN Declaration on the Rights of Indigenous Peoples through a parliamentary resolution, Ukraine has made the UN Declaration on the Rights of Indigenous Peoples part of its internal legal order (i.e., binding on itself). Since the declaration interprets the concept of indigenous peoples in accordance with the definition in existing international law, it can be assumed that Ukraine has based its definition of indigenous peoples on the provisions of the ILO Indigenous and Tribal Peoples Convention, 1989 (No. 169). According to Article 1(1), the convention applies to

> (a) tribal peoples in independent countries whose social, cultural and economic conditions distinguish them from other sections of the national community and whose status is determined in whole or in part by their own customs or traditions or by special laws or regulations; (b) peoples in independent countries who are considered to be indigenous by reason of their descent from the populations who inhabited the country, or a geographical region to which the country belongs, at the time of conquest or colonisation or of the establishment of the present State boundaries, and who, irrespective of their legal status, retain some or all of their own social, economic, cultural and political institutions.

However, the parliamentary resolution itself did not define the term "indigenous." The parliamentary resolution is subordinate to the law, and according to the constitution, only the law can provide for the rights of indigenous peoples and national minorities (Article 92 [3]).

Shortly after the above-mentioned parliamentary resolution, on April 17, 2014, the parliament adopted the Law of Ukraine No. 1223-VII of 2014 on the Restoration of the Rights of Persons Deported on National Grounds. The law defines the concept of deportation as the "forcible transfer of peoples, national minorities and persons on the grounds of nationality from their permanent place of residence on the basis of decisions of the state authorities of the former USSR or the federal republics" (Article 1). Persons covered by the law may be "representatives of the Crimean Tatar people [*or*] other nationalities (citizens of the former USSR)" who meet the conditions listed in the law (Article 4).

Although the above-mentioned parliamentary resolution of March 20, 2014, instructed the government to prepare the law on indigenous peoples "without delay," the concept of indigenous peoples has appeared in several pieces of legislation since the relevant parliamentary resolution, on the basis of an unwritten "customary law," as mentioned above, for example in the 2012 law on education.

In the final stage of the relevant legislation, President of Ukraine Volodymyr Zelenskyy submitted the Draft Law No. 1616-IX of 2021 on the Indigenous Peoples of Ukraine as a matter of urgency on May 18, 2021, the day of commemoration for the deportation of the Crimean Tatar people in 1944. The bill was registered in parliament on the same day. The explanatory memorandum to the draft law, signed by Deputy Head of the Presidential Office Oleksii Dniprov, points out that there is no legislation in Ukraine that expands the concept of indigenous peoples and that such legislation is therefore necessary—in accordance with the constitution, a law that includes the rights of indigenous peoples, justified by the desire to domesticate international standards, to guarantee the right of indigenous peoples to self-determination and to give them the opportunity to decide independently on their political status.

The draft was commented on by the Ministry of Finance, the Ministry of Education and Science, the State Commissioner for the Protection of Languages (casually referred to as the "language ombudsman"), the Parliamentary Commissioner for Human Rights, the Central Scientific Expert Office of the Verkhovna Rada of Ukraine, and the Committee of the Verkhovna Rada on Questions of Environmental Policy. The Parliamentary Committee on Human Rights, De-occupation and Reintegration of the Temporarily Occupied Territories of Donetsk, Luhansk and the Autonomous Republic of Crimea, National Minorities and Interethnic Relations, which was responsible for the final expert opinion, in its minutes of June 16, 2021, summarized the positive opinions of the above-mentioned institutions and suggested minor clarifications not affecting the substance and the insertion of Article 7(3) (which was done). The law was adopted by parliament on July 1 and signed by the Speaker of the Verkhovna Rada of Ukraine on July 8 and the President of Ukraine on July 22. Thereafter Law of Ukraine No. 1616-IX of 2021 on Indigenous Peoples of Ukraine came into force. The law contains a definition of indigenous peoples, the most important element of which is that it defines an ethnic minority within the Ukrainian population that possesses a distinctive language and culture, has traditional social, cultural, or representative structures, considers itself native to Ukraine, and does not have its own state entity beyond Ukraine (Article 1 [1]). An innovation in the Ukrainian legal order is that self-determination also provides the right to determine political status and the right to economic autonomy and income generation, in addition to socio-cultural development (Fedinec 2023a: 56).

The law was greeted with outrage from Russia, with President Vladimir Putin describing the introduction of the indigenous category as dividing society into first, second, and so on ranks. On June 8, 2021, the State Duma condemned the adoption of this law as "an insult to historical memory and a blatant provocation aimed at escalating tensions and conflicts in Ukraine and abroad" (Terzyan 2022: 8). Hungary's official criticism was mainly that it limits the scope of indigenous (in the Hungarian interpretation: autochthonous) minorities, does not recognize Hungarians, Romanians, Russians, etc. as indigenous, and tries to circumvent the state's commitment to internationally recognized minority rights instruments by referring to "communities" instead of "minorities" (Terzyan 2022: 8; Hungarian Human Rights Foundation, 2021). However, a blanket recognition as indigenous would not change the scope of access to rights; other laws grant additional rights to the indigenous population and deprive national minorities of (acquired) rights. This in turn undoubtedly raises unanswered questions about the equal treatment and protection of minorities (Terzyan 2022: 8).

The Law on National Minorities (Communities)

Ukrainian President Volodymyr Zelenskyy announced in July 2021 that a new law on minorities would be prepared in parallel with the law on indigenous peoples. The head of state made special reference to the terminology:

> We are actively working on a law on national communities in Ukraine. Not minorities, but communities! Because no nationality in Ukraine should feel like a minority, less important, less protected or less happy. No one can be a minority, because we are all citizens of Ukraine [...]. (Roshchenko 2021)

Ukrainian Verkhovna Rada Commissioner for Human Rights Dmytro Lubinets (Ombudsman since July 1, 2022) made a similar argument.

> They are communities, not minorities. [...] The main idea is that no one should be in a minority living on the territory of Ukraine and having Ukrainian citizenship. We are all equal on our land and in our homeland, Ukraine. Therefore, an important step will be to change the legal concept of national minorities to national communities. (Lubynets 2021)

In August 2022, Volodymyr Kulyk, one of the most respected experts, launched a scathing attack on the draft in the press, for both its conceptual inconsistency and its intangible standards. He described the fuss about minorities or communities as a meaningless juggling of words and complained that the draft had not been sent to the relevant research institutions, including the Institute of Political and Ethnic Studies of the National Academy of Sciences of Ukraine, adding that the representatives of minorities should be told honestly "which of their wishes the state is ready to meet and which are not, instead of creating a false impression of 'good for all'" (Kulyk 2022b).

The Law of Ukraine No. 2827-IX of 2022 on National Minorities (Communities) was submitted to parliament on November 24, 2022, where it was adopted during the first reading on December 1 and the second reading on December 13. The document was signed by the President of Ukraine on December 29 and published in the official gazette on December 31.

The title of the law itself makes it clear that the debate on the concept of "national minority" or "national community" has not been settled; the law applies both in the same sense. As mentioned above, the constitution uses the term "national minority." The 1992 and 2022 minority laws do not differ in substance as regards the definition of the term, although the latter is much broader. The law refers to the Declaration of the Rights of Nationalities of Ukraine No. 1771-XII of 01.11.1991. Specifically, it mentions, among other things, the guarantee of the preservation of the traditional place of resi-

dence and the organization of the administrative unit on a national basis (Article 2) and the use of the national language in compact nationality areas on an equal footing with the state language but omits the concept of cultural autonomy. The novelty of the law compared to the previous one is that it incorporates the relevant provisions of the 2017 Law on Education and the 2019 Law on (State) Language. With regard to the former, it confirms that privately run educational institutions can continue to provide education in minority languages, and with regard to the latter, it makes concessions on publishing (Fedinec 2023b: 10). It is important to note that the 2019 Law on (State) Language has of course led to amendments or new sectoral laws in all the areas concerned, which are not discussed here (e.g., laws about film, press, etc.).

The Venice Commission Venice Opinion (CDL-AD [2023] 021) explicitly emphasized that the key concept of the law is the "integration of society," addressing both majority and minority segments of society in order to achieve integration, while also referring to its opinion on previous laws concerning minorities in Ukraine, which explicitly recommended, inter alia, that education reform be considered in this light. It is noteworthy that the commission referred to its 2020 opinion on the amendments to the Legislation on Education in Minority Languages of Latvia (CDL-AD [2020] 012-e), in which it accepted the differential treatment of EU and non-EU languages. However, a key difference is that the Latvian Constitution does not explicitly provide for the protection of any minority language, whereas the Ukrainian Constitution provides such protection for Russian. The commission believes that in the light of the brutal aggression against Ukraine, it would be legally justifiable for Ukraine to suspend this constitutional provision for a period of time. This is also interesting because the Baltic states, which have been members of the EU and NATO since 2004 and which Ukraine sees as an example, are the least permissive in the post-Soviet space on the issue of the Russian minority. The manifestations of the Kremlin's revisionist policy prove that all the instruments of the political strategy chosen by the Baltic states in 1991 are correct and effective (Jundo-Kaliszewska–Włodarska-Frykowska 2021: 179).

Minority Rights and Ukraine's Road to EU Accession Talks

Taking all this into account, it is undeniable that, as of the 2017 Education Act, minority rights have been curtailed. The above legislative process, especially bilingual education, has been continuously criticized by the Hungarian government, the most effective tool of which seems to have been the blocking of the NATO-Ukraine Commission, which continued even after the Russian invasion started in early 2022, until the NATO-Ukraine Council was established at the 2023 Vilnius NATO summit to replace the commission. Hungary has continued to stress, primarily through Minister of Foreign Affairs and Foreign Trade Péter Szijjártó, that it will not support any integration efforts by Ukraine until the Hungarians in Transcarpathia have their rights restored. The Hungarian politi-

cians in Transcarpathia stressed, first and foremost, that the Hungarians in Transcarpathia should also be granted the status of autochthonous peoples, and that this would solve the problems (since they are not covered by bilingual education). However, there was a conceptual problem, which confused public opinion in Hungary, in that it was the indigenous peoples who had this right.

On June 23, 2022, the European Council granted Ukraine candidate status and invited the European Commission to monitor the implementation of the reforms necessary for Ukraine to meet the conditions for applying for membership. The seven criteria included a review of legislation on national minorities. On September 15, 2023, Levente Magyar, Parliamentary State Secretary of the Ministry of Foreign Affairs and Trade, told MTI at the meeting of the Joint Committee on Education that "Ukraine's accession to the EU and NATO and its rapprochement with the EU" can be supported if Ukraine does not restrict the right of the Transcarpathian Hungarians to learn in their native language (Government of Hungary 2023). In an interview published in La Point on December 8, following his meeting with French President Emmanuel Macron on Ukraine, the prime minister also said that the rights of minorities in Ukraine should not be negotiated, as this is not a precondition for accession. "Ukrainians should respect them. Not because they want to join the European Union, but because they need to, if only to maintain their relationship with Europe" (Berretta–Sapin 2023).

On December 8, the Ukrainian Parliament voted Law No. 3504-IX on Amendments to Certain Legislative Acts of Ukraine in the light of the expert opinion issued by the Council of Europe and its bodies on the rights of national minorities (communities) in certain areas, which amends the laws on local self-government, higher education, education, the state language, comprehensive general secondary education, national minorities (communities), and the media. These amendments, among others based on the above-mentioned of the Venice Commission Opinion (CDL-AD [2023] 021), extended the wide range of minority rights to minorities whose language is an official language of the EU. It also settled the situation of the Ferenc Rákóczi II Transcarpathian Hungarian College of Higher Education by extending the right of free choice of language to private educational institutions, such as the college, in the Law on Higher Education. The language article of the 2017 education law never came into force, as its introduction in national schools was postponed twice and then adapted to the Venice Commission's proposals with the 2023 amendments to the law.

As a result, the EU summit on December 14–15, 2023, decided whether Ukraine (and Moldova) can start accession negotiations with the EU. Hungary did not vote on the latter but allowed it to happen in a historic and colorful way: German Chancellor Olaf Scholz took Viktor Orbán out for a "coffee break" (Bettiza 2023). Commenting on the decision, the Hungarian prime minister said that it was a completely pointless, irra-

tional, and wrong decision to open accession negotiations with Ukraine, in which Hungary does not wish to participate, but if 26 other member states insisted on it, then "let them go their own way." In early 2024, Hungary presented Ukraine with an additional "11-point list" of demands concerning minority rights. Although this list was not made public, it was informally released to the press. This was followed by a long and opaque series of negotiations to turn the demands into reality, from which the public was excluded. By the time I concluded this study in early 2025, no agreement had been reached. Hungary had rejected all constructive proposals from Ukraine, making it clear that the "11 points" were in fact a trap designed to hinder Ukraine's EU ambitions (Fedinec 2024a; Fedinec 2024b).

Conclusions

In Ukraine after 2014, we have witnessed that minority rights and national security considerations have often come into conflict with each other as Russia's hybrid warfare has become a systemic problem for Ukraine in particular but also for the whole region (Fiala-Butora 2020: 257; Dumitru 2021: 95–106). Russia has always seen Ukraine (and Belarus) as part of itself, as a guarantee of its integrity. Historically, one of Russia's most important defence strategies has been "depth" (Bērziņš 2014: 1). It is a fact that Belarus is now overwhelmingly Russian speaking and only formally independent of Russia, while Ukraine has constantly struggled to avoid becoming a Russian province, both politically and linguistically. Russia's invasion of Ukraine may now make the securitization of the minority issue part of the international law.

At the same time, it should be seen that the rhetorical and political escalation between Ukraine and Russia is only at first glance a conflict between a post-colonial nationalizing state, an ethnic minority, and the external homeland. The military escalation between the two post-Soviet countries predates Ukraine's post-2014 nationalist laws and policies and is therefore a reaction to, not a cause of, Russian armed intervention (Fedorenko–Umland 2021: 53–82). Ukraine's commitment to and its policy towards the EU remained unchanged. This was also true throughout the period of full-scale war.

Literature

Berretta, Emmanuel – Sapin, Charles 2023. EXCLUSIF. Viktor Orban: «L'Ukraine est l'un des pays les plus corrompus du monde». *Le Point,* <https://www.lepoint.fr/monde/exclusif-viktor-orban-si-vous-laissez-entrer-l-ukraine-dans-notre-systeme-agricole-europeen-elle-le-detruira-08-12-2023-2546242_24.php#11> [last accessed 18.01.2025.]

Bērziņš, Jānis 2014. Russia's New Generation Warfare in Ukraine: Implications for Latvian Defense Policy. *National Defence Academy of Latvia: Policy Paper,* Vol, 2, Iss. 4, 4–7.

Bettiza, Sofia 2023. Hungary's Viktor Orban: Is one man blackmailing the EU? *BBC,* <https://www.bbc.com/news/world-europe-67735680> [last accessed 18.01.2025.]

Bilaniuk, Laada – Melnyk, Svitlana 2008. A Tense and Shifting Balance: Bilingualism and Education in Ukraine. *International Journal of Bilingual Education and Bilingualism,* Vol. 11, Iss. 3-4, 340–372.

Bowring, Bill – Antonovych, Miroslava 2008. Ukraine's long and winding road to the European Charter for Regional and Minority Languages. In: *The European Charter for Regional and Minority Languages: Legal Challenges and Opportunities*. Strasbourg, Council of Europe Publishing, 157–182.

Csernicskó István – Tóth Mihály 2021. *A kárpátaljai magyar közösség nemzetiségi és nyelvi jogai. Kárpát-medencei magyar kisebbségjogi kalauz.* Budapest, Nemzetpolitikai Kutatóintézet.

Csernicskó, István – Fedinec, Csilla 2016. Four Language Laws of Ukraine. *International Journal on Minority and Group Rights,* Vol. 23, Iss. 4, 560–582.

Csernicskó, István 2021. Languages in Conflict Situations in the Context of the Law of Ukraine „On Education" (2017). In: Wingender, Monika – Müller, Daniel (eds.): *Language Politics, Language Situations and Conflicts in Multilingual Societies. Case Studies from Contemporary Russia, Ukraine and Belarus.* Wiesbaden, Harrassowitz Verlag, 137–152.

Dumitru, Ilie-Răsvan 2021. Ukraine between Peace and War with Russia. *Bulletin of "Carol I" National Defence University,* Vol. 10, Iss. 2, 95–106.

Eiler, Ferenc 1997. A két világháború közötti nemzetközi kisebbségvédelem rendszere. *Pro Minoritate,* Iss. 3–4, 64–91.

Fedinec, Csilla 2024a = Фединець, Чілла. Реалізовані та втрачені можливості в угорсько-українських відносинах у питанні національних меншин: історичний огляд. In: Рафальський, Олег – Котигоренко, Віктор (ред.): *Україна – Угорщина: сучасний стан та перспективи міждержавних відносин.* Київ–Ніжин, Інститут політичних і етнонаціональних досліджень ім. І. Ф. Кураса НАН України – Лисенко М. М., 20–29.

Fedinec, Csilla 2024b = Фединець, Чілла: Короткий огляд українського законодавства про національні меншини з особливим акцентом на українсько-угорські дипломатичні відносини. In: Остапець, Юрій – Зан, Михайло – Гіря, Володимир (ред.): *Україна і Центральна Європа: історія, політика, культура.* Ужгород, Ужгородскій Національний Університет – ТОВ „РІК-У", 207–212.

Fedinec, Csilla – Csernicskó, István 2020a. *Nyelvi kirakós Kárpátaljáról. Történeti és politikai dimenziók (1867–2019).* Budapest, Társadalomtudományi Kutatóközpont – Gondolat Kiadó.

Fedinec, Csilla – Csernicskó, István 2020b. A nyelvkérdés Ukrajnában a parlament és az Alkotmánybíróság döntéshozatalában, 1997–2019. *Parlamenti Szemle,* Iss. 2, 85–110.

Fedinec, Csilla 2023a. Az őslakosokról szóló ukrajnai törvény. *Pro Minoritate,* Iss. 1, 45–64.

Fedinec, Csilla 2023b. A nemzeti kisebbségekről (közösségekről) szóló ukrajnai törvény: tartalmi elemzés. *Fórum Társadalomtudományi Szemle,* Vol. 25, Iss. 2, 3–26.

Fedorenko, Kostiantyn – Umland, Andreas 2021. A Triadic Nexus Conflict? Ukraine's Nationalizing Policies, Russia's Homeland Nationalism, and the Dynamics of Escalation in 2014–2019. In: Aasland, Aadne – Kropp, Sabine (eds.): *The Accommodation of Regional and Ethno-cultural Diversity in Ukraine.* Cham, Palgrave Macmillan, 53–82.

Fiala-Butora, János 2020. The Controversy Over Ukraine's New Law on Education: Conflict Prevention and Minority Rights Protection as Divergent Objectives? *European Yearbook of Minority Issues,* Vol. 17, Iss. 1, 233–261.

Filippini, Caterina 2022. The Legal Protection of National Minorities in Ukraine from a Comparative Perspective. In: Bocale, Paola – Brigadoi Cologna, Daniele – Panzeri, Lino (eds.): *Minorities in the Post-Soviet Space Thirty Years After the Dissolution of the USSR.* Milano, Ledizioni Publishing,

Fukuyama, Francis 1992. *End of History and the Last Man*. Free Pres.

Humnan Rights Watch: World Report 2013: Ukraine. Events of 2012. <https://www.hrw.org/world-report/2013/country-chapters/ukraine#> [last accessed 18.01.2025.]

Hungarian Human Rights Foundation: Ukraine's Minorities: an Appeal to Presidents Biden & Zelensky, 2021. <https://hhrf.org/2021/09/01/ukraines-minorities-an-appeal-to-presidents-biden-zelensky/> [last accessed 18.01.2025.]

Huntington, Samuel P. 1996. *The Clash of Civilizations and the Remaking of World Order.* New York, Simon & Schuster.

Jundo-Kaliszewska, Barbara – Włodarska-Frykowska, Agata 2021. National and ethnic minorities and the image of the state in international public relations: a comparative study of Lithuania and Estonia. *Rocznik Instytutu Europy Środkowo-Wschodniej,* Vol. 19, Iss. 3, 177–203.

Kent, Neil 2014. *The Sámi Peoples of the North: A Social and Cultural History.* Hurst Publishers.

Körtvélyesi, Zsolt 2009. Az őslakos népek jogai. *Pro Minoritate,* Issue 3, 10–30.

Kulyk, Volodymyr 2002. *Revisiting a Success Story: Implementation of the Recommendations of the OSCE High Commissioner on National Minorities to Ukraine, 1994-2001.* (CORE Working Paper, 6.) Hamburg, Centre for OSCE Research.

Kulyk, Volodymyr 2022a. Is Ukraine a Multiethnic Country? *Slavic Review,* Vol. 8, Iss. 2, 299–323.

Kulyk 2022b = Кулик, Володимир. Законопроєкт про „національні спільноти": неякісний товар у гарному пакуванні. *Українська правда,* <https://www.pravda.com.ua/columns/2022/08/9/7362359/> [last accessed 18.01.2025.]

Kuzio, Taras 2019. Russian stereotypes and myths of Ukraine and Ukrainians and why Novorossiya failed. *Communist and Post-Communist Studies,* Vol. 52, Iss. 4, 297–309.

Kymlicka, Will 2007. *Multicultural Odysseys: Navigating the New International Politics of Diversity.* Oxford University Press.

Lubynets, Dmitro 2021 = Лубінець, Дмитро. Нацменшини чи національні спільноти? Що змінює новий законопроект? *LB.ua,* <https://rus.lb.ua/blog/dmytro_lubinets/495155_natsmenshini_chi_natsionalni.html> [last accessed 18.01.2025.]

Majtényi, Balázs – Vizi, Balázs (eds.) 2003. *A kisebbségi jogok nemzetközi okmányai*. Budapest, Gondolat Kiadó.

Pan, Christoph – Pfeil, Beate Sibylle – Videsott, Paul 2018. *National Minorities in Europe.* (European National Minorities, 1.) Wien, Verlag Österreich.

Roshchenko, Olena 2021 = Рощенко, Олена. Не нацменшини, а спільноти: Заленський анонсував новий закон. *Українська правда,* <https://www.pravda.com.ua/news/2021/07/ 13/7300375/> Letöltés ideje: 2022. 12. 30.).

Sadovskaya, Polina – Pfeilschifter, Veronika 2020. *From Stalin to Putin: The Crimean Tatars face a new era of Kremlin persecution.* Atlantic Council.

Shevel, Oxana 2001. Crimean Tatars and the Ukrainian state: the challenge of politics, the use of law, and the meaning of rhetoric. *Krymski Studii,* Vol. 1, Iss. 7, 109–129.

Shulman, Stephen 2003. The Role of Economic Performance in Ukrainian Nationalism. *Europe-Asia Studies,* Vol. 55, Iss. 2, 217–239.

State Statistics Committee of Ukraine. Census 2001. <https://2001.ukrcensus.gov.ua/eng/> [last accessed 18.01.2025.]

Szalayné Sándor, Erzsébet 2003. *A kisebbségvédelem nemzetközi jogi intézményrendszere a 20. században.* Budapest, MTA Kisebbségkutató Intézet – Gondolat Kiadó.

Terzyan, Aram 2022. Minority Rights in Ukraine After the Maidan Revolution: Change or Continuity? *Open Political Sciences,* Vol. 5, Iss. 1, 1–12.

Toki, Valmaine 2018. Az őslakos népek jogainak kibontása. *Pro Minoritate,* Iss. 3, 71–85.

Vizi, Balázs 2018. A kisebbségi jogok védelmének európai színtere napjainkban: normatív rezsim és politikai diskurzus. *Pro Minoritate,* Iss. 1, 3–14.

Yumashev et al. 1956 = Юмашев, М. И. [и др.]. *Сборник законов СССР и указов Президиума Верховного Совета СССР. 1938 г. – июль 1956 г.* Москва, Государственное издательство юридической литературы.

ZSUZSANNA LAMPL

The Circumstances of the Foundation of Hungarian Political Parties in Slovakia

Abstract: The Hungarian community in Slovakia lives mostly in the southern regions along the Slovak–Hungarian border. After the First World War (1914–1918), the Austro-Hungarian Monarchy collapsed, and the Hungarians, who had previously lived there, became residents of one of the newly created successor states, Czechoslovakia, as a result of the Treaty of Trianon. In 1919, 689,565 people declared themselves to be of Hungarian nationality. They constituted 23.59% of the population. The Slovak Republic was established on January 1, 1993; at that time, there were 567,296 Hungarians living in Slovakia, making up 10.8% of the population. According to the 2021 Population and Housing Census data, 422,065 citizens of Slovakia claim Hungarian nationality as a matter of priority, which constitutes 7.75% of the Slovak population (in addition, another 34,089 claim Hungarian as their second nationality). Hungarians in Slovakia are the largest national minority. They consider themselves to be people of Hungarian nationality. It is a public declaration of belonging to the Hungarian nation, not in the sense of a political nation, but in the sense of cultural and linguistic belonging. In the sense of a political nation, Hungarians in Slovakia primarily identify themselves as citizens of the Slovak Republic. Without them, there would not be Hungarian parties in Slovakia.

Keywords: Hungarian community in Slovakia; national minority; identity; citizens of the Slovak Republic; Hungarian parties in Slovakia

https://doi.org/10.61795/fssr.v27y2025i5.05

*The present study is an abridged and edited excerpt from the authors' publication titled "Hungarian parties and voters, The stormy beginnings of Hungarian politics in Slovakia following the regime change in 1989."

**The author gratefully acknowledges the contribution of the Scientific and Educational Grant Agency under the project VEGA-2/0068/23 Forms and Mechanism of Differentiation and Reconfiguration of Public and Political life. Collective Actions and Political Attitudes.

The creation of parties after November 1989

The first representative of the Hungarian political elite in Slovakia—and at the same time the first political movement for a change in the political system in Czechoslovakia—was

the Független Magyar Kezdeményezés (FMK[1]) which was founded on November 18, 1989. It was thus the first systemic political movement, as the Czech Civic Forum (Czech: Občanské forum; OF) and the Slovak Public Against Violence (Slovak: Verejnosť proti násiliu; VPN) were established a day later, on November 19, 1989.

The circumstances of the foundation of the FMK were interesting. Lajos Tóth, a well-known Hungarian teacher working in Šala, and the founder of the Vörösmarty Klub educational association, celebrated his 50th birthday on November 18, 1989, and on this occasion he organized a scientific conference entitled The Existential Status of Hungarian Intelligence in Czechoslovakia as a friendly meeting for 130 invited guests. After the conference, a smaller group gathered in the apartment of Károly Tóth and Eleonóra Sándor, who were also present at the conference, and together they founded the FMK.

The founding members of the FMK came from the Committee for the Protection of the Rights of the Hungarian Minority in Czechoslovakia, the Rescue Group of Hungarian Schools, Iródia, Erté Studio, and the Hungarian Pen Club in Czechoslovakia, and the members also included leading figures from student movements of the 1960s.[2] As for the name of the movement, the term "independent" did not refer to nationality and did not mean distancing oneself from Czechoslovakia or the Slovaks, but it expressed the independence of the movement from the state authorities and state structures.[3] In its statutes that were established on February 24, 1990, the FMK declared that "It wishes to be a continuation of all the political, social, and individual efforts that have represented independent, autonomous thinking and attitudes toward the arbitrariness of power in recent decades."[4]

On February 19, 1990, the FMK was registered by the Slovak Ministry of Interior and Environment as a political movement under the Political Parties Act adopted on January

1 Független Magyar Kezdeményezés in Hungarian; Maďarská nezávislá iniciatíva in Slovak; Independent Hungarian Initiative in English.

2 Ezt tettük – ezt akartuk (We did this – we wanted this) Source: [https://leveltar.adatbank.sk/?p=101191] "Iródia" was a creative workshop for young writers established in 1983 in Nové Zámky. "Erté Studio" was founded in 1987 as an experimental art association, also in Nové Zámky.

3 Ildikó Haraszti: Mi nem autonómiára törekszünk! (We strive not for autonomy!), *Új Szó*, December 2, 1989, p. 4; A Független Magyar Kezdeményezés sajtóértekezlete: Alapelvek és célok (Independent Hungarian Initiative Press Conference: Basic Principles and Objectives) (ČSTK), *Új Szó*, December 6, 1989, pp. 1–2.

4 A Független Magyar Kezdeményezés Alapszabályzata (Statutes of Independent Hungarian Initiative) Source: [https://leveltar.adatbank.sk/gyujtemeny/a-fuggetlen-magyar-kezdemenyezes-alapszabalyzat/]

23, 1990 (Popély – Simon 2009: 434). The second entity in the row of the emerging system of Hungarian parties was the Magyar Kereszténydemokrata Mozgalom (MKDM[5]). According to the registration application that it submitted to the Ministry of the Interior,[6] MKDM was founded on January 18, 1990, and the Slovak Ministry of Interior and Environment registered it as a political movement on March 19, 1990 (K. Cséfalvay 1995: 32–33).

The third Hungarian political entity was the political movement Coexistence (Együttélés-Spolužitie-Wspólnota-Soužití), which was officially registered by the Ministry of the Interior of the Czech Republic on February 27, 1990, and the Ministry of the Interior of the Slovak Republic on March 1, 1990. However, the unofficial origin of the movement seems to be of an earlier date, as the program statement of the preparatory committee of the political movement Coexistence was published in the daily *Új Szó*[7] as early as February 7, 1990. The name Coexistence was to emphasize the coexistence of different nationalities, based on "patience, forgiveness, mutual respect, mutual knowledge of culture and language. Without equality, parity and law, normal coexistence is not conceivable. Let political and social norms of coexistence be created on the basis of com-

5 Magyar Kereszténydemokrata Mozgalom in Hungarian; Maďarské kresťanskodemokratické hnutie in Slovak; Hungarian Christian Democratic Movement in English.

6 Various events (or at least different names) are associated with this date. On November 2, an appeal titled "On the Organization of Hungarian Christian Democratic Clubs," signed by Rudolf Hamerlík and László Rajczy, was published in the daily *Nap* (which was published by the FMK), stating that an organizing committee of the Hungarian Christian Democratic Clubs had been set up in Bratislava that day. However, according to one of the founders of the MKDM, Gábor Agárdy (see Agárdy in K. Cséfalvay 1995: 35, and *Új Szó*, April 20 1990), the Temporary Regional Organising Committee of Hungarian Christian Democratic Movement was established on that day. However, neither Hamerlík and Rajczy nor Agárdy mention the establishment of the MKDM. At the same point, Agárdy writes a few lines below that "on January 18, we set out to wake up the Hungarian Christian people from their deep sleep..."; however, it cannot be inferred that this means not only the creation of a temporary committee but also the establishment of the MKDM. When at a meeting in Bratislava, the first chairman of the MKDM, Kálmán Janics, also mentioned January 18 and that "the goal [was] to establish Hungarian Christian Democratic Clubs," but he had already emphasized the need to establish an independent Hungarian Christian Democratic Movement. "At the time, I still had the impression that the majority (...) only supported the idea of clubs. However, the situation changed, the supporters of an independent Hungarian organisation founded Hungarian Christian Democratic Movement with the support of a large majority" (K. Janics in K. Cséfalvay 1995: 11). Although he does not state whether it happened on the same day (i.e., January 18), depending on the context, this can be understood and it also follows from the application for registration submitted to the Ministry of the Interior.

7 *Új Szó* is the only existing daily printed in Hungarian in the Slovak Republic and has been published since December 1948.

mon interests linked to common residence. Let the basis of coexistence be general autonomy."[8]

In late autumn 1989, two more Hungarian groups were created. On November 22, the Hungarian Students Union (HSU; Hungarian: Magyar Diákszövetség [MDSZ]), and on November 24, the Forum of Hungarians in Czechoslovakia (FHCZ[9]); yet, these did not become political parties.

Fault lines: differences in political identities

With the establishment of Coexistence and the MKDM alongside the FMK, the first Hungarian party system in post-regime change Slovakia came into being. Namely, this was the development that the FMK had desired from the beginning, though it was not exactly as they had envisioned. Subsequently, earlier disagreements took on new dimensions. What until then had essentially been an intellectual debate (since only the FMK was a major political player in the true sense of the term, unlike Csemadok and the FHCZ), and which all parties had unanimously declared as a positive aspect of democracy, now started to exhibit increasingly sharp fault lines and become a tool of political competition. Lajos Grendel and László Dobos both emphasized that disagreements were not problematic unless they led to "some sort of foolish rivalry"; thus it is evident that political rivalry began in the early spring of 1990, just a few months before the first free parliamentary elections. Not only did the existing nascent fault lines sharpen, but new ones also emerged.

These fault lines—fundamental principles to which the parties had different approaches, leading to different political practices—primarily developed between the FMK and Coexistence but also to some extent between the FMK and MKDM, as the latter was ideologically closer to Coexistence. The contradictions in the principles of political activity, evident from the outset, are difficult to disentangle, because they were closely interconnected and one stemmed from the other. However, it is both worthwhile and necessary to untangle these issues for analysis, as they highlight key differences in perspectives that continue to shape Hungarian politics and public life in Slovakia today. These differences still affect the political identity of Slovakia's political elite and the Hungarian population. The following is a list of these fault lines, though their order is arbitrary; in reality, each

8 Együttélés Politikai Mozgalom a Demokráciáért és a Nemzeti Kisebbségek Jogaiért, 8. pont (Political Movement Coexistence for Democracy and the Rights of National Minorities, point 8), *Új Szó*, 7 February 1990, p. 4.

9 Csehszlovákiai Magyarok Fóruma in Hungarian; Forum of Hungarians in Czechoslovakia (FHCZ) in English.

principle was simultaneously at play and influential. Another question is how much these differing approaches, which led to divergent political decisions, were driven by pragmatic political calculations aimed at advancing the interests of each party.

More ideological fault lines?

The first fault lines were along the "communists versus regime-changing democrats" issue. The FMK openly distanced itself from the communists representing the totalitarian system, in contrast to what the FMK and partly MKDM defined as Coexistence's less decisive position. The first major divide was between the communists and the regime-changing democrats. The key question was whether reforming the socialist system was sufficient, or whether a radical regime change—involving a complete rejection of socialism and return to capitalism—was needed. Representatives of the FMK firmly supported the latter, which they defined as true democracy, believing that essential prerequisites for democracy were dismantling the communist party's monopoly and holding free elections.

As a result, the FMK considered a clear and explicit break from the communist party and the socialist system to be crucial. They were so confident in the radical nature of the regime change that they "believed the communist party would disappear" (László Öllös in Popély – Simon 2009: 514). In the FMK's statement of principles dated November 24, 1989, the first point asserted that it "rejects all totalitarian ideologies."[10] However, it is important to note that the Slovak opposition, and later the regime-changing movement VPN–FMK, was the VPN's partner movement (in the beginning even its think tank,[11] according to the recollections of FMK's founders) and was not initially as firm or clear in its stance on a complete break from the socialist system and radical regime change.

10 The Statement of Principles of the Független Magyar Kezdeményezés. Source: [https://leveltar.adatbank.sk/gyujtemeny/a-fuggetlen-magyar-kezdemenyezes-elvi-nyilatkozata-2/]

11 "The prominent role of FMK members during the early weeks and months can be attributed to the fact that we had a clear vision of how to carry out a revolution, implement change, identify key tasks, and dismantle a social system. Many of us were well versed in critical social theory, and it is important to note that we had strong connections with opposition figures in the Czech Republic, Slovakia, and Hungary. Our greatest advantage, which the Independent Hungarian Initiative effectively leveraged, was the firsthand experience with the Hungarian regime change – every detail of it" (László A. Nagy in Popély – Simon 2009: 425). Károly Tóth echoed this sentiment: "Our political influence far exceeded what we could have achieved as a minority organization" (Károly Tóth in Popély – Simon 2009: 739). See also the excerpt from the FMK spokesperson's statement: the FMK "played a crucial role in establishing the NyEE executive committee and shaping its work." Már a választások jegyében. Megtartotta első országos közgyűlését a Független Magyar Kezdeményezés (Already in the spirit of elections. The Independent Hungarian Initiative held its first national assembly). *Új Szó*, February 26, 1990, pp. 1–2.

Károly Tóth mentioned a meeting with Slovak opposition members held in October 1989, only one month before the revolutionary events. At the meeting, "all the key figures of the later political leadership were present," and political issues arose. The conversation revolved around "how [they] envisioned the democratization process in Slovakia. At that time, Miroslav Kusý and his group unquestionably favored Alexander Dubček and a vision of democratic socialism. The figure of Dubček was mentioned in this discussion as a potential solution, as a way to rehabilitate the 'socialism with a human face' of 1968" (Károly Tóth in Popély – Simon 2009: 725). This idea persisted even during the November events: "The key question was whether there would be a genuine regime change or just some cosmetic adjustments to the system. That was decided in the early days. Most Slovak reformers believed it was only about system tweaks. That is why they were often taken aback when we insisted that constitutional changes were necessary" (A. Nagy László in Popély – Simon 2009: 425).

László Gyurovszky had a similar experience at the opposition meeting held at Galéria Umelka in Bratislava the day after the events in Prague: "It was a powerful moment for everyone experiencing that open criticism of the system was finally beginning. But for us Hungarians, it was also clear that this was not enough. These people, 99.99% of them, had no experience in opposition politics; they did not understand what was happening in the Czech Republic or Hungary and had no idea what needed to be done. They held unrealistic expectations, which later became apparent" (László Gyurovszky in Popély – Simon 2009: 195).

However, not everyone within the FMK's core group initially believed in the possibility of a radical regime change—not even Lajos Grendel. "I think that Károly Tóth, László Öllös, and Nóra Sándor were more radical about this. I did not believe the system could change. I believed—well, 1968 was a defining experience of my youth—that something similar could happen again. […] I did not believe that a radical regime change would occur. In fact, I only started to believe towards the end of 1989 that a real regime change would happen, and not just some sort of reshaping of the old system." (Lajos Grendel in Popély – Simon 2010: 134)

It is also noteworthy that the VPN, despite including former communists who were active until the regime change (apart from the reform communists),[12] adopted a strong-

12 According to Peter Zajac, a leading ideologist of the liberal wing of the VPN, its view on communists was that they fell into two categories: "immediately aware" (in Slov. *okamžite uvedomelí*) communists and "the rest" (*tí druhí*). The former quickly grasped the significance of the 1989 changes, while the latter "merely adopted the idea of change as a political badge, like a strategic mask needed at the time" (Zajac, Peter: Päť rokov po. Domino efekt 1994, no. 29, p. 7, cited in Pekník 2016: 42). Despite this distinction, both types of communists were represented within the VPN.

ly anti-communist stance. This was evident in their repeated calls at protests for the removal of "old structures" and slogans targeting communists, such as "*nie sme ako oni*," ("we are different/we differ from them"). However, due to a shortage of its own politicians and experts, the VPN soon had to involve not only '68ers but also active communists in the regime change process. This was likely done with the FMK's knowledge and consent,[13] though this was probably not a matter of contention since the FMK also included former party members.

The FMK's opposition to the FHCZ partly arose from concerns that the FHCZ was not truly committed to radical regime change. This suspicion was fueled by the FHCZ's origins with the '68ers, whom the FMK members may have believed still supported reforming socialism, as they frequently referenced the events of 1968.[14] This belief was further strengthened by the fact that their suggestion on November 25 for the FHCZ to join the VPN Coordination Committee, as the FMK had done, did not yield any practical results.[15]
In the period leading up to the establishment of Coexistence, the FMK grew increasingly concerned as its co-opted representatives began to assert their independence by raising Hungarian issues and diverging from the FMK's positions, especially on matters like the proposed Hungarian university in Czechoslovakia and criticism of the electoral law. "While democratic forces on both sides [i.e., in Slovakia and the Czech Republic] worked to dismantle communist power and risked their popularity, they were busy giv-

13 "The opposition and the various opposition movements in Slovakia were unprepared. They lacked information about how the regime change was unfolding. [...] They had no clear plans for the parliament, including what to do with it, how long it should operate, or who would govern the country. Both Slovak and Czech colleagues were uncertain in those early days. A Czech–Slovak coordination was established between Havel's and Budaj's teams in Prague and Bratislava. Without any pretense, I can say that we were the ones providing guidance. [...] In every major political issue, we not only shared our views but were also actively involved in decision-making, including personnel decisions" (László A. Nagy in Popély – Simon 2009: 425). Similarly, "It is important to note that during the initial period, the first six months to a year, we were politically much more active than the Slovaks" (László Gyurovszky in Popély – Simon 2009: 194).

14 László Dobos made the following statement six months later: "This time, it is not about reforming something, but about rejecting the previous, utterly unworkable structure" (Péter Miklósi: Interview with László Dobos, *Hét*, no. 26, June 29 1990, p. 2). By then, it had long been decided that the country would not continue in a reformist socialist direction.

15 According to László Öllös, "the fundamental expectation of the '68ers during the Gorbachev era was to regain their place within the party-state, obviously within a more open party-state, where they could, so to speak, dismantle the nationalism of the Husák regime and create positions for Hungarians. Essentially, they wanted to return to the 1968 model. That was what they knew and attempted to do." In contrast, the FMK "did not want this; they wanted pluralism. [...] They aimed to form a counterbalance to communism, even against a potentially reformed Communist Party or a party shaped by glasnost or perestroika, forcing it into public debate and organizing the Hungarian society in Slovakia. This was a fundamentally different strategy" (László Öllös in Popély – Simon 2009: 499–500).

ing campaign speeches and preparing for elections. They began what Miklós Duray referred to as the 'national class struggle' in Vienna."[16] This was particularly disappointing for the FMK members, who had relied on Miklós Duray to help overthrow the totalitarian regime. According to the FMK's press statement in April, they had "immediately made room for Dr. Miklós Duray, seeing him as the most credible and revolutionary figure among Hungarians in Czechoslovakia. They had hoped he would return from Budapest upon hearing of the revolution and take part in dismantling the party-state."[17]

After the establishment of Coexistence, the FMK criticized the political movement for being open to former communists. They remarked, "In the movement initiated by Miklós Duray, which was likely seen as very sincere, individuals who had been ousted from the party and its leadership during the November revolution are now becoming active again. This is frustrating for us, as the FMK also played a significant role in their removal."[18] Another similar view was expressed: "Coexistence brought together the 1968 generation [...] former communist leaders, local functionaries, agricultural leaders, district and municipal level communist mayors, and other officials. It also harbored hardline Hungarian nationalists from summer camps and clubs, with Miklós Duray leading them. He legitimized them; with his background in opposition, no local communist could be labeled a communist anymore—they had become nationalists. Initially, they were supported by *Új Szó*, which also included journalists with old party connections and those who saw us as revolutionary, immature youth. In contrast, they were experienced, well-known, and established figures in the Slovak Hungarian community" (László Öllös in Popély – Simon 2009: 516).

The FMK also criticized the founding charter of Coexistence for lacking explicit anti-communist criticism. While it is true that the founding charter, dated March 31, 1990,[19] did not include direct criticism of communism, the communist party's monopoly had already ended by that time. Thus, opposition to the totalitarian party-state was no longer relevant. Moreover, the movement's name "Együttélés–Spolužitie (Coexistence): A Political Movement for Democracy and the Rights of National Minorities" also supported democracy. Their founding charter stated that it would "work for democracy and

16 Károly Tóth: Hol fogunk élni? A Független Magyar Kezdeményezés a választások küszöbén (Where Will We Live? The Independent Hungarian Initiative on the Eve of the Elections), *Nap*, June 5, 1990, p. 5.

17 FMK Press Service: Vigyázó szemetek a jövőre vessétek... (Keep a Watchful Eye on the Future...) *Új Szó*, April 19, 1990, p. 3.

18 Péter Miklósi: Interjú Tóth Károllyal (Interview with Károly Tóth), *Hét*, no. 12, April 20, 1990, p. 2.

19 Source: [https://leveltar.adatbank.sk/gyujtemeny/az-egyutteles-politikai-mozgalom-alapito-levele/]

the rule of law," aiming to implement democratic principles in political practice and envisioning political representation only within a democratic, pluralistic system. This also implied rejecting the previously socialist, one-party political system. Moreover, it would have been difficult to imagine Miklós Duray, a long-time opposition figure, suddenly showing "understanding" toward the communist dictatorship right at the dawn of the new political era. At the same time, it is true that he did not lump former communists together and did not exclude them from Coexistence. In other words, he acted similarly to the VPN and the FMK. Like the VPN's,[20] Duray's actions were likely driven by political pragmatism, recognizing the importance of these individuals' professional expertise and local influence for Coexistence's success (meaning that political foresight and practical considerations likely influenced his decision).

In any case, when asked by a journalist about the widespread belief that "Coexistence is a gathering place for communists or former communists," he responded, "There is not a single political movement in Czechoslovakia today where former Communist Party members are not involved. This applies to OF, the VPN, the FMK, and perhaps all but the Christian Democrats. I must say that raising the issue in such a way is malicious, as Coexistence has no more former Communist Party members than any other group. I believe that judging people today solely on whether they were once part of the state party is unfair. It is thanks to honest individuals within the ranks of the communists that conditions did not deteriorate completely over the past twenty years, and that there was an internal opposition within the party that aimed to guide it toward a more moral path. In fact, 1968 happened because a fraction within the party rejected the traditional communist label. So, those who were party members but acted honorably and genuinely worked for societal improvement should not be condemned. It is also worth noting that many non-party members, who were the majority, might not have been innocent either. They could have been corrupt, compliant, and unprincipled supporters of the totalitarian power. The only fair way to assess people is by their character. Those who were dishonorable, whether inside or outside the party, should not be aligned with."[21]

20 Without their involvement, the VPN would not have won the first free elections. In the April 1990 public opinion poll, the VPN ranked fifth. By May, the KDH was still leading with 29.1%, but the VPN had risen to second place with 13.1%, closely followed by the KSS in third with 12.8% support (Pekník 2016: 37). Concerned about the KDH, which was also regarded as its main ally, the VPN strategically placed reformist-era and normalization communists at the top of its electoral list. This tactic proved successful (Krno – Slobodníková 2016: 71; Žatkuliak 2009: 20). László Öllös also observed that the VPN "did not have enough well-known, accepted figures to fill ministerial positions, so they had to seek people for the highest roles, which opened the door for the communists" (László Öllös in Popély – Simon 2009: 508).

21 János Mészáros: Ki képviseljen bennünket? Sajátos parlamenti képviselet kell. Beszélgetés dr. Duray Miklóssal, az Együttélés politikai mozgalom elnökével (Who Should Represent Us?

Coexistence faced accusations of harboring former communists throughout the election campaign. It is likely no coincidence that just before the elections, on June 6, 1990, the movement felt compelled to address this in an open letter to Czechoslovak Hungarians, urging them to participate. Among other things, they wrote: "Coexistence is accused of being a haven for communists and former party members. We firmly distance ourselves from those who bear real guilt, who were overly loyal servants or petty tyrants of the dictatorship throughout decades. However, our condemnation of the Communist Party's dictatorship does not mean we apply collective guilt. We do not wish to carry over or preserve any of the Communist Party's moral burdens or responsibilities. Only those free from moral and political burdens have a place within Coexistence and our electoral coalition partner, the MKDM. We believe in the people's right to hold their own opinions, and, in different circumstances, the right to change them too."[22]

The presence of former communists in Coexistence initially caused friction with its coalition partner, the MKDM, which was often cited as the only Hungarian party without former communists. László Gyurgyík recalls: "In the early days of Coexistence, in the first batch, there were quite a few former party members. Some of them were not just regular members either. For the MKDM members, this was somewhat of a scandal—what were these people doing here? These dynamics need to be taken into account. All of this unfolded very quickly, within a month or two, during the first election period" (László Gyurgyík in Popély – Simon 2010: 158).

We Need a Unique Parliamentary Representation. Interview with Dr. Miklós Duray, President of Coexistence Political Movement) *Új Szó*, April 2, 1990, p. 3.

22 Nyílt levél a csehszlovákiai magyarokhoz! (Open Letter to the Hungarians of Czechoslovakia!) *Új Szó*, June 6, 1990, p. 5. See also Václav Havel's response to a journalist's question in December 1989 about his relationship with the communists and the Communist Party: "'There are many intelligent, talented, creative people among them who were condemned to silence for decades, just like many of those who were not party members." The journalist asked, "Forgive me for interrupting, but did they really have to remain silent? It depended on their courage." Havel responded: "Perhaps they did not have to. But when they spoke up, it brought them trouble, or they were simply not listened to. I believe that our fellow citizens who were party members feel just as relieved as the rest of society because now they are being heard. And this is very important for society. I think the task of the communists is to renew their party as quickly as possible, to transform it into a modern party that renounces total control and enters the future pluralistic democratic system as any other political force. And this entire uprising—If we can call these dramatic events, currently unfolding and symbolized by the Civic Forum, an uprising—was not launched against the communists but against the system of total control." Párbeszéd két tüntetés között. Szükség van a toleranciára. Néhány kérdés Václav Havelhez (Dialogue between Two Protests. Tolerance is Needed. A Few Questions for Václav Havel) *Új Szó*, December 6, 1989, p. 4.

Incidentally, the MKDM's March 1990 program (K. Cséfalvay 1995: 45–49) did not contain an explicit anti-communist critique either; yet, this was not criticized by the FMK. However, the program did address the past in its 11th point, stating: "Our ideological approach is one of forgiveness. We believe that uncovering past mistakes and learning from them is more important for our future than holding all the guilty accountable." Like Coexistence, the MKDM rejected the idea of collective guilt for former communists. Additionally, in its 4th point, the MKDM endorsed the values of pluralism, the rule of law, and the welfare state—values that directly opposed the totalitarian party system.

The question arises: what saved the MKDM from facing the same criticism from the FMK as Coexistence had? Several factors could explain this. First, there were no former communists in the MKDM. Second, the FMK had a role in the founding of the MKDM, even though the party that ultimately emerged and the coalition that it entered for the parliamentary elections—specifically the alliance with Coexistence—did not align with the FMK and VPN's vision.[23]

To the FMK, Coexistence was seen as a direct challenge, a veritable low blow. Its founder, Miklós Duray, was serving in the Federal Assembly's Chamber of Nations as a delegate for the VPN and FMK.[24] However, the party that he had established had completely different priorities from those of the FMK. This is echoed in Károly Tóth's recollections: "Later, it seemed entirely natural to us that other parties were forming. We even considered creating a Hungarian agrarian or social democratic party. We were practically the ones who launched the Hungarian Christian Democratic Movement. [...] But what truly bothered us was that these parties were not focused on expanding freedom or playing by the rules; they were only interested in pushing us out of the political arena. And this was happening at the very start of the regime change. What outraged us even more was that some from our own ranks were starting parties based on national or other divides, which ran counter to the whole process. To us, liberalism at that time meant the legal enshrinement of freedoms and real regime change" (Károly Tóth in Popély – Simon 2009: 729–730).

Another factor for friction was the FMK's broader vision for regime change, which was not just about transforming the political system but also about reforming social orga-

23 Several people have mentioned this, including Kálmán Janics in K. Cséfalvay 1995: 13; Gyurgyík and Agárdy, and from the other side (Öllös in Popély – Simon 2009: 514), Tóth, and Gyurovszky.

24 On January 30, 1990, Miklós Duray was appointed to the Federal Assembly alongside 120 new representatives, filling the seats left vacant by those who had resigned, including eight Hungarian representatives (Popély – Simon 2009: 789).

nizations. The FMK sought to "depoliticize social organizations—most notably Csemadok—and envisioned a civil society where these organizations had clear, focused objectives" (Öllös 2004: 58). They believed that "under new laws, cultural and social activities should be clearly separated. This is why [they] 'attacked' Csemadok, asking it to undergo internal restructuring and focus on apolitical, value-driven cultural activities."[25] The FMK struggled to accept that Csemadok, while claiming to be a cultural organization, took on political roles by strongly supporting Coexistence in the name of Hungarian interests.[26] This made it even harder for the FMK to accept Coexistence, which was built on Csemadok's foundations.

It is important to consider that this division might have been a significant turning point if the other two Hungarian parties had also been formed in November 1989. In those early revolutionary days, when the situation was highly fluid and uncertain, with the possibility of a rollback, it was taken seriously to clearly and publicly condemn totalitarian ideology. However, by early 1990, after Coexistence and the MKDM had been established, the public discourse focused on other political topics and the approaching first free parliamentary elections. While emphasizing this division was understandable from the FMK's perspective, it was likely already part of the campaign strategy.

At the same time, the FMK (and the VPN) likely had genuine concerns that the Communist Party might perform well in the elections. According to public opinion polls, the Communist Party ranked second in April, while the VPN only placed fifth. Although the VPN managed to rise to second place by May, the Communist Party still held a strong third-place position (Laluha 2016: 440; Pekník 2016: 37). This likely explains why the FMK continued to stress the importance of uniting democratic forces. Károly Tóth's notably passionate remarks seemingly reflected this concern: "I believe there are two processes at work in today's political life. To counter the latent influence of the Communist Party, it is essential for democratic forces to unite or form temporary alliances. […] The issue of national minorities is particularly challenging. Anyone advocating for democracy in Slovakia today, rather than national democracy (which we have been opposing for 70 years), must weigh these factors. Otherwise, the noble ideal of democracy risks becoming a mere slogan, or through isolation, taking on a different meaning. […] The minority issue can only be resolved through a democracy that upholds the rights of minorities—whether political, religious, or national—as sacred and inviolable."[27]

25 Péter Miklósi: Interjú Tóth Károllyal (Interview with Károly Tóth), *Hét*, no. 16, April 20, 1990, p. 2.

26 It has since become clear that some parts of civil society in liberal democracies are not apolitical; on the contrary, they advance various political agendas.

27 Károly Tóth: A demokrácia esélyei avagy a többség hatalma és a kisebbség joga (The Chances of Democracy, or the Power of the Majority and the Rights of the Minority), *Nap*, May 8, 1990, p. 5.

In hindsight, it appears that this fault line was mainly about establishing who the real leaders of change were. For the FMK, this was a much more crucial issue than it was for Coexistence or the MKDM. The FMK criticized Coexistence for not prioritizing this, suggesting they were not truly committed to dismantling the party-state. The FMK likely felt frustrated that it had to handle the difficult, unpopular tasks while the other two parties were benefiting from the path it had paved, and were even trying to take credit for it.[28]

"We participated in a revolution, and our achievements should not be underestimated," said Károly Tóth before the first FMK assembly on February 21, 1990.[29] At the press conference following the assembly on February 26, FMK representatives detailed these achievements: "The FMK played a key role in overthrowing the dictatorial regime, dismantling the state power structure in Hungarian-populated areas, participating in government formation talks, and nominating Sándor Varga as deputy prime minister.[30] It also proposed delegates for parliament and the Slovak National Council.[31] However, its most significant achievement was the joint declaration with the VPN, published in the Verejnosť and NAP newspapers. The declaration represented a unique political platform in Europe bridging the majority and a national minority."[32]

The facts listed above are undeniable to the FMK, and even if Coexistence and the MKDM had wanted to, they could not have claimed these for themselves. However, with

28 The VPN perceived this issue in the same way. In the May 8, 1990, edition of *Verejnost'*, the VPN's daily newspaper with a circulation of 200,000, an article titled "Az ötös szám esélyei" (The Chances of Number Five, *Šance čísla päť*) describes the VPN as "a person in dirty work clothes, working in a barn, who has somewhat cleaned it up, while citizens standing further away, dressed in white, ironed shirts, look at them with mixed feelings." The article admits that the "cleaning of the barns" with its radical steps might have caused public displeasure and that the VPN's "minor failures or mistakes were much more noticeable in their own environment than the overall social benefits that resulted" (cited in Pekník 2016: 40). The FMK had similar grievances.

29 József Szilvássy: Az első közgyűlés előtt (Before the First Assembly), *Új Szó*, February 21, 1990, p. 4.

30 In the Slovak government re-formed on December 12, 1989, with Milan Čič as the prime minister, Sándor Varga became the first deputy prime minister of Hungarian nationality in the Slovak government.

31 On February 9, 1990, Gábor Zászlós was elected as the Vice President of the Slovak National Council and the Chairman of the National Committee. He had been nominated by the FMK and became a parliamentary representative of the VPN on January 12 (Popély – Simon 2009: 788).

32 Már a választások jegyében. Megtartotta első országos közgyűlését a Független Magyar Kezdeményezés (Under the Auspices of the Elections. The Independent Hungarian Initiative Held Its First National Assembly), *Új Szó*, February 26, 1990, pp. 1–2. For more details about this event, see Chapter 5.

the establishment of a pluralistic democracy, they too had the right to enter the political arena and be evaluated based on their own vision, not the FMK's, in the first free parliamentary elections and later in the local elections. This independent vision, however, heightened the tensions between the FMK and Coexistence, and later between the FMK and the Coexistence–MKDM coalition, deepening the fault lines and leading to a tough election campaign.

Minority rights versus democracy?

Another factor as a fault line between the Hungarian parties was the following issue: the creation of democracy is the primary goal from which minority rights can be derived (as pursued by the FMK) versus the idea that democracy alone does not guarantee minority rights so these must be addressed as a priority (as pursued by Coexistence). The essence of this second fault line was what the parties considered their primary goals: democratic regime change or minority protection. The fundamental question that divided the political elite was whether minority rights, like other rights, could be guaranteed by democracy—even if not automatically—or whether democracy alone does not guarantee minority rights, making it essential for a party identifying as Hungarian to prioritize the latter. Simplified, the question was: should we primarily be democrats or Hungarians? This is the dilemma that Lajos Grendel mentioned during a December 1989 roundtable discussion in *Új Szó*, which he resolved by emphasizing the primacy of achieving democracy. On the other hand, László Dobos believed that both tasks should be addressed simultaneously (i.e., one should be both democratic and Hungarian), or at the very least, the nationality issue should not be relegated to second place. Both of them were right; it is evident when referring back to their conversation, especially the part where Dobos, essentially foreshadowing the position of Coexistence, stated that the generation of 1968 was more radical than the FMK. Grendel responded by saying they were also radical, just in a different way. The FMK was radical in terms of thorough regime change, while Coexistence was radical regarding the national minority issue.

The word "democracy" was one of the most frequently used terms during the regime change. Traditionally, democracy is defined as an "institutional arrangement for arriving at political decisions which realizes the common good by making the people itself decide issues through the election of individuals who are to assemble in order to carry out its will" (Schumpeter 1943: 269). What is clear is that democracy cannot coexist with oppressive regimes. Yet, this left room for different interpretations. For example, Pál Csáky of the MKDM explained his view of democracy as follows: "We need to understand that democracy is in constant motion, a continuous struggle. The seemingly calm surface of functioning democracies is actually a balance of ongoing internal tensions. Democracy does not suppress this struggle; it encourages it, as it is one of its essential

elements. At the same time, unlike dictatorships, it offers everyone a chance to compete—the more humane a democracy, the more varied these opportunities become."[33]

No Hungarian party or public figure questioned the need to establish a democratic system to replace the communist regime, nor did they dispute the importance of representing and protecting minority rights. However, "the order of priorities sparked lengthy political debates among the Slovak Hungarians" (Öllös 2004: 57). The FMK's response to the question "Who are we?" was that "on the one hand, we are democrats, and on the other hand, we are Hungarians" (Öllös 2004: 57). This approach placed the two qualities side by side rather than prioritizing one over the other. László Gyurovszky, a spokesperson for the FMK, made it clear that democracy took precedence over the situation of the Hungarian minority when he stated: "Our starting point is democracy, not the position of the Hungarian minority. [...] The key priority now is to support democratization efforts in Slovakia. We firmly believe that parliamentary democracy is the only way to address and resolve problems and conflicts, as it allows for the free expression, articulation, and confrontation of interests."[34] This view was supported by the FMK's program, which integrates national rights with human and civil rights (Öllös 2004: 57).

This does not mean that the FMK undervalued minority rights. In fact, they emphasized that human rights, including national minority rights, can only be fully realized within a democratic framework. They believed that societal renewal should start with establishing a democratic state that upholds general human rights. Minority rights do not "automatically follow in a civil democracy, but a democratic system is the only place where they can be effectively protected."[35] Thus, "democracy is not an end in itself but a tool; it provides the space needed to protect our interests if we choose to. Establishing democracy is a national interest for the Slovak Hungarian minority. [...] Protecting minority rights can only succeed through the political mechanisms offered by democracy. We aimed to advance our rights protection work by engaging in the centers of political decision-making and avoiding marginalization in political life,"[36] Lajos Grendel explained in his writings.

Coexistence recognized the importance of building democracy, as outlined in its founding charter, approved at the inaugural assembly in Bratislava on March 31, 1990, which

33 Pál Csáky: Demokráciát? Igen! De milyet? (Democracy? Yes! But What Kind?), *Új Szó*, April 7, 1990, p. 4.

34 László Gyurovszky, FMK spokesperson: Mi nem autonómiára törekszünk! (We are not seeking autonomy!) The interview was conducted by Ildikó Haraszti, *Új Szó*, December 2, 1989, p. 4.

35 S. László Gyurovszky: Napjaink kisebbségi stratégiái (Current Minority Strategies), *Nap*, March 13, 1990, pp. 1–2.

36 Lajos Grendel: Választások előtt (Before the Elections), *Nap*, May 18, 1990, p. 4.

stated its commitment to "work for democracy and the rule of law." However, unlike the FMK, Coexistence prioritized a strong representation of minority rights. This focus arose from the belief that the FMK was not sufficiently active or effective in this area. For example, the rejection of Miklós Duray's ministerial appointment dealt a significant blow to the FMK's position to represent minority issues. Had this appointment been approved, Hungarian politics in Slovakia might have unfolded differently.

The need for a new party dedicated to defending the Hungarian minority therefore seemed justified, even though the FMK had addressed these issues from the start, albeit through its own approach. The founders of the new Hungarian parties felt that the FMK's efforts were insufficient. Coexistence saw this as a "gap in the market" that it could fill, along with an additional opportunity to advocate for the rights of other national minorities. Furthermore, intensifying interethnic tensions after January 1990, along with the shifting public sentiment, led some Hungarians in Slovakia to demand stronger protection for minority rights.

Before the establishment of Coexistence, Miklós Duray met with Hungarians from Rimavská Sobota, Lučenec, and Fiľakovo at a public forum between January 4 and 6, 1990. Citing their opinions, concerns, and expectations, he proposed the creation of a working committee to examine "how to effectively protect and politically represent national minorities within a multiparty system."[37] As mentioned above, at the Csemadok Presidium meeting on January 6, with Miklós Duray in attendance, there was strong support for creating a party that would "in a pluralistic society, aim to establish and protect the equal rights and collective rights of national minorities in [their] country."[38] This focus was on protecting not just the rights of the Hungarian minority but also those of other national minorities as well. Coexistence believed that Hungarian advocacy could not be separated from "the similar needs of other national minorities. Therefore, [it] believe[d] that this task should be undertaken together with other national minorities, along with the protection of the interests of the entire population, including the Slovaks, living in areas inhabited by national minorities."[39]

Duray saw this as the main difference between the FMK and Coexistence, and highlighted it in a statement on February 24, 1990: "The difference is that we want

37 Nemzetiségi kisebbségünk jogvédelméről (On the Protection of Our National Minority Rights), *Új Szó*, January 9, 1990, p. 8.

38 Kétnapos tanácskozás a Csemadok helyzetéről és jövőjéről (Two-Day Conference on the Situation and Future of Csemadok), *Új Szó*, January 8, 1990, pp. 1–2.

39 Source: [https://duray.sk/1990/05/epm-program/; https://duray.sk/1990/02/epm-alapitasa/]

Coexistence to be a movement not just for the Hungarian national minority but for all people in Slovakia living in areas where the majority and national minorities coexist. We aim to enforce international human rights, political, and civil rights agreements, including the resolution of the International Human Rights Federation on national minority rights from last January. Our goal is to ensure that these principles are upheld in Czechoslovakia through legislation. We want national minorities, alongside the Czechs and Slovaks, to feel that they are actively involved in shaping democratic conditions—not just as citizens of Czechoslovakia but as members of the national minorities as well."[40] He echoed this idea elsewhere: "One of our main objectives is to establish political norms for the mutual relations and coexistence of Hungarians, Slovaks, and other national minorities. This should be governed not only by principles but also by formal agreements."[41]

In fact, Duray did not view Coexistence as a national party, as one of his statements reveals: "I support party politics, but I do not see our political activity within a national party. Instead, I see it in a party that represents the interests of regions where Hungarians, Ukrainians, Germans, and possibly Poles live alongside Slovaks and Roma. We need to establish political norms for coexistence, protect the rights of national minorities, and safeguard the economic interests of these regions."[42] In today's terms, he envisioned a regional party.

Understanding that Coexistence aimed to enforce human rights documents begs the question: was it not their primary goal "to establish democratic conditions?" However, there is a key difference in perspective. Coexistence's program highlighted a crucial

40 János Mészáros: Hír van, memorandum nincs! (The News Is There but No Memorandum!), *Új Szó*, February 24, 1990, pp. 1–2. In February, Csemadok reached out to the Polish Cultural Association. Among other things, they presented "the formation of the Coexistence political movement, which, following the spirit of the Helsinki Final Act and the Vienna follow-up meeting, had taken on the legal representation of national minorities and ethnic groups. The movement also planned to participate in the elections that year, in line with party laws. Csemadok representatives stressed that Coexistence was open to everyone, regardless of ethnicity, political affiliation, or membership in other organizations. Representatives of the Polish association welcomed the news and expressed interest in connecting with the movement's founders." Lengyelek, magyarok - egy asztalnál (Poles, Hungarians—at the same table), *Új Szó*, February 16, 1990, p. 8. On March 31, 1990, at the founding assembly of Coexistence in Bratislava, Stanislaw Gawlik, the chief secretary of the Polish association, became Coexistence's vice president and was elected as a member of parliament in the first free elections under Coexistence banner.

41 Péter Miklósi: Interjú Duray Miklóssal (Interview with Miklós Duray), *Hét,* no. 12, March 23, 1990, p. 2.

42 József Mács: A látható Duray (The Visible Duray), *Hét*, no. 8. February 23, 1990, p. 7.

divergence from the FMK's position. While the FMK believed that democracy would guarantee minority rights—and that only democracy could do so—Coexistence argued that "democracy alone (if it functions in the traditional sense and follows the rule of the majority) [...] does not provide enough room for the legitimate interests of national minorities to be realized. It is a naïve illusion to think that these principles and systems will automatically solve the national minority issue and free minorities from the constraints of their status. The solution to the minority issue lies in legal protection for minorities alongside majority dominance. And this can only happen through proper political representation, laws, and binding agreements."[43]

In other words, we can conclude that Coexistence fully recognized the importance of establishing democracy. However, they had serious reservations about whether the FMK could effectively represent and protect minority rights within the new democratic framework. In fact, it was not just a doubt but rather a certainty, as Miklós Duray made clear in one of his statements: "Those who have represented the Hungarian community in Czechoslovakia in the Federal Assembly or the Slovak National Council so far either could not represent our interests or were unwilling to do so as needed."[44]

Iván Gyurcsík, the secretary-general of Coexistence, echoed this view: "Miklós Duray returned to Europe from the United States in November after more than a year and a half. In early December, when the negotiations for forming the federal government began, he participated in them. In January, after discussions in various towns and villages in southern Slovakia, he assessed the changing situation. There was a strong demand for a political movement to advocate for national minority rights. We were also motivated to act because we could not support the indiscriminate and harsh attacks on the institutions of the Hungarian community in Czechoslovakia, nor could we agree with certain discriminatory aspects of the electoral law. While our goals are the same, we see a different path to achieving them. This is why Miklós Duray founded the Coexistence political movement, a step that was only natural in the emerging democracy."[45]

43 Source: [https://duray.sk/1990/05/epm-program/]

44 János Mészáros: Ki képviseljen bennünket? Sajátos parlamenti képviselet kell. Beszélgetés dr. Duray Miklóssal, az Együttélés politikai mozgalom elnökével (Who Should Represent Us? We Need Special Parliamentary Representation. A Conversation with Dr. Miklós Duray, President of Coexistence Political Movement), *Új Szó*, April 2, 1990, pp. 2–3.

45 Gyula Bodnár, József Szilvássy, László Zsilka: Különböző utakon nemzeti kisebbségünk jogaiért, érdekeink képviseletéért. Kerekasztal-beszélgetés a magyar politikai mozgalmak képviselőivel (Different Paths for Representing Our Minority Rights and Interests: A Roundtable Discussion with Representatives of Hungarian Political Movements), *Új Szó*, May 25, 1990, pp. 4–5.

The situation was further complicated by the FMK's stance: although they actively and strongly addressed minority issues from the outset, they consistently emphasized that their priority was achieving democracy, not minority rights. Moreover, their approach to managing the escalating interethnic tensions neither helped nor harmed their position.

The MKDM aligned with Coexistence on this fault line. Kálmán Janics, the president of the MKDM, also found the FMK's approach to minority rights unsatisfactory. In his view, as expressed in the following statement, the MKDM was formed due to the insufficient representation of minority rights: "By the end of January, it became clear to me that there was no genuine interest from Slovak political movements or the emerging parties in objectively addressing issues concerning national minorities. [...] Over the past few months, I have repeatedly stressed that we expect to hear at least as much about our minority rights, cultural and educational self-governance, and true equality as Alexander Dubček, the then-communist leader, promised in his party's action program in April 1968. Until we see signs of this, our distrust is justified. This is why the Hungarian Christian Democratic Movement came into being."[46]

The central issue, when considering the dilemma of being either democrats or Hungarians, was that both Coexistence and the MKDM—but particularly Coexistence—saw FMK as not sufficiently Hungarian. The FMK's decision to run on the VPN's list in the first free elections made them seem almost like traitors in Coexistence's eyes. Conversely, from the FMK's perspective, Coexistence appeared overly nationalistic and too focused on Hungarian identity. This marked the beginning of the long-standing debate over who were the good Hungarians and bad Hungarians. At the same time, in Slovak political circles and public opinion, Coexistence was viewed as the minority protection party, which, in their interpretation, meant a nationalist, even chauvinistic and irredentist, Hungarian party. Although some Slovaks saw the FMK in a similar light, it was not to the same degree as Coexistence. This mistrust was one of the causes that made it difficult for Slovaks to fully trust Coexistence.

Károly Tóth's statement made on February 21, 1990, is noteworthy in this context: "The FMK does not want to obsess over being Hungarian. For us, it is simply a matter of our existence. So far, two Hungarian political forces have emerged: the FMK and the Hungarian Christian Democratic Movement (while the Hungarian Student Association remained an advocacy group). Neither denied their Hungarian identity, and neither made it an issue in political life. Interestingly, both parties clearly defined their political stances, and neither faced significant accusations of being too Hungarian by 'the

46 Péter Miklósi: Interjú Janics Kálmánnal (Interview with Kálmán Janics), *Hét*, no. 29, July 20, 1990.

Slovak side.' However, many accuse us of collaborating with the Slovaks. I must say, there is no real answer to such accusations. It is difficult to argue with primitiveness, demagoguery, and rumors, especially when they stem from nationalistic fervor. (As Miklós Szabó writes, for the nationalist mindset, there is no such thing as 'otherness'—only a lack of nationalism or outright national betrayal.) We do not want to make a big issue out of this because defending ourselves would only mean trying to prove that we are indeed Hungarian. We already know that, and trying to convince them would be futile. We greatly respect Coexistence's principles. Since November 17, we too have been striving to coexist with other political forces and nationalities. How much this needs to be politically emphasized is something we already discussed back in early December in Prague with Mr. Pavel Muraško, head of the Civic Forum's nationalities department, whom we respect as the father of this idea. We have also had several discussions on this matter with Miklós Duray."[47]

The party's spokespeople reiterated this stance during a press conference after the FMK's first general assembly. When asked about their relationship with Coexistence, they responded that they "see no value in forming parties based on nationality affiliation."[48]

47 József Szilvássy: Az első közgyűlés előtt. Beszélgetés Tóth Károllyal, a Független Magyar Kezdeményezés szóvivőjével (Before the First General Assembly. Interview with Károly Tóth, spokesperson of the Independent Hungarian Initiative), *Új Szó*, February 21, 1990, p. 4.

48 Már a választások jegyében. Megtartotta első országos közgyűlését a Független Magyar Kezdeményezés (Already in the spirit of elections. The Independent Hungarian Initiative held its first national assembly). *Új Szó*, February 26, 1990, pp. 1–2.

Press sources

Hét (Hungarian weekly edited in Bratislava)
Nap (edited in Bratislava)
NRC Handelsblad (Rotterdam)
Új Szó (Hungarian daily edited in Bratislava)
Szabad Kapacitás (edited in Bratislava)

Literature

Agárdy, Gábor 1995. A megalakulás időszaka. In: K. Cséfalvay, Eszter (ed.): *Közösségünk szolgálatában*. Bratislava: MKDM, 1995, 23–35.

Alijeva, Dilbar 1990. Nezáväzné poznámky na margo pojmu „ludové masy". In: *Sociológia* 22, 1990/4, 443–451.

Bárdi, Nándor 2000. Törésvonalak keresése és összehasonlítása a határon túli magyar politikában 1989–1998 [Searching for and comparing fault lines in Hungarian politics abroad 1989–1998]. In: *Fórum Kisebbségtudományi Szemle* 2000/1, 47–68.

Bárdi, Nándor – Éger, György (szerk.). *Útkeresés és integráció. Határon túli magyar érdekvédelmi szervezetek dokumentumai 1989-2000.* [http://adatbank.transindex.ro/inchtm.php?akod=159]

Blaha, Ľuboš 2016. Slovensko a otázka sociálneho štátu. In: Pekník, Miroslav a kol: *Pohľady na slovenskú politiku po roku 1989*, I. časť. Bratislava: Ústav politických vied SAV, Veda, Vydavateľstvo SAV, 2016, 364–388.

Bútorová, Zora 2019. *30 rokov po Nežnej revolúcii. Zisky a straty očami verejnosti*. Inštitút pre verejné otázky, Bratislava, 2019.

Čarnogurský, Ján 1995. A kereszténydemokrácia Szlovákiában a kommunizmus bukása után. In: K. Cséfalvay, Eszter (szerk.): *Közösségünk szolgálatában*. MKDM, Pozsony, 1995.

Čič, Milan 2016. Reminiscencie na november 1989. In: Pekník, Miroslav a kol: *Pohľady na slovenskú politiku po roku 1989, I. časť*. Bratislava: Ústav politických vied SAV, Veda, Vydavateľstvo SAV, 2016, pp. 325–337.

Dilbar, Alieva (ed.) 2020. *Anatómia revolúcie: Historické poučenia a sociologické analýzy*. Bratislava: Sociologický ústav SAV, p. 159.

Dinuš, Peter 2015. *Politika bez masky*. Veda, Vydavateľstvo SAV, Bratislava, 2015.

Dinuš, Peter 2016. Základné smery vývoja ponovembrového politického myslenia. In: Pekník, Miroslav a kol: *Pohľady na slovenskú politiku po roku 1989*, I. časť. Bratislava: Ústav politických vied SAV, Veda, Vydavateľstvo SAV, 2016, 585–601.

Frič, Pavol – Dobrovodský, Mário 1990. Problémové pole Slovenska očami verejnosti. In: *Sociológia* 22, 1990/5, 525–535.

Gyárfásová, Oľga 2011. *Voličské správanie na Slovensku. Teória, trendy, výskum*. Bratislava: Renesans, 2011.

Janics, Kálmán 1995. Magyar kereszténydemokrata mozgalmak Csehszlovákiában és Szlovákiában. In: K. Cséfalvay, Eszter (szerk.): *Közösségünk szolgálatában*. MKDM, Pozsony, 1995, 11–17.

Hamberger, Judit 2004. A Magyar Koalíció Pártja a szlovák kormányban. In: Fazekas, József – Hunčík, Péter (szerk.): *Magyarok Szlovákiában 1989–2004*. Somorja – Dunaszerdahely, Fórum Kisebbségkutató Intézet – Lilium Aurum, 2004, 105–124.

Karásek, Jozef 1990. K problémom rezpezentatívnosti výskumov Ústavu pre výskum verejnej mienky Slovenského štatistického úradu v Bratislave. In: *Sociológia* 22, 1990/5, 547–559.

K. Cséfalvay, Eszter (szerk.) 1995. *Közösségünk szolgálatában*. MKDM, Pozsony.

Kolektiv pracovníkov Institutu pro výzkum veřejného mínení, Praha, 1990. Z výskumu veřejného mínení v době sametové revoluce. In: *Sociológia* 22, 1990/5, 535–546.

Kmeť, Norbert 2015. Politická história a spoločnosť po roku 1989 In: *Studia politica slovaca*, 2015/2, 5–22.

Kmetty, Zoltán – Tóth, Gergely 2011. A politikai részvétel három szintje. In: Tardos, Róbert –

Enyedi, Zsolt – Szabó, Andrea (szerk.) 2011: *Részvétel, képviselet, politikai változás*. Demokrácia Kutatások Magyar Központja Alapítvány, Budapest, 2011, 75–115.

Krapfl, James 2009. *Revolúcia s ľudskou tvárou. Politika, kultúra a spoločenstvo v Československu po 17. novembri 1989*. Bratislava: Kalligram, 2009.

Krejčí, Oskar 2016. Záhadný listopad. In: Pekník, Miroslav a kol: *Pohľady na slovenskú politiku po roku 1989*, I. časť. Bratislava: Ústav politických vied SAV, Veda, Vydavateľstvo SAV, 2016, 306–320.

Krivý, Vladimír 2004. *Kolektívne identity na súčasnom Slovensku*. Centrum excelentnosti "Kolektívne identity," research report.

Krno, Svetozár – Slobodníková, Marcela 2016. Politické strany a hnutia na Slovensku. In: Miroslav Pekník a kol: *Pohľady na slovenskú politiku po roku 1989*, II. časť, Ústav politickych vied SAV, Veda, Vydavateľstvo SAV, Bratislava 2016, 66–113.

Krno, Svetozár 2017. Nastáva koniec dominancie tradičných politických strán? In: *Politické vedy* [online]. 20. roč., 2017/1, 34–46.

[http://www.politickevedy.fpvmv.umb.sk/archiv-vydani/2017/1-2017/svetozar-krno.html]

Laluha, Ivan 2016. Východiská a cesty k vzniku Slovenskej republiky v roku 1993. In: Pekník, Miroslav a kol: *Pohľady na slovenskú politiku po roku 1989*, I. časť. Bratislava: Ústav politických vied SAV, Veda, Vydavateľstvo SAV, 2016, 428–548.

Lubelcová, Gabriela 1999. Základné trendy a riziká vývoja kriminality na Slovensku v rokoch 1989-1999. In: *Sociológia* 31, 1999/5, 497–502.

Machonin, Pavel 1999. Několik úvah sociologa o vztazích Slováku a Čechu. In: *Sociológia* 31, 1999/5, 423–443.

Matejko, Alexander J. 1991. Občianska kultúra vo východnej Európe. In: *Sociológia* 23, 1991/1–2, 71–86.

Marušiak, Juraj 2015. Slovensko a Maďarsko – spojenectvo s historickou záťažou. In: *Studia politica slovaca*, 2015/2, 41–55.

Öllös, László 2004. A magyar pártok programjai. In: A rendszerváltás magyar szemmel. In: Fazekas, József – Hunčík, Péter (szerk.): *Magyarok Szlovákiában (1989-2004)*. Fórum Kisebbségkutató Intézet, Lilium Aurum, Somorja, Dunaszerdahely, 2004, 51–78.

Paukovič, Vladimír 1991. Národnostné vzťahy v národnostne zmiešaných oblastiach Slovenska z hľadiska pôsobenia etnicky orientovaných združení. In: *Sociológia* 23, 1991/1–2, 126–138.

Pekník, Miroslav 2016. Premeny slovenskej politiky. In: Pekník, Miroslav a kol: *Pohľady na slovenskú politiku po roku 1989*, I. časť. Bratislava: Ústav politických vied SAV, Veda, Vydavateľstvo SAV, 2016, 11–306.

Petőcz, Kálmán 2014. Svitlo ľudským právam na Slovensku na lepšie časy? In: Bútorová, Zora – Kollár, Miroslav – Mesežnikov, Grigorij (eds.): *Desať rokov v Únii: Slovenská a česká cesta*. Inštitút pre verejné otázky, Heinrich-Böll-Stiftung, Bratislava, 2014, 55–67.

Petrovičová, Eleonóra – Pollák, Pavel 2016. Vláda národného porozumenia. In: Pekník, Miroslav a kol: *Pohľady na slovenskú politiku po roku 1989*, I. časť. Bratislava: Ústav politických vied SAV, Veda, Vydavateľstvo SAV, 2016, 389–428.

Plávková, Oľga, 2016. November 1989 z pohľadu verejnej mienky. In: Pekník, Miroslav a kol: *Pohľady na slovenskú politiku po roku 1989*, I. časť. Bratislava: Ústav politických vied SAV, Veda, Vydavateľstvo SAV, 2016, 337–374.

Poláčková, Zuzana, 2015. Maďarská menšina v procese transformácie po roku 1989: typológia prechodu od partikulárneho k občianskemu. In: *Studia politica slovaca*, 2015/2, 22–40.

Popély, Árpád – Simon, Attila (eds.) 2009, 2010. *A rendszerváltás és a csehszlovákiai magyarok. I. és II. 1989–1992*. Somorja: Fórum Kisebbségkutató Intézet.

Sándor, Eleonóra 2004. A rendszerváltás magyar szemmel In: Fazekas József – Hunčík Péter (szerk.): *Magyarok Szlovákiában (1989-2004)*. Fórum Kisebbségkutató Intézet, Lilium Aurum, Somorja, Dunaszerdahely, 2004, 23–50.

Scheinost, Miroslav 1999. Základní trendy a rizika ve vývoji kriminality v letech 1989-1998 v České republice. In: *Sociológia* 31, 1999/5, 502–514.

Schumpeter, Joseph A. 1943. *Capitalism, Socialism and Democracy*. London, G. Allen & Unwin Ltd.

Semjén, András 1999. A svéd jóléti rendszer átalakulása. In: *Közgazdasági Szemle*, 1999 április, 326–345.

Simon, János 1996. A demokrácia értelmezése a posztkommunista országokban. In: *Szociológiai Szemle*, 1996/1, 113–157.

Šikula, Milan 2016. Ekonomický vývoj samostatného Slovenska. In: Pekník, Miroslav a kol: *Pohľady na slovenskú politiku po roku 1989*, II. časť. Bratislava: Ústav politických vied SAV, Veda, Vydavateľstvo SAV, 2016, 325–364.

Sopóci, Ján 2002. *Sociológia politiky*. Univerzita Komenského Bratislava, 2002.

Sopóci, Ján 2004. *Kolektívne správanie a sociálne hnutie*. Univerzita Komenského Bratislava, 2004.

Standin, G. 1997. Social Protection in Central and Eastern Europe: a Tale of Slipping Anchors and Torn Safety Nets. In: Esping-Andersen G. (ed.): *Welfare State in Transition*. London, Thousand Oaks, New Delhi: SAGE Publications, 1997.

Steiger, Štěpán 2005. Proměny švédského sociálního státu. In: *Listy* 2005/3 [http://www.listy.cz/archiv.php?cislo=053&clanek=030514]

Stena, Ján 1991. Utváranie občianskej spoločnosti ako rozvojový problém súčasného Slovenska. In: *Sociológia* 23, 1991/1–2, 7–27.

Szarka, László 2004. Kisebbségi többpártrendszer és közösségépítés. A szlovákiai magyar pártok működése 1989-1998. In: A rendszerváltás magyar szemmel In: Fazekas József – Hunčík Péter (szerk.): *Magyarok Szlovákiában (1989-2004)*. Fórum Kisebbségkutató Intézet, Lilium Aurum, Somorja, Dunaszerdahely, 2004, 79–104.

Szomolányi, Soňa 1999. *Kľukatá cesta Slovenska k demokracii*. STIMUL, Bratislava, 1999.

Szomolányi, Soňa 2020. Udalosti jesene 1989 v stredovýchodnej Európe a Arabskej jari 2011 — boli to revolúcie? In: Dilbar, Alieva (ed.): *Anatómia revolúcie: Historické poučenia a sociologické analýzy*. Bratislava: Sociologický ústav SAV, 73–84.

Valuch, Tibor 2013. „Ne szólj szám…“ A politikai részvétel és a politikai aktivitás néhány sajátossága az ezredforduló Magyarországán. In*: METSZETEK*, 2013/2-3, 146–155.

Zeman, Milan 2019. *Osudové osmičky 2018 a Nežná revolúcia - ponovembrový vývoj 2019*. Sociologický ústav SAV, Bratislava, 2019.

Žatkuliak, Jozef a kol. 2009. *November '89 Medzník vo vývoji slovenskej spoločnosti a jeho medzinárodný kontext*. Bratislava: Historický ústav Slovenskej akadémie vied vo vydavateľstve Prodama, 2009.

Zsolt Mikula

In the Shadow of Social Inequality: Homelessness

Abstract. The study adopts a critical approach to examine the challenges of measuring and researching homelessness, emphasizing the complex interplay between structural factors and social processes. Drawing on a literature-based theoretical framework, it integrates comparative analyses and policy recommendations to synthesize existing knowledge and promote the practical application of multidimensional approaches. The research highlights how socioeconomic inequalities, housing market deregulation, and punitive homelessness policies exacerbate structural barriers, further entrenching social exclusion. The study underscores the necessity of integrated social policy interventions and advocates for empirically validated strategies, such as the Housing First approach, legal anti-segregation measures, and cross-sectoral collaboration. Qualitative comparative analyses confirm that policies based on criminalization hinder social reintegration, whereas rights-based housing models, such as those implemented in Portugal and Scotland, promote long-term stability and social inclusion. Furthermore, the study calls for the broader application of the ETHOS model, which enhances the international comparability of homelessness definitions and improves the efficiency and impact of targeted policy interventions. By framing homelessness as a structural issue rather than an individual failure, the research advocates for a paradigm shift toward comprehensive, interdisciplinary solutions that integrate housing security, employment accessibility, and mental health support as fundamental pillars of social policy decision-making.

Keywords: homelessness measurement; social policy strategies; multidimensional approaches; ETHOS model; housing crisis management; social reintegration

https://doi.org/10.61795/fssr.v27y2025i5.06

Introduction

Extensive research indicates that homelessness should not be viewed solely as a shortcoming of social welfare systems but rather as a global manifestation of social exclusion and deprivation, the intensification of which presents significant social and economic challenges for both developed and developing nations[1] (Olsen & Benjaminsen

1 According to the United Nations (2000) report (https://digitallibrary.un.org/record/623546?v=pdf ; last accessed 01.12.2024.), urbanization and regional economic inequalities have exacerbated homelessness, posing significant challenges even for wealthier nati-

2018; EESC Lisbon Declaration 2021[2]). Over the past decades, homelessness has evolved into an increasingly pressing global social issue.[3] At the turn of the millennium, an estimated 100 million people were experiencing homelessness, while the number of individuals living in inadequate housing conditions exceeded 1 billion—implying that approximately one in seven people worldwide was directly affected by substandard living conditions (United Nations 2000).[4]

Focus of the Study

Homelessness represents one of the most extreme manifestations of social inequality.[5] This study critically examines the conceptual frameworks of homelessness, identifying key factors that hinder the international comparability of measurement methods and research findings.

Particular emphasis is placed on the diversity of social policy responses, highlighting the structural factors and institutional mechanisms that contribute to the persistence

ons due to the rising number of individuals living in worst-case conditions (Steffen et al. 2015; Alvarez & Steffen 2023). Data from 2001 indicate that in the United States, 5.3 million households lacked adequate housing conditions, while in Europe, this figure reached nearly 15 million (Bakos, n.d.).

2 [https://ec.europa.eu/commission/presscorner/detail/en/ip_21_3044; last accessed 21.03.2025.]

3 Similarly, data published in Győri's study (2020) reveal a significant increase in the number of people experiencing homelessness in Hungary. While only 278 individuals were officially registered as homeless in 1990, the 2001 census recorded 4,629, and by 2011**,** this number had surged to 12,347**.** According to the census data from the Hungarian Central Statistical Office (KSH 2022; https://nepszamlalas2022.ksh.hu ; last accessed 15.01.2025.), the recorded number of homeless individuals was significantly lower than earlier estimates. In 2011, a total of 5,557 people were registered as homeless, including 4,520 men and 1,051 women. By 2022, this figure had decreased to 2,615, comprising 2,029 men and 586 women.

4 Olsen and Benjaminsen (2019) highlight in their study that a decade later, by 2010, this figure had risen to 1.6 billion**,** indicating the escalation and global proliferation of the issue.

5 The 2019 United Nations General Assembly in Nairobi (https://www.un.org/development/desa/dspd/wp-content/uploads/sites/22/2019/10/summary-egm-final-9sep.pdf; last accessed 07.01.2025.) focused on the eradication of homelessness, emphasizing the crucial role of social protection and affordable housing. The report highlighted that homelessness represents the most extreme form of poverty and social exclusion, posing a global challenge for both developed and developing countries. The document underscores that effective social protection measures and widely accessible, affordable housing solutions are essential in both preventing and addressing homelessness, fostering social inclusion, and promoting sustainable development. In Hungary, housing poverty remains a particularly severe issue (Mistetics 2017; UN 2019).

of homelessness. How do structural and institutional factors shape the effectiveness of homelessness policies across different socio-political contexts? This central research question guides the analysis, aiming to uncover the ways in which various governance models, policy approaches, and institutional structures influence both short-term interventions and long-term solutions. The study aims to map the complex, multidimensional relationships between social exclusion and the housing crisis, shedding light on the potential for developing integrated, sustainable social policy strategies. These strategies are not solely focused on managing homelessness and alleviating crises but also prioritize prevention and the promotion of long-term social reintegration.

Homelessness as a Structural Challenge

Homelessness is widely recognized as one of the most pressing social policy challenges in both modern and developing societies (Shinn 2007; Allard & Small 2013; Henwood et al. 2015; Padgett et al. 2016; Pleace 2016; Olsen & Benjaminsen 2019). As the world grapples with an escalating housing crisis, it is crucial for governmental bodies and institutional systems to intensify their efforts in addressing the root causes of inadequate and unaffordable housing (Horsell 2013; Dubois & Nivakoski 2023; OECD 2024). Studies by Olsen and Benjaminsen (2019), as well as O'Flaherty (2019), emphasize that homelessness is not merely an economic issue but is intrinsically linked to various social factors that play a critical role in the expansion of the homeless population. Their analyses highlight that dimensions of social exclusion—such as geographical region, level of education, gender identity, ethnicity, unemployment, age, and sexual orientation—can significantly influence the risk of homelessness (Allard & Small 2013; Blaskó 2020; Győri 2022).

These factors do not operate in isolation; rather, they interact in a complex and interconnected manner, perpetuating structural exclusion and reinforcing the cycle of homelessness.[6] Authors of key studies on the prevention and management of homelessness consistently stress that addressing this multifaceted social issue requires comprehensive social policy strategies. Such strategies must synergistically target various forms of marginalization and discrimination to create sustainable solutions (Allard & Small 2013; O'Flaherty 2019). Benjaminsen and Andrade (2015) highlight that socially excluded groups are disproportionately represented among those experiencing housing insecurity, which can be interpreted as one of the most evident symptoms of deficiencies within social structures and systems. This suggests that homelessness cannot be reduced solely to the question of individual responsibility but should rather be under-

6 These forms of exclusion often accumulate, leading to severe social marginalization and further increasing the vulnerability of those affected.

stood as a manifestation of deep-rooted dysfunctions within the social and economic system. These systemic issues necessitate urgent and targeted structural and social policy interventions to ensure lasting and sustainable improvements.[7] Studies by Bakos (n.d.), Mistetics (2017), and Győri (2021, 2022) emphasize that the housing crisis is one of the key factors contributing to the persistence of homelessness. The authors further emphasize that the comprehensive implementation of programs such as Igloo Europe, Equal, Working Future, and the It's Your Move project serves as a clear example of how integrated housing and employment initiatives can facilitate the long-term social reintegration of homeless individuals (Bakos n.d.). Structural and institutional factors, as well as the application of best practices, play a crucial role in effectively addressing homelessness.[8] These programs focus on individualized support, increasing employment opportunities, improving access to healthcare and social services, and enhancing the autonomy of affected individuals[9] (such as the Rock Trust[10]). Such measures and services not only aim to directly address homelessness but also contribute to its long-term prevention and the promotion of social integration and reintegration.

Factors Affecting Measurement and Comparability of Results

According to the United Nations (UN) definition, homelessness can be classified into two primary categories: absolute homelessness and relative homelessness. Based on the UN's accepted definition, absolute homelessness includes individuals who live directly on the streets, in public spaces, or in abandoned buildings, with no formal access to housing. Relative homelessness, on the other hand, is a broader concept that includes individuals who lack permanent, safe, and adequate housing. This category encompasses those

7 The integration of housing and employment elements is essential for the effective, long-term management of homelessness and the promotion of social mobility. The coordinated implementation of these programs not only enhances individual living conditions but also plays a pivotal role in reducing structural barriers. Such comprehensive approaches foster sustainable social inclusion while mitigating social inequalities and ensuring the long-term support of marginalized groups.

8 Innovative solutions include the development of housing projects in mixed environments that reduce the formation of segregation (Padgett et al. 2014), the recovery-based "Housing First" approach (Bakos 2011; Dubois & Nivakoski 2023), and the British Housing Association, which prioritizes the provision of stable housing while actively supporting social reintegration (Tsemberis 2010; Varsányi 2013; Padgett et al. 2014).

9 Bakos' (2011) study highlights the complex, multidimensional nature of integration practices, emphasizing that the coordinated and simultaneous provision of housing, employment, and healthcare creates the most favorable conditions for successful social reintegration. The author stresses that the parallel development of these factors generates a synergistic effect, which not only addresses individual issues but also offers a comprehensive and integrated solution framework, significantly enhancing the chances and sustainability of social reintegration.

10 [https://www.rocktrust.org/; last accessed 17.11.2024]

without legal housing entitlement, individuals residing in temporary accommodations, as well as those staying with friends or family, facing the constant risk of losing their current housing situation at any time (United Nations 2000).[11] The varied interpretations of homelessness, its dynamic nature, and flexible characteristics, coupled with the lack of a universally accepted governmental definition, pose significant measurement challenges and methodological difficulties (Edgar et al., 2003; Culhane et al., 2011). This issue persists despite the European Federation of National Organisations Working with the Homeless (FEANTSA) having developed and introduced the European Typology on Homelessness and Housing Exclusion (ETHOS) in 2005, aiming to comprehensively define the various dimensions and forms of homelessness and housing exclusion.

Olsen and Benjaminsen (2019), along with O'Flaherty (2019), highlight that the interpretation and classification of homelessness vary across countries based on the 13 housing crisis categories defined by ETHOS, thereby further complicating international comparability. These discrepancies are evident not only in the identification of different types of homelessness but also in measurement methodologies and policy responses. While some countries adopt the broader ETHOS framework, including those living in precarious housing conditions or facing severe overcrowding, others define homelessness more narrowly, considering only individuals living on the streets or in emergency shelters as homeless (see Edgar & Meert 2006: 58–68; Győri 2020: 339–340). The variability in national approaches and differences in data collection and interpretation continue to hinder a comprehensive and coordinated response to homelessness.[12] Another factor distorting the data is that in most countries, data collection and surveys are primarily focused on individuals utilizing services, mapping only those who fall into the absolute homelessness category.[13] In North America, for instance, statistical data typically include only those staying in emergency shelters, while often excluding individuals who are forced to rely on alternative housing arrangements (Edgar et al. 2003; O'Flaherty 2019; Sousa et al. 2023). The measurement and management of homelessness are not only social but also highly political issues. As a result, in many cases, national governments—seeking to maintain a more favorable political image—manipulate macro-level statistics presented to the public and adopt narrower definitions of homelessness, thereby distorting the actual scope of the issue (Győri 2021; Olsen & Benjaminsen 2019).

11 [https://digitallibrary.un.org/record/623546?v=pdf ; last accessed 01.12.2024.]

12 Confirming the earlier findings of Edgar and Meert (2006), the lack of convergence poses a significant challenge in international comparative research. The absence of unified definitions and standardized measurement criteria hinders the comprehensive understanding of homelessness and its effective management on the international stage.

13 National research typically relies on centralized datasets. For instance, in Canada, measurements are primarily based on statistical data from homeless shelters, whereas in the United States, data collection is largely derived from decennial census updates.

A Possible Dimension for Standardizing Measurability and Comparability

The ETHOS[14] typology, developed by FEANTSA, could serve as a fundamental tool in addressing the methodological challenges of defining, measuring, and comparing homelessness on an international scale.[15] The ETHOS model categorizes homelessness using a multidimensional approach, considering three main dimensions: legal, physical, and social (see Figure 1). The physical dimension refers to the presence of safe and stable housing, the social dimension pertains to the ability to maintain social relationships, and the legal dimension encompasses the security of tenure. According to this typology, a dwelling qualifies as a home only if it meets all three criteria. Additionally, the general model identifies seven subcategories that cover different forms of housing exclusion and homelessness (see Table 1).

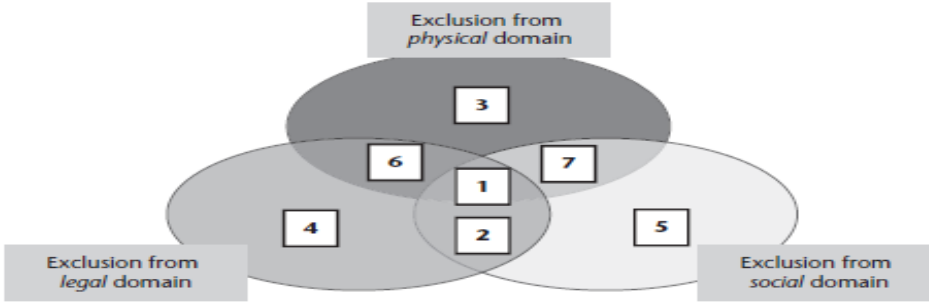


Figure 1. The domains of homelessness/housing exclusion (ETHOS). Source: Olsen & Benjaminsen 2019: 396

Notes:
1 Rooflessness.
2 Houselessness.
3 Inadequate housing (secure tenure).
4 Insecure housing (adequate housing).
5 Social isolation within a secure and adequate context.
6 Insecure and inadequate housing.
7 Inadequate housing and social isolation within a legally occupied dwelling.

14 "The term *ethos* originates from Greek and means moral perception, belief, concept, or character. In a broader sense, it refers to an ethical attitude or action that reflects a commitment to the practical implementation of values" (Cambridge Dictionary 2024; Catholic Encyclopedia 2024; Arcanum 2024).

15 [https://www.arcanum.com/hu/online-kiadvanyok/Lexikonok-a-pallas-nagy-lexikona-2/e-e-7C62/etosz-8DF3/ https://dictionary.cambridge.org/dictionary/learner-english/ethos] [https://lexikon.katolikus.hu/E/%C3%A9thosz.html ; last accessed 19.11.2024.]

Absolute homeless individuals face disadvantages in all three dimensions, whereas those living in temporary shelters generally have access to physical housing, yet their legal and social situations remain uncertain. The ETHOS framework offers a comprehensive classification that includes individuals living in inadequate conditions and those relying on temporary housing arrangements (see Table 1), facilitating a more nuanced analysis of the various forms and dimensions of relative homelessness (Edgar et al. 2003; Bakos & Győri 2006 in: FEANTSA 2007: 24).

Conceptual category	*Physical domain*	*Legal domain*	*Social domain*	*Operational definitions*
1. Rooflessness	no dwelling (roof)	no legal entitlement to space for exclusive possessions	no private and safe personal space for social relations	• *"living rough" (on the streets)* • *staying in overnight shelters or emergency accommodation*
2. Houselessness	has a place to live, fit for habitation	no legal entitlement to space for exclusive possessions	no private and safe personal space for social relations	• *living in homeless shelters, hostels, refuges, and other temporary accommodation* • *due for release from institution/ residential care centers (penal, medical, children's)*
3. Inadequate housing (with secure tenure)	dwelling unfit for habitation	has legal title and/or security of tenure	has space for social relations	•*living in tents; makeshift shelters, shacks, or shanties; overcrowded housing; or other dwellings not intended for human residence or deemed unfit by legislation or building regulations*
4. Insecure housing (with adequate housing)	has a place to live	no security of tenure	has space for social relations	• *temporarily living with family/friends* • *living with no legal tenancy or subtenancy* • *illegally occupying land* • *eviction or repossession orders underway*
5. Social isolation (with secure and adequate housing)	has a place to live	has legal title and/or security of tenure	no private and safe personal space for social relations	• *living in overcrowded conditions*
6. Insecure and inadequate housing	dwelling unfit for habitation	no security of tenure	has space for social relations	• *unlawfully occupying shelters unfit for human habitation (e.g., barns, sheds)*
7. Inadequate housing and social isolation (in a legally secure context)	dwelling unfit for habitation	has legal title and/or security of tenure	no private and safe personal space for social relations	• *families doubling up in inadequate dwellings*

Table 1. Conceptualizing and Operationalizing Homelessness and Housing Exclusion (ETHOS).[16] Source: Olsen & Benjaminsen 2019: 395

16 Based on the ETHOS category table and statistical data from 2020–2022, it is evident that a significant portion of Hungary's population lives in inadequate housing conditions.

Olsen and Benjaminsen (2019) emphasize that exclusion from a specific area can also result in extreme living conditions comparable to the daily experiences of homeless and roofless individuals. The general governmental adoption and widespread application of the ETHOS typology would not only be crucial for comparative research but would also provide a comprehensive framework for understanding and addressing the complexity of homelessness (Edgar et al. 2003). The standardization and general acceptance of statistical databases, measurement methods, and the ETHOS framework could facilitate the development and adaptation of more effective social policy strategies, enhancing the efficiency of interventions while enabling more targeted and differentiated responses to the various dimensions of homelessness (Benjaminsen & Dyb 2008; Dyb et al. 2021).

Currently, social policy measures aimed at addressing homelessness often fail to provide sustainable and effective long-term solutions, as government interventions primarily function as "crisis management" rather than preventive or restorative measures[17] (O'Flaherty 2019; World Habitat 2023[18]). In many countries, social policy measures focus on individual responsibility, undervaluing and overlooking the structural factors that contribute to the emergence and persistence of various forms of homelessness, while frequently restricting the operational scope of civil society organizations and other non-governmental organizations (e.g., NGOs; Mikula 2024: 132).[19] These eco-

According to Habitat, 20% of the Hungarian population (1.9 million people) reside in housing that does not meet basic housing standards, such as leaking roofs, mold-infested walls, lack of heating, or the absence of a bathroom or toilet. The data further indicate that 1.6 million people (16.76%) live in overcrowded environments, while housing insecurity affects 432,000 individuals (4.5%). According to 2022 figures, the number of children in temporary children's homes and foster care reached 22,236, while 86,586 individuals resided in mass shelters (Ámon 2023; https://habitat.hu/sites/lakhatasi-jelentes-2023/megfizethetoseg/ ; last accessed 05.02.2025.)

17 In contrast to crisis management-based models, there are well-functioning, politically supported programs and initiatives aimed at social reintegration and the reduction or elimination of homelessness. One such example is the 2012 expansion of Scotland's housing program, which granted a fundamental legal entitlement to housing for all residents of Scotland, applying a broader interpretation of homelessness (Edgar & Meert 2006: 49; Misetics 2017: 25; OECD 2024: 24; Scottish Federation of Housing Association 2024 [https://www.sfha.co.uk/]; last accessed 20.11.2024.)

18 [http://www.budapestinstitute.eu/uploads/wh_housing-led-in-cee_BRIEFING-HUNGARY_HU_FINAL.pdf; last accessed 02.01.2025.]

19 This approach is particularly prevalent in countries where the neoliberal economic model dominates, reinforcing individual responsibility as a core principle. The expansion of neoliberalism further exacerbates social inequalities, as the prioritization of competitiveness and privatization leads to the erosion of public services, particularly in education, social welfare, and healthcare systems. (Fitzpatrick & Powell 2019: 6)

nomic policy trends often exert a significant impact even at the micro level, amplifying neoliberal and individualistic social norms and values.[20] As neoliberalism continues to exert an increasing influence on global economic policy processes, society as a whole is shifting toward a stronger emphasis on individual responsibility. This transition may erode social solidarity, decrease the number of professionals entering the social work sector, and undermine the field's collective, structural perspective.[21] This process may significantly reduce professional commitment to social justice and equality while also diminishing students' willingness to take on traditional helping roles—a trend that has already been highlighted in numerous studies over the past years (Aviram & Katan 1991; McCartan et al. 2020; Wilson & McCrystal 2007; Petersén 2024; Mikula 2024a).

The Complexity of Social, Health, and Social Policy Challenges in the Context of Homelessness

For individuals experiencing homelessness or struggling with housing insecurity, employment is not merely a first step toward financial independence but also significantly contributes to various aspects of their lives, particularly in maintaining mental health and fostering social integration (FEANTSA 2007). Despite this, homeless individuals are among those most excluded from the labor market, even though employment plays a key role in building social relationships, expanding practical experience, developing skills, and strengthening self-esteem.

In their study, Boróka Fehér and Ivetta Kovács (2016), referring to the work of Fruzsina Albert and Beáta Dávid (2001), highlight the personality-shaping role of social relationships and communal lifestyles, which are often absent in the lives of homeless individuals. The authors emphasize that basic social support networks, such as family and close companions, not only provide emotional support but also foster psychosocial development, promoting social integration and individual well-being. According to estimates by the Abbé Pierre Foundation[22] (2023), approximately 895,000 people in

20 "According to the traditional view, homeless individuals end up on the streets as a result of their own decisions; therefore, it is primarily the role of those around them to point out that what they have done or are doing is wrong" (Gurály 2021: 202).

21 In his study on students' attitudes toward poverty, Negron-Velazquez (2016) identified significant regional variations in the perception of poverty's causes. His findings suggest that Mexican and Ecuadorian students, aligning with the majority societal perspective, tend to emphasize individual responsibility and personal explanations, whereas Chilean and Argentine students predominantly attribute poverty to structural factors.

22 [https://www.feantsa.org/public/user/Resources/reports/2023/OVERVIEW/Rapport_EN.pdf ; last accessed 23.11.2024.]

Europe are effectively homeless, while millions more face inadequate housing conditions.[23] These conditions include overcrowding, pollution, health hazards (such as mold), and life-threatening situations caused by structurally unstable and fire-prone housing. According to World Habitat estimates, approximately 30,000 people in Hungary are homeless, while 3.2% of the population (around 300,000 people) live in insecure housing conditions, and 15.5% reside in unacceptable or severely inadequate housing conditions (Mistetics 2017: 4).[24] The Transformation Institute (2017) and the OECD (2024: 20) highlight that while Hungary faces significant challenges in homelessness and housing, it remains one of the few OECD countries without a comprehensive, well-funded national housing and homelessness strategy supported by governmental approval or policy initiatives.[25] The sector suffers from significant underfunding (Mistetics 2017: 41), with most existing services focusing on managing temporary crisis situations, while long-term solutions remain consistently neglected (World Habitat 2023[26]). Ensuring the basic needs of homeless individuals and those facing housing insecurity—such as maintaining social relationships, accessing employment and healthcare, and receiving mental health support[27]—is often overlooked in the design and implementation of social policy programs. However, these factors play a key role in the development of long-term, sustainable solutions, as they directly contribute to improving quality of life and increasing social reintegration prospects for affected groups (Bakos n.d.; Bakos 2007; Abbé Pierre Foundation 2023).

The health status of people experiencing homelessness or the worst housing conditions is systematically worse compared to the general population (Fadgyas-Freyler 2017: 121–217; National Health Care for the Homeless Council [NHCHC], 2011, 2019[28]), as these individuals are highly exposed to trauma (Gurály 2021: 204–205),

23 In his study, Bakos (n.d.), citing data from the FEANTSA-Observatory, estimates that the number of homeless individuals in Europe is approximately 3 million, while around 15 million people live in inadequate housing conditions.

24 "Homelessness in Hungary today is a problem that has affected at least one in every 200 people at some point in their lives" (Gurály n.d.: 8).

25 Despite the fact that over the past three decades, several strategic plans have been developed—such as the works of Győri and Marothy (2008), Győri (2015), and Hegedüs et al. (2015)—aimed at the social reintegration of homeless individuals, the problem still persists.

26 http://www.budapestinstitute.eu/uploads/wh_housing-led-in-cee_BRIEFING-HUNGARY_HU_FINAL.pdf ; last accessed 02.01.2025.

27 According to Judit Popovics, a clinical psychologist, nearly 90% of homeless individuals struggle with some form of mental health or psychological disorder (Takács 2024: https://wmn.hu/ugy/63240-a-hajlektalansag-kez-a-kezben-jar-a-psziches-zavarokkal ; last accessed 07.12.2024.).

28 https://nhchc.org/wp-content/uploads/2019/08/Hln_health_factsheet_Jan10-1.pdf ; https://nhchc.org/wp-content/uploads/2019/08/homelessness-and-health.pdf_; last accessed 07.01.2025.

diseases, mental health disorders, substance use disorders,[29] infections, and other serious health risks (OECD 2024: 98).[30] The cumulative nature of health issues among homeless individuals is particularly alarming (Pleace 2016), as they frequently lack timely access to basic medical care, screening programs, and mental health services (NHCHC 2011, 2019).

Limited access to healthcare severely deteriorates the psychosocial and physical well-being of homeless individuals, significantly hindering improvements in their quality of life and life prospects (Bakos n.d.; Bakos 2006; NHCHC 2011, 2019; Fadgyas-Freyler 2017; Mózer 2017: 232; OECD 2024: 99). These challenges not only are critical at the individual level but also place considerable strain on financial, public health, and social policy systems. The lack of adequate access to healthcare deepens existing social inequalities, making it more difficult to develop effective public policies and preventive strategies. Addressing these systemic challenges requires complex intervention mechanisms that simultaneously respond to individual needs as well as broader social and public health consequences.

Potential Instruments for Social Policy Interventions

Rather than adopting extreme policy positions, moderate and inclusive social policy interventions can serve as effective tools for addressing and mitigating the multidimensional challenges of homelessness and the housing crisis (Allard & Small 2013; Dubois & Nivakoski 2023). These interventions should primarily focus on national strategies formulated by governments, aiming to establish clear guidelines, achieve measurable outcomes and implement integrated measures.[31] A key element of the inclusive approach is the development and execution of social policy strategies based on multi-stakeholder cooperation, as this is essential for achieving effective and sustainable results. Therefore, cross-sectoral collaboration is indispensable, involving government

29 In his study compiling summary data, Péter Győri (2022) highlights that the health status of homeless individuals living in Budapest is exceptionally poor**,** with a particularly high proportion of homeless individuals under the age of 40 suffering from psychiatric disorders.

30 World Habitat (2023, http://www.budapestinstitute.eu/uploads/wh_housing-led-in-cee_BRIEFING-HUNGARY_HU_FINAL.pdf ; last accessed 02.01.2025.) and Raoult et al. (2001) emphasized in their studies that overcrowded shelters, which often serve as the only available refuge, create favorable conditions for the spread of infectious diseases and epidemics, thereby exacerbating public health risks.

31 National strategies typically place a strong emphasis on preventive measures, the implementation of low-threshold services—such as the Housing First approach—and the development of integrated support systems, as these elements are fundamental to the prevention and effective management of homelessness (Culhane et al. 2011).

actors, civil society organizations, faith-based institutions, researchers, and affected communities, particularly those with lived experience of homelessness or housing insecurity (Pleace 2016).[32] The involvement of governmental bodies, stakeholders, and individuals experiencing homelessness plays a pivotal role in grounding intervention strategies in practical realities. Gille et al. (2024) emphasize that considering the lived experiences of homeless individuals not only facilitates the identification and effective resolution of housing barriers but also helps reduce discrimination. Moreover, engaging affected individuals serves as a key tool for strengthening social inclusion and empowering self-determination, enabling them to regain control over decisions affecting their lives.

Legal anti-segregation approaches and anti-discrimination measures, similar to those implemented in Scottish and Portuguese legislation, play a key role in ensuring the fundamental rights of individuals facing housing crises and homelessness.[33] These measures facilitate access to stable housing, employment opportunities, and essential services, thereby promoting social inclusion and reducing systemic inequalities. Innovative and evidence-based programs, such as initiatives ensuring hygiene as a human right (Meehan et al. 2022), municipal regulations in France and the UK guaranteeing the right to permanent housing (Mistetics 2017), the UK's "ProxyAddress" program providing temporary virtual addresses, and Australia's free "Postbox" service, significantly contribute to the promotion of social justice while effectively eliminating administrative barriers. Such innovative initiatives facilitate employment opportunities, access to healthcare, and social benefits, while also demonstrating the effectiveness of inclusive policy measures in improving service accessibility and promoting social reintegration (OECD 2024: 29).

Conclusions

Governments frequently interpret or manipulate homelessness statistics for political purposes, often overstating individual responsibility.[34] However, the primary causes of rising homelessness frequently stem from deficiencies in social and economic struc-

32 The active involvement of affected individuals is crucial to ensuring that interventions appropriately and effectively address real needs and challenges.

33 Portugal's national strategy places the fundamental rights of homeless individuals at its core, ensuring a minimum level of housing and social support (OECD 2024). Similarly, Scottish legislation no longer criminalizes homeless people living in public spaces. Instead, the government guarantees the right to stable housing for all homeless individuals, marking a significant step towards the realization of an inclusive society (Scotland Act 2003; 2012; 2020; 2022, https://www.gov.scot/policies/homelessness/; last accessed 14.12.2024.).

34 This type of extreme approach not only distorts public perception but also narrows policymakers' perspectives, significantly hindering the effective management of the issue.

tures rather than individual choices.[35] Inclusive social policy interventions should aim not only to manage homelessness but also to eliminate its structural causes (Allard & Small 2013).[36] Dubois and Nivakoski (2023) and the OECD (2024) emphasize that long-term, coordinated strategies are essential for sustainably reducing homelessness and ensuring the protection of the fundamental rights of those affected.[37] The existing social problem cannot be effectively addressed by government policies that focus on criminalizing homelessness.[38] Repressive approaches negatively affect the social perception of homelessness and public debates on homelessness, while creating significant barriers to social inclusion. Effectively tackling homelessness and the housing crisis requires taking into account the structural factors and economic disparities between regions that contribute to the exacerbation of these problems in social, economic, and political processes. The effective management of homelessness and the housing crisis is only possible if social, economic, and political processes take into account the structural factors and regional economic inequalities that exacerbate these issues. These factors include, among others, the lack of well-paying jobs, gentrification, the deregulation of the housing market, and the continuous defunding of community services and public financing (Shinn & Weitzman 1996; World Habitat 2023: 3).[39] To ensure the long-term sustainability of best practices, governments must move beyond narrow-sighted approaches and use economic, political, and legal tools to tackle structural challenges. To achieve sustainable solutions, it is crucial to address the shortage of affordable housing and improve housing conditions, ensure legal security of tenure, and actively engage key stakeholders, including municipalities, NGOs, faith-

35 Accurate and standardized data collection and monitoring play a fundamental role in addressing homelessness, as they enable the evaluation of strategy effectiveness, the tracking of progress, and the ensuring of accountability**.** The Monitoring "*FrameWork"* system implemented in the United Kingdom serves as a strong example of how data analysis can support results-oriented decision-making and the development of long-term strategies **(**OECD 2024).

36 The central element of education, healthcare, and social system reforms is to prioritize social justice and equity**,** as opposed to the market-driven approaches promoted by neoliberalism (Fitzpatrick & Powell 2019).

37 To reduce social exclusion, it is essential to articulate and implement critical pedagogical approaches that not only emphasize individual responsibility but also address systemic inequalities (Fitzpatrick & Powell 2019).

38 Since 2010, Hungarian government policy has increasingly prioritized the criminalization of homelessness. Consequently, the Fundamental Law now classifies the habitual residence of homeless individuals in public spaces as a punishable act (Mistetics 2013 in: World Habitat 2023: 2. http://www.budapestinstitute.eu/uploads/wh_housing-led-in-cee_BRIEFING-HUNGARY_HU_FINAL.pdf ; last accessed 02.01.2025.).

39 In regions where rising housing prices continuously displace low-income groups, the social divide deepens, while the risk of homelessness significantly increases among marginalized and disadvantaged populations**.**

based organizations, and civil society actors. Furthermore, strengthening integrated support services and preventive programs, as well as taking a firm stand against discrimination, are essential measures in effectively addressing housing insecurity and homelessness (World Habitat 2023[40]).

This study provides a comprehensive and in-depth analysis of homelessness, detailing the challenges faced by social policy interventions aimed at preventing and addressing the issue. It emphasizes that homelessness is not merely an individual social problem but a structural consequence of the dysfunctions and inadequacies of modern economic and social systems. Therefore, addressing homelessness effectively requires a holistic, interdisciplinary approach. If a common consensus could be reached, the international adoption of the ETHOS model could serve as a promising tool for comparing the various forms and dimensions of homelessness globally. However, the analysis underscores that the effectiveness of social policy programs can only be enhanced if governments are able to accurately identify and address the structural political, social, and economic dysfunctions that fundamentally contribute to the rise of homelessness and impede efforts to combat it effectively.

Literature

Albert, Fruzsina & Dávid, Beéta 2001. *Ha elszakad a háló… A hajléktalanság kapcsolathálózati megközelítésben.* Budapest, Új Mandátum Kiadó.

Allard, W. Scott & Small, L. Mario 2013. Reconsidering the urban disadvantaged: The role of systems, institutions, and organizations. *The Annals of the American Academy of Political and Social Science, 647*(1), 6-20. (https://doi.org/10.1177/0002716213479317)

Alvarez, Thyra A. & Steefen, Barry L. 2023. *Worst case housing need: 2023 Report to Congress. U.S. Department of Housing and Urban Development Office of Policy Development and Research.*Wasington, U.S. Department of Housing and Urban Development. (https://www.huduser.gov/portal/publications/Worst-Case-Housing-Needs-2023.html; last accessed 10.12.2024.)

Aviram, Uri & Katan, Joseph 1991. Professional preferences of social workers: prestige scales of populations, services, and methods in social work. *International Social Work, 34*(1), 37–55. (https://doi.org/10.1177/002087289103400104)

Bakos, Péter (n.d.). Hajléktalan emberek társadalmi integrációját célzó gyakorlatok az Európai Unióban. *Ifjúsági, Családügyi, Szociális és Esélyegyenlőségi Minisztérium.* (https://www.refomix.hu/media/hazai-tanulmanyok-kutatasi-beszamolok; last accessed 08.12.2024.)

40 http://www.budapestinstitute.eu/uploads/wh_housing-led-in-cee_BRIEFING-HUNGARY_HU_FINAL.pdf ; last accessed 02.01.2025.

FEANTSA 2007. *Multiple barriers, multiple solutions: Inclusion into and through employment for people who are homeless in Europe.* Brussels, European Federation of National Organisations working with the Homeless. (https://www.feantsa.org/en/report/2012/04/26/employment-2007?bcParent=27; last accessed 08.12.2024.)

Bakos Péter 2006. *Az Egészséghez való emberi jog: Az egészség biztosítása a hajléktalan emberek számára Magyarországon*. FEANTSA. (https://www.refomix.hu/tanulmanyok-kutatasi-beszamolok.html; last accessed 03.01.2025.)

Bakos, Péter 2011. Lakhatás, mindenekelőtt. *Esély*, 22(3), 106–112. (https://www.esely.org/kiadvanyok/2011_3/06bakos.indd.pdf; last accessed 11.01.2025.)

Bakos, Péter & Győri, Péter 2006. A hajléktalanság és a lakhatásból való kirekesztettség Európai tipológiája. In: Bakos, Péter (ed.): *Összetett problémák, összetett megoldások: A hajléktalan emberek integrációja a foglalkoztatás által Magyarországon.* FEANTSA. (https://www.feantsa.org/download/hungary_empl_report_2007_hu62164099873 4557215.pdf; last accessed 10.12.2024.)

Blaskó, Zsófia 2020. Magyarországon csökken a hajléktalanok száma, ám egyre nehezebbek a körülményeik. *Mérce.* (https://merce.hu/2020/10/24/magyarorszagon-csokken-a-hajlektalanok-szama-am-egyre-nehezebbek-a-korulmenyeik/; last accessed 11.01.2025.)

Culhane, D. P., Metraux, S., & Byrne, T. 2011. A prevention-centered approach to homelessness assistance: A paradigm shift? *Housing Policy Debate, 21*(2), 295–315. (https://doi.org/10.1080/10511482.2010.536246)

Dubois, Hans & Nivakoski, Sanna 2023. *Unaffordable and inadequate housing in Europe: Living conditions and quality of life*. Luxembourg, Eurofound, Publications Office of the European Union.

Dyb, Evelin., Benjaminsen, Lars., Knutagard, Marcus & Lindén, Jarmo 2021. Governing through definitions and numbers: Analysis of the nordic homeless registrations as instruments of governing homelessness. *European Journal of Homelessness,*15 (3), 143–157. (https://oda.oslomet.no/oda-xmlui/handle/11250/2987241; last accessed 09. 12.2024.)

Edgar, Bill., Doherty, Joe & Meert, Henk 2003. *Review of Statistics on Homeless in Europe.* European Observatory on Homelessness, FEANTSA. (https://docslib.org/doc/4752983/2003review-of-statistics-on-homelessness-in-europe?; last accessed 01.12.2024.)

Edgar, Bill & Meert, Henk 2006. *Fifth Review of Statistics on Homeless in Europe.* European Observatory on Homelessness, FEANTSA. (https://www.feantsaresearch.org/download/5-20064496180119292404 09.pdf; last accessed 07.12.2024.)

Fadgyas-Freyler, Petra 2017. A hajléktalan emberek általános jellemzői és egészségi állapotuk egy adminisztratív adatbázis alapján. *Esély*, 28(3), 102–122. (https://www.esely.org/kiadvanyok/2017_3/esely_2017-3_3-2_fadgyas-freyer_hajlektalan_emberek.pdf ; last accessed 25.11.2024.)

Fehér, Boróka & Kovács, Ivetta 2016. Különbségek és hasonlóságok. Hajléktalan nők és férfiak összehasonlító vizsgálatában. In Breitner, Péter - Gurály, Zoltán - Győri, Péter - Mózer, Péter - Szabó, Andrea (eds.): *Húsz év után: A február harmadika Országos Hajléktalan Adatfelvétel Elemzései.* 2021. Menhely Alapítvány, 134–166. (https://drive.google.com/file/d/1c6pFV0mV7H4ua20evKqgfQFQymZ39aq5/view; last accessed 11.12.2024.)

Fitzpatrick, Kate. & Powell, Darren 2019. Critical pedagogy and neoliberalism. *Movimento, Porto Alegre* (25), 1–12. (https://doi.org/10.22456/1982-8918.96638)

Gille, Christoph-,Liesendahl, Arnd - Müller, Michael - Rieben, Anne van 2024. Zugang Verweigert Barrieren und Diskriminierung wohnungsloser Menschen am Wohnungmarkt. *Hochschule Düsseldorf University of Applied Sciences.* (https://doi.org/10.20385/OPUS4-4330)

Gurály, Zoltán (é. n). Padlón. Beszélgetés a hajléktalan emberek körében végzett adatgyűjtésről. In: Breitner, Péter - Gurály, Zoltán - Győri, Péter - Mózer, Péter - Szabó, Andrea (szerk.): *Húsz év után: A február harmadika Országos Hajléktalan Adatfelvétel Elemzései.* 2021. Menhely Alapítvány, 6–11. (https://drive.google.com/file/d/1c6pFV0mV7H4ua20evKqgfQFQymZ39aq5/view; last accessed 11.12.2024.)

Gurály, Zoltán 2021. Tanult tehetetlenség a magyarországi hajléktalan emberek körében. In: Breitner, Péter - Gurály, Zoltán - Győri, Péter - Mózer, Péter - Szabó, Andrea (ed.): *Húsz év után: A február harmadika Országos Hajléktalan Adatfelvétel Elemzései.* 2021. Menhely Alapítvány. 201–227. (https://drive.google.com/file/d/1c6pFV0mV7H4ua20evKqgfQFQymZ39aq5/view; last accessed 11.12.2024.)

Győri, Péter & Maróthy, Márta 2008. *Merre tovább? Egy nemzeti hajléktalanügyi stratégia lehetséges keretei. Szakértői javaslat a Magyar Köztársaság Kormánya részére.* Pro Domo Füzetek I. Budapest. Hajléktalanokért Közalapítvány. (http://www.hajlektalanokert.hu/dokumentumok/tanulmanyok/MERRE_TOVABB_hajlektalanugyi_strategia.pdf; last accessed 01.12.2024.)

Győri, Péter 2015. *Hajléktalanügyi teendők 2015.Utcától lakásig. Javaslatok a hajléktalan emberek ellátásának átalakítására.* FogLak projekt2. Hajléktalanokért Közalapítvány. (https://www.hajlekot.hu/dokumentumok/hut/hut4.0.pdf; last accessed 01.12.2024.)

Győri, Péter 2020. Idősorok a hazai hajléktalanságról. In: Kolosi, Tamás - Szelényi, Iván - Tóth, István György (eds.): *Társadalmi Riport*. Budapest, TÁRKI. 332–357. (https://tarki.hu/tarsadalmi-riport; last accessed 21.11.2024.)

Győri, Péter 2021. ,,Így kallódunk el szépen egymás után." Állami gondozottak voltak, ma hajléktalanok. *Esély* 32(1), 92–111. [https://doi.org/10.48007/esely.2021.1.6]

Győri, Péter 2022. A hajléktalan helyzetben lévők demográfiai-szociológiai összetételének főbb változásai 2000-2020 között Budapesten. Adatok és rövid összefoglaló a Fővárosi Önkormányzat hajléktalanügyi koncepciójához. (https://www.gyoripeter.hu/; last accessed 12.12.2024.)

Henwood, F. Benjami - Wenzel, L. Suzanne - Mangano, F. Philip - Hombs, MaryEllen - Padgett, K. Deborah - Byrne, Thomas - Rice, Eric - Butts, C. Sarra & Uretsky, C. M. Mathew 2015. *The grand challenge of ending homelessness.* American Academy of Social Work & Social Welfare. (https://grandchallengesforsocialwork.org/wp-content/uploads/2015/12/WP9-with-cover.pdf; last accessed 29.03.2025.)

Horsell. Chris 2013. Homelessness, Social Policy and Difference. *Advances in Social Work & Welfare Education,* 15(2), 39–55. (https://journal.anzswwer.org/index.php/advances/article/view/10/7; last accessed 20.11.2024.)

Hegedüs, József - Horváth, Vera - Somogyi, Eszter & Teller Nóra 2015. *„Hajléktalan emberek társadalmi és munkaerő-piaci integrációját segítő programok" — TÁMOP 5.3.3 konstruk-*

ció monitoringja. Városkutatás Kft. (https://www.mri.hu/wp-content/uploads/2016/05/Tamop-533_monitoring-vegleges.pdf; last accessed 01.12.2024.)

Benjaminsen, Lars & Andrade, Stefan, Bastholm 2015. "Testing a Typology of Homelessness Across Welfare Regimes: Shelter Use in Denmark and the USA." *Housing Studies*, 30(6), 858–876. [https://doi.org/10.1080/02673037.2014.982517]

Benjaminsen, Lars & Dyb, Evelyn 2008. The effectiveness of homeless policies - variations among the Scandinavian Countries. *European Journal of Homelessness*, (2), 45–67. (https://pure.vive.dk/ws/files/252880/article_2.pdf?; last accessed 25.11.2024.)

McCartan, Claire - Byrne, Julie - Campbell, Jim - Coogan, Declan - Davidson, Gavin - Hayes, David - Kirwan, Gloria - MacDonald, Mandi - McCaughren, Simone - McFadden, Paula - McGregor, Caroline - Montgomery, Lorna - Pentaraki, Maria - Roddy, Shaun - Roulston, Audrey - Shore, Caroline & Wilson, Elaine 2020. Social work students on the island of Ireland: A cross-sectional survey. *Social Work Education, 1*(1), 228–247. (https://doi.org/10.1080/02615479.2020.1832060)

Meehan, Katie - Odetola, Marianne & Griswold, Alison 2022. *Homelessness, Water Insecurity, and the Human Rights to Water and Sanitation*. London. King's College London. (https://doi.org/10.18742/pub01-085)

Mikula, Zsolt 2024. The situation of social work in the semi-peripheral Hungarian reality. *Forum Social Sciences Review XXVI (5),* 121–136. (https://doi.org/10.61795/fssr.v26y2024i5.07)

Mikula, Zsolt 2024a. Social Value Changes and Social Work Education: Examining the Student Base and Career Orientation of Social Work and Related Undergraduate Programs in Light of Social Value Changes. *Metszetek, 13(3),* 98–112. (https://doi.org/10.18392/metsz/2024/3/5)

Misetics, Bálint 2013. The Criminalisation of Homelessness in Hungary. In: Jones, Samara (ed.): *Mean Streets. A Report on the Criminalisation of Homelessness in Europe.* Fondation Abbé Pierre, FEANTSA, Housing Rights Watch. (https://housingrightswatch.org/sites/default/files/8.%20Chapter%205.pdf; last accessed 20.12.2024.)

Mistetics, Bálint 2017. *Lakhatáshoz való jogot! A szociális lakáspolitika legsürgetőbb feladatairól*. Budapest. Átalakulási Intézet. (https://mmaa.hu/wp-content/uploads/2017/02/Lakhat%C3%A1st-mindenkinek-vitaanyag.pdf ; last accessed 06.12.2024.)

Mózer, Péter 2017. Kiszolgáltatottság és a szükségletek kérdése. In: Breitner, Péter - Gurály, Zoltán - Győri, Péter - Mózer, Péter - Szabó, Andrea (ed.): *Húsz év után: A február harmadika Országos Hajléktalan Adatfelvétel Elemzései.* 2021. Menhely Alapítvány, 228–254. (https://drive.google.com/file/d/1c6pFV0mV7H4ua20evKqgfQFQymZ39aq5/view ; last accessed 11.12.2024.)

Negron-Velazquez, Gisela 2016. Attitudes toward poverty among exit students of undergraduate social work programs in eight Latin American countries. *European Journal of Social Work,* 19 (3–4), 385–404. (http://dx.doi.org/10.1080/13691457.2016.1166423)

OECD 2024. *OECD Toolkit to Combat Homelessness.* Paris. (https://doi.org/10.1787/0fec780e-en)

O'Flaherty, Brendand 2019. Homelessness research: A guide for economists (and friends). *Journal of Housing Economics,* 44, 1–25. (https://doi.org/10.1016/j.jhe.2019.01.003)

Olsen, M. Gregg & Benjaminsen, Lars 2019. "Homelessness and Welfare States." In: Bent Greve (ed): *International Handbook of the Welfare State*. Oxfordshire, United Kingdom, Routledge, 393–406.

Padgett, K. Deborah - Henwood, F. Benjamin & Tsemberis, J. Sam 2014. *Housing First: Ending homelessness, transforming systems, and changing lives.* Oxford University Press. [https://doi.org/10.1093/acprof:oso/9780199989805.001.0001]

Petersén, Anna Charlotta 2024. New insights on motives for choosing social work as a career: Answers from students and newly qualified social workers. *Social Work Education, 43* (3), 702–716. (https://doi.org/10.1080/02615479.2022.2139823)

Pleace, Nicholas 2016. Researching homelessness in Europe: Theoretical perspectives. *European Journal of Homelessness, 10* (3), 19–44. (https://www.feantsa.org/download/10-3_article_11612162762319330292.pdf ; last accessed 06.12.2024.)

Raoult, Didier - Foucault, Cédric & Brouqui, Philippe 2001. Infections in the homeless. *The Lancet Infectious Diseases*, 1 (2), 77–84. (https://doi.org/10.1016/S1473-3099(01)00062-7)

Shinn, Marybeth 2007. International homelessness: Policy, socio-Cultural, and individual perspectives. Journal of social Issues 63(3), 657–677. (https://www.academia.edu/48776161/International_Homelessness_Policy_Socio_Cultural_and_Individual_Perspectives?utm_source ; last accessed 26.12.2024.)

Steefen, L. Barry - Carter, R. George - Martin, Marge - Pelletiere, Danilo - Vandenbroucke, A. David & Yao, Yunn-Gann, David 2015. *Worst case housing need: 2015 Report to Congress.* U.S. Department of Housing and Urban Development Office of Policy Development and Research. (https://www.huduser.gov/portal/Publications/pdf/WorstCaseNeeds_2015.pdf ; last accessed 20.11.2024.)

Sousa, de Tanya - Andrichik, Alyssa - Prestera, Ed - Rush, Katherine - Tano, Colette - Wheeler, Micaiah & Abt Associates 2023. *The 2023 Annual homelessness assessment report (AHAR) to Congress.* The U.S. Department of Housing and Urban Development. (https://www.huduser.gov/portal/sites/default/files/pdf/2023-ahar-part-1.Pdf ; last accessed 21.11.2024.)

Tsemberis, Sam 2010. *Housing First: The Pathways Model to End Homelessness for People with Mental Illness and Addiction*. Minneapolis, Hazelden Press.

Varsányi, Nóra 2013. Nyitás az utcára program bemutatása. In: Fehér, Boróka - Tatár, Babett & Vida, Judit (ed.): *Képzés - lakhatás - foglalkoztatás : integrációs programok hajléktalan élethelyzetben lévő emberek számára*, Budapest, BMSZKI, Menhely Alapítvány (2014), 67–82.

Wilson, George & McCrystal, Patric 2007. Motivations and career aspirations of MSW students in Northern Ireland. *Social Work Education, 26* (1), 35–52. (https://doi.org/10.1080/02615470601036534)

Online References

Abbé Pierre Alapítvány 2023. *Eight overview of housing exclusion in Europe.* FEANTSA. (https://www.feantsa.org/public/user/Resources/reports/2023/OVERVIEW/Rapport_EN.pdf ; last accessed 23.11.2024.)

Arcanum Online Lexikon 2024. *Ethos.* (https://www.arcanum.com/hu/online-kiadvanyok/Lexikonok-a-pallas-nagy-lexikona-2/e-e-7C62/etosz-8DF3/ ; last accessed 19.11.2024.)

Ámon, Katalin 2023. *Éves lakhatási jelentés 2023. Megfizethetőség.* (https://habitat.hu/sites/lakhatasi-jelentes-2023/megfizethetoseg/ ; last accessed 05.02.2025.)

Cambridge Dictionari 2024. *Ethos.* (https://dictionary.cambridge.org/dictionary/learner-english/ethos ; last accessed 19.02.2024.)

European Economic and Social Committee 2021. *Lisbon Declaration on the European Platform on Combatting Homelessness.* (https://ec.europa.eu/commission/presscorner/detail/en/ip_21_3044 ; last accessed 21.03.2025.)

Housing (Scotland) Act 2003, 2012, 2020, 2022. (https://www.gov.scot/policies/homelessness/ ; last accessed 14.12.2024.)

Katolikus Lexikon 2024. *Ethos.* (https://lexikon.katolikus.hu/E/%C3%A9thosz.html ; last accessed 19.11.2024.)

KSH 2022. *Népszámlálás 2022. A háztartások száma és összetétele.* (https://nepszamlalas2022.ksh.hu ; last accessed 15.01.2025)

National Health Care for the Homeless Council 2011. *Homelessness & health: What's the connection?* Nashville, Tennessee. (https://nhchc.org/wp-content/uploads/2019/08/Hln_health_factsheet_Jan10-1.pdf ; last accessed 07.01.2025.)

National Health Care for the Homeless Council 2019. *Homelessness & health: What's the connection?* Nashville, Tennessee. (https://nhchc.org/wp-content/uploads/2019/08/homelessness-and-health.pdf; last accessed 07.01.2025.)

Rock Trust 2024. *Our services.* (https://www.rocktrust.org/; last accessed 17.11.2024.)

Scottish Federation of Housing Association 2024. *Our work.* (https://www.sfha.co.uk/our-members/; last accessed 20.11.2024.)

Takács, Dalma 2024. A hajléktalanság kézben jár a pszichés zavarokkal. WMN, Élet-Kult-Ember (https://wmn.hu/ugy/63240-a-hajlektalansag-kez-a-kezben-jar-a-psziches-zavarokkal; last accessed 07.12.2024.)

United Nations 2019. *Affordable Housing and Social Protection Systems for All to Address Homelessness.* (https://www.un.org/development/desa/dspd/wp-content/uploads/sites/22/2019/10/ summary-egm-final-9sep.pdf; last accessed 07.01.2025.)

United Nations 2000. *Strategies to combat homelessness. United Nations Centre for Human Settlements — Habital.* (https://digitallibrary.un.org/record/623546?v=pdf; last accessed 01.12.2024.)

World Habital 2023. *A hajléktalanság felszámolása Közép-és Kelet-Európában: a lakhatás-vezérelt rendszerre való áttérés Magyarországon.* Leicester, United Kingdom. (http://www.budapestinstitute.eu/uploads/wh_housing-led-in-cee_BRIEFING-HUNGARY_HU_FINAL.pdf; last accessed 02.01.2025.)

Appendix

Table 2. ETHOS – European Typology on Homelessness and Housing Exclusion from FEANTSA

Conceptual Category		Operational Category		Living Situation		Generic Definition
ROOFLESS	1	People Living Rough	1.1	Public space or external space		Living in the streets or public spaces, without a shelter that can be defined as living quarters
	2	People in emergency accommodation	2.1	Night shelter		People with no usual place of residence who make use of overnight shelter, low threshold shelter
HOUSELESS	3	People in accommodation for the homeless	3.1 3.2 3.3	Homeless hostel Temporary Accommodation Transitional supported accommodation		Where the period of stay is intended to be short term
	4	People in Women's Shelter	4.1	Women's shelter accommodation		Women accommodated due to experience of domestic violence and where the period of stay is intended to be short term
	5	People in accommodation for immigrants	5.1 5.2	Temporary accommodation / reception centres Migrant workers accommodation		Immigrants in reception or short term accommodation due to their immigrant status
	6	People due to be released from institutions	6.1 6.2 6.3	Penal institutions Medical institutions[190] Children's institutions / homes		No housing available prior to release Stay longer than needed due to lack of housing No housing identified (e.g by 18th birthday)
	7	People receiving longer-term support (due to homelessness)	7.1 7.2	Residential care for older homeless people Supported accommodation (for formerly homeless people)		Long stay accommodation with care for formerly homeless people (normally more than one year)
INSECURE	8	People living in insecure accommodation	8.1	Temporarily with family/friends		Living in conventional housing but not the usual or place of residence due to lack of housing
			8.2	No legal (sub)tenancy		Occupation of dwelling with no legal tenancy; illegal occupation of a dwelling
			8.3	Illegal occupation of land		Occupation of land with no legal rights
	9	People living under threat of eviction	9.1 9.2	Legal orders enforced (rented) Re-possession orders (owned)		Where orders for eviction are operative Where mortgagor has legal order to re-possess
	10	People living under threat of violence	10.1	Police recorded incidents		Where police action is taken to ensure place of safety for victims of domestic violence
INADEQUATE	11	People living in temporary / non-conventional structures	11.1 11.2 11.3	Mobile homes Non-conventional building Temporary structure		Not intended as place of usual residence Makeshift shelter, shack or shanty Semi-permanent structure hut or cabin
	12	People living in unfit housing	12.1	Occupied dwellings unfit for habitation		Defined as unfit for habitation by national legislation or building regulations
	13	People living in extreme overcrowding	13.1	Highest national norm of overcrowding		Defined as exceeding national density standard for floor-space or useable rooms

Source: FENTSA 2007: 49.

Miklós Kontra

The Role of the Fórum Social Science Review (*Fórum Társadalomtudományi Szemle*) in Hungarian Linguistics*

1. A brief historical overview

I find it appropriate to begin my survey of the linguistic contributions of the 25 volumes published so far by the *Fórum Social Science Review* (ISSN 1335-4361) with a brief overview of the main features of Hungarian linguistics on this side of the border (in Slovakia) and beyond the border (in Hungary), starting from 1985. Hungarian sociolinguistic research took off in 1985 at the Research Centre for Linguistics of the Hungarian Academy of Sciences, within its Department of Sociolinguistics (MTA Nyelvtudományi Intézet, Élőnyelvi Osztály). In 1991, the volume *Studies on Bilingualism Outside Hungary* (Tanulmányok a határainkon túli kétnyelvűségről), edited by Kontra (1991), was published. It included István Lanstyák's 62-page essay on the status of the Hungarian language in Czechoslovakia between 1918 and 1991 (Lanstyák 1991). Four years later, in 1995, Lanstyák caused considerable alarm among some of the leading Hungarian linguists of the time by publishing his essay "The centres of the Hungarian language" (A magyar nyelv központjai) in *Magyar Tudomány*. That same year, we successfully applied to the Research Support Scheme in Prague to investigate Hungarian bilingualism across the Carpathian Basin (see Kontra 1999), and by 2000, the third volume in our book series appeared: Lanstyák's *The Hungarian Language in Slovakia* (A magyar nyelv Szlovákiában). The first issue of the *Review* had been published just the year before.

It is also worth bearing in mind that, until the end of the 20th century, Hungarian linguistics was restricted exclusively to descriptions of either the codified standard or dialects. Current Hungarian grammars sometimes disregard half of Hungary's adult population, or even more; by contrast, good contemporary accounts describe the language of roughly 12 million Hungarians across the Carpathian Basin (Kontra 2022a, 2022b).

* Edited version of a lecture presented at the conference *Tudomány magyar kisebbségi közegben* (*Science in the Hungarian Minority Context)* in the Fórum Institute, Šamorín on June 14, 2024.

2. A blink at the Review

The linguistic articles in the *Review* cover a refreshingly wide spectrum of topics. Compared with journals published in Hungary, the range of subjects these articles address is almost dazzling. To mention just a few topics and studies from the past decade at random: "Language ideologies and schoolscapes in Hungarian-medium schools beyond Hungary" (Petteri Laihonen, 2023/1); "Linguistic rights in education and public administration in the light of the reports of the committee of experts of the European Charter for Regional or Minority Languages" (István Csernicskó and Enikő Tóth-Orosz, 2021/1); "Speaking Hungarian in the courtroom: The use of Hungarian in the courts of the first Czechoslovak Republic" (Attila Simon, 2017/4); "The past, present (and future?) of the *ö*-dialect in Senec/Szenc" (Diana Kožík, 2006/3); "Philosophy and language – The language of philosophy: The linguistic views of two Reform-era Hungarian philosophers (János Erdélyi and Gusztáv Szontagh)" (Béla Mester 2020/3); "Bilingualism as a business interest" (Kornélia Hires-László, Gergely Horzsa, and László Letenyei, 2019/4); "Shifting first-name trends in Slovakia" (János Bauko, 2017/2); "Entrepreneurial bilingualism in Komárno/Komárom" (Géza Tokár, 2016/1); "Ideas about language and language-related issues in the daily *Új Szó* between 1949 and 1999" (Szilárd Sebők, 2015/4); "Standardization as a language-shaping activity" (István Lanstyák, 2015/2); and "Freedom and linguistic freedom" (László Öllös, 2014/2).

What do I find lacking in the *Review*? I would very much like to see studies on the highly variable legal and policy environment of language use that match the depth and quality of those we read from Transcarpathian authors. The gap is only partially filled by Eleonóra Sándor's study (The Venice Commission on Minority Legislation Drafts, 2011/2), which merely underscores this absence.

Finally, I find the number of linguistics articles in English insufficient, and I am uncertain whether there are enough in Slovak. There could also be more reviews of linguistic works in Slovak, Czech, and Ukrainian, especially since such reviews are virtually absent from journals published in Hungary.

3. Károly Tóth's research in Dlhá nad Váhom (Vághosszúfalu)

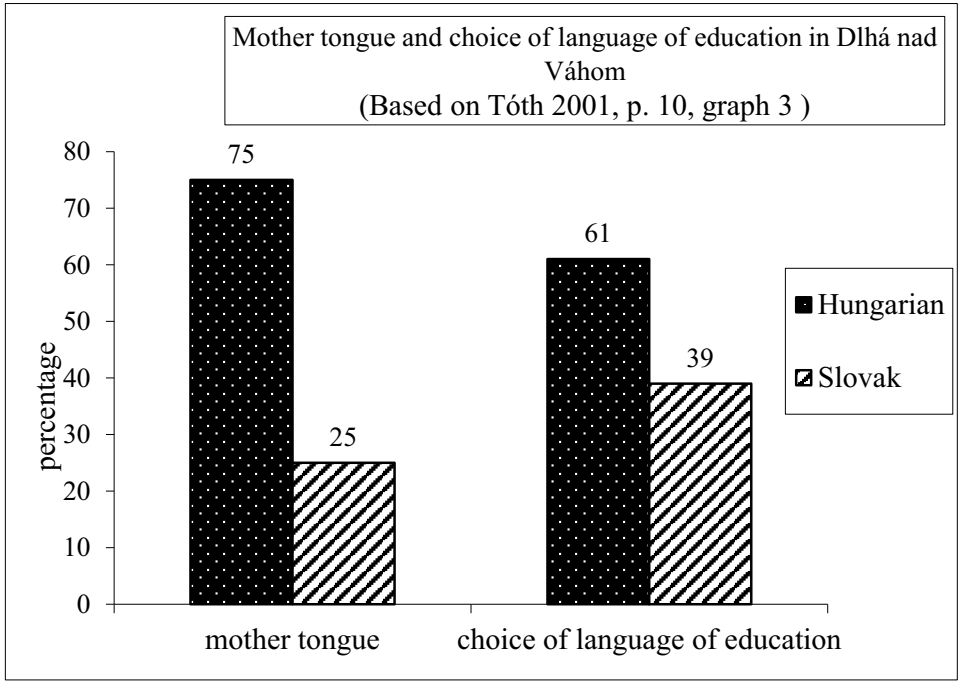
What Károly Tóth unearthed in his native village and later published in the third volume of the *Review* (Tóth 2001, see also in English in Tóth 2003) would have done honor to any distinguished Hungarian linguist. In the year 2000, Tóth witnessed a series of baffling developments in his home village. Dlhá nad Váhom, at that time, was hardly at the mercy of state power—setting aside the broader Slovak national context. In the decade leading up to the study, the village council had consisted entirely of Hungarian-identify-

ing members, the Hungarian school had been re-established, the local congregation had a Hungarian-speaking priest, and still, natural assimilation had nonetheless begun, in the view of some, irreversibly. Villagers sensed a palpable shift in the ethnic makeup of the settlement.

The village had remained unaffected by the post-World War II deportations and population exchanges, since the entire population had undergone re-Slovakization. The village had both Hungarian and Slovak-language schools, as well as a Hungarian kindergarten. What followed, then, was scarcely believable:

> At the request of parents, beginning in September 2000, a Slovak-language class was opened in the previously Hungarian-only kindergarten—something that had never happened before—all this despite the fact that Slovak political parties and organizations were virtually absent from the village. True, during the same period, the activity level of Hungarian organizations, especially cultural ones, was also close to zero. (Tóth 2001: 8)

Figure 1. Mother tongue and choice of language of education among the inhabitants of Dlhá nad Váhom.



Source: Tóth 2001.

Of the village's 883 residents, 75% were Hungarian and 25% Slovak. The Hungarian-speaking population was aging, while the proportion of Slovak-speaking parents was

significant. Among school-age children, Slovak speakers were already in the majority. As shown in Figure 1, school enrollment patterns were tipping toward Slovak-language education (despite the fact that, under conditions of equal age distribution, equal fertility rates, and enrollment in mother-tongue schools, one would expect 75% Hungarian and 25% Slovak-language schooling).

In the 1980s, it would have been unthinkable for a Slovak-speaking young woman marrying into the village (or any newcomer, for that matter) not to learn Hungarian immediately. Two decades later, the situation had shifted dramatically: acquiring Hungarian was no longer taken for granted, and instead it was the family that adjusted its language use to accommodate the Slovak woman.

Figure 2. Grandparents and parents living without their descendants, by ethnicity.

Source: Tóth 2001: 13.

Károly Tóth discovered the explanation for this ethnic transformation when he conducted a meticulous survey of every single household in the village. What he found was that 39% of occupied homes were inhabited solely by parents and mostly grandparents without their descendants. A significant portion of the village's plots and houses were up for sale. For Dlhá nad Váhom, situated on an ethnic borderland, this was particularly ominous: the near-

by growing and affluent town of Šaľa (Vágsellye) had a Slovak majority, and one of the directions of its expansion was precisely toward Dlhá nad Váhom. Figure 2 displays homes where only grandparents or parents lived, broken down by the owners' ethnic identity.

The disproportion is striking: there were 10 times as many elderly Hungarians living alone as there were elderly Slovaks. Moreover, here, inevitably, market forces enter the picture. Elderly people eventually pass away (Hungarians too; no one lives forever), and their heirs sell their homes to the highest bidders, who typically happen to be affluent Slovaks from Šaľa. Thus, in this case, it was spontaneous market processes, not the oppressive policies of a hegemonic nation-state, that triggered a language shift in the village. That is why, by 2001, Slovak-language schooling had become more widespread in the village than the actual language use would have justified, and that is why Károly Tóth (2001: 17) stated that "it is not enough to fight only against forced assimilation. Effective minority protection must also aim to curb, or even halt, natural processes of assimilation."

This study has two major merits. First, only a few years after the nightmare of the Vladimír Mečiar era, it showed that assimilation can also occur spontaneously, driven by market dynamics. Assimilation, when it happens without coercion, is a human right, while forced assimilation constitutes a violation of human rights (see Skutnabb-Kangas 2000). The second strength of this study lies in its thoroughly comprehensive investigation of processes unfolding within a single village. This can only be fully appreciated if one understands that, as Susan Gal put it, "language shift happens village by village" (see Part 5 below).

4. István Lanstyák shakes up the status quo

After earning his Hungarian–English teacher's degree in Debrecen and immersing himself in Western, primarily Anglo-Saxon sociolinguistic scholarship, István Lanstyák launched two "battles" within Hungarian linguistics in Slovakia and the broader Carpathian Basin.

The first centered around the argument that Hungarian is not a Budapest-centered but a pluricentric language, with multiple centers (see Clyne 1992 and Lanstyák 1995). This claim sparked a major controversy lasting over a decade (see Kontra–Saly [eds.] 1998), and it took quite some time before Hungarian linguists came to understand that the pluricentric nature of Hungarian was not a foreign plot but a factual reality whose recognition was in the shared interest of all (see Szilágyi 2008). In doing so, Lanstyák broke a taboo dating back 75 years, to the Treaty of Trianon.

His other act of taboo-breaking was at least as much of a sacrilege, though it targeted a tradition of far older standing. It concerned Hungarian language purism, that cen-

turies-old dogma that there exists a single "correct" Hungarian and its "incorrect" counterparts and that the authority to decide between them belongs not to speakers but exclusively to linguists. Correctness in Hungarian was treated as sacred and untouchable; anyone who denied it was branded unpatriotic, even unfit to be a true linguist. After all, a true linguist was also a language cultivator, and a language cultivator was by definition a purist—one who eradicates foreign words whereever possible and informs "incorrect" speakers that they do not belong among genuine Hungarians.

Well versed in sociolinguistics, Lanstyák quickly spotted the vulnerable spots in this purist tradition. First, it was burdened with linguistic and scholarly shortcomings and descriptive inadequacies. Second, such a prescriptive practice, reinforced by native-language education, stigmatized large segments of Hungarian speakers and undermined their confidence in language use. One of his earliest articles, published in *Irodalmi Szemle* in 1990, already carried a title that amounted to heresy: "Bilingualism and national survival" (Kétnyelvűség és nemzeti megmaradás).

Lanstyák's two-part, extensive study published in *Fórum Társadalomtudományi Szemle* in 2003–2004 bore a long title that deserves to be quoted in full: "Local 'valuable' language varieties, 'respectable' foreign words, 'peculiar' meanings, 'aggressive' abbreviations, 'hybrid' language and their kind: A selection from the rich storehouse of purist nonsense" (Helyi „értékes" nyelvváltozatok, „tisztes" idegen szavak, „visszás" jelentések, „agresszív" rövidítések, „kevercs" nyelv és társaik. Válogatás a nyelvművelői csacskaságok gazdag tárházából).

For his examples, Lanstyák drew on the Hungarian purist journal *Édes Anyanyelvünk* (Our Sweet Mother Tongue), then supported by the Hungarian Academy of Sciences,[1] several ministries, and other public-interest organizations. The "nonsense" he cited was usually written by lay activists, though the journal itself was edited by three professional linguists. Lanstyák's "self-justifying" explanation is worth quoting:

> The statements and opinions cited here were not included in my collection simply because I disagree with them, but because they no longer belong among scientifically acceptable views. Some are linguistic myths, others are linguistic superstitions, and yet others are simply nonsense. (Lanstyák 2003: 70)

1 Since the 1950s, the Hungarian Academy of Sciences' activities in linguistic prescriptivism and language protection have varied in quality, they often contradicted their declared goals, and at times even proved socially harmful. Fortunately, and fortunately for István Lanstyák as well, the same institution has at times also carried out useful work: for example, this two-part study of Lanstyák's was prepared with the support, among others, of the Hungarian Academy of Sciences Domus Board (MTA Domus Kuratóriuma).

Lanstyák went on to present 75 numbered absurdities, dedicating the study as a birthday gift to linguistics professor László Zeman, who had just turned 75. I will not recall any of them here, but I strongly recommend reading, or rereading, the study to anyone interested in questions of language purism and linguistic popularization. Anyone who does so will not only learn a great deal but will be thoroughly entertained. Here are two excerpts:

> The fact that linguistic purism is unsuited to "defending" the Hungarian language beyond the borders or within the enlarged European Union is not a flaw—just as it is not a flaw of a poppy-seed grinder that it cannot darn socks. It was not made for that purpose. The deficiency lies not in purism itself, but in those professional and amateur language cultivators who misuse it. (Lanstyák 2003: 79)

> Recommending *Édes Anyanyelvünk* to lay readers is like recommending a goulash made of venison and beef, in which the beef is spoiled but the venison is not. (Lanstyák 2004: 69)

In my view, Lanstyák's cited studies hold enormous significance in post-transition Hungarian linguistics. I could also mention his excellent work on language ideologies (e.g., 2017) or his analyses of Bible translations (e.g., 2013), but alas, time does not permit. Still, if a proper history of modern Hungarian linguistics is ever written, it will devote many pages to Lanstyák's oeuvre, and not least to the many contributions he made within the pages of the *Review*.

5. Science and politics, scholars, and politicians

Whether Hungarian social scientists, including sociolinguists, should offer advice to Hungarian politicians is a matter of divided opinion. Sociologist Attila Z. Papp recently remarked, for instance: "As a researcher, my goal is not to redeem minority society, but to understand it" (Quoted by Csanda from a book by Tamás Gusztáv Filep, 2021: 176). Many sociolinguists go considerably further than that. Mary Bucholtz (2024), for example, in her review of the volume *Translanguaging for Equal Opportunities: Speaking Romani at School*, edited by János Heltai and Eszter Tarsoly, underscores the importance of promoting social justice in research.

Ten years ago, at the 18th Hungarian Sociolinguistic Conference in Nitra (Nyitra), I conducted an interview with Susan Gal (see: *Interview with Susan Gal*), from which I now quote a segment (transcribed by Szilárd Sebők):

> MK: I am speaking with Susan Gal, professor of linguistics and anthropology at the University of Chicago, whose first book immediately brought her international recognition, and, by extension, shone a light on us Hungarians as well. That first book examined language shift in Oberwart (Felsőőr), a town in Burgenland, Austria. Her fieldwork there hap-

> pened in 1974 (exactly 40 years ago) and the book was published five years later, in 1979.
> [...]
> Now, let me ask a different kind of question. Susan Gal is one of the foremost, if not the first, experts on language shift. That's been known for at least 35 years. She travels widely and is not a stranger to Hungary, either. She has many academic, teacher, and intellectual friends here. I wouldn't even rule out that she has actually seen a Hungarian politician in person—not just on television. Hungarian politicians these days talk a great deal about national erosion, the destructive effects of language shift, and many other real or perceived threats. This is as true of Hungarian politicians in Slovakia as it is of those in Hungary or Transylvania. In other words, the political discourse is full of language shift-related commentary.
> Let me ask you: if a Hungarian politician came to you from a region where they feel language shift needs to be slowed down or stopped, would you give them advice?
> SG.: Let me ask a question in return: are we talking about a Hungarian politician who wants to stop language shift? Say, among Hungarians abroad?
> MK: Yes.
> SG: To be honest, I wouldn't give them advice. And the reason is, as was said yesterday too, I believe, these are local matters. You can make generalizations about them, as we just did, but it is critically important to understand the local situation. Language shift happens village by village, and offering general advice... That's just not something I do.
> MK: Fair enough, but has it ever happened that a Hungarian politician consulted you on such a matter?
> SG: No one in the world has ever done so. And that is worth emphasizing. Because it is one thing for me to say, "If we want to understand what's happening somewhere, let's send a student, let's send a young researcher, let's go and take a look at what's going on there." Because, as we just said, it is very important to understand how local people value language. And that you cannot know in advance, because many different factors come into play. Once we know how they assess things and what they see as the most important issues, then something can be done. Of course it can. Just as something could have been done in Oberwart—or maybe even still could be. But! Thank you for asking. Let me stress again: no one in the world has ever come to me; not that I would have had some general advice to give them. Good, very good question...

Furthermore, let me share briefly one more story in which *Fórum Review* played a significant role. Between 1998 and 2021, I published nearly a dozen essays and articles in *Kritika*, *Élet és Irodalom*, and other outlets about the linguistic genocide afflicting Hungary's Roma population. Yet over the course of those 25 years, I was unable to persuade the Hungarian Central Statistical Office (KSH) to remove the question from the census questionnaire that effectively causes linguistic genocide: the item on "mother tongue: Gypsy (Lovari or Boyash)."

Then *Fórum Review* published an article of mine (Kontra 2021). It was titled "Remarks on the Concept of Mother Tongue" (Megjegyzések az *anyanyelv* fogalmáról), and I sent

it to my friend Pál Péter Tóth, a retired demographer at the KSH. He subsequently forwarded the piece to a colleague—someone with a functional brain, it seems—who promised they would change the question, and, indeed, the 2022 census questionnaire listed Romani and Boyash as two separate languages.[2]

13.1. What is your mother tongue?
Answering this question is voluntary. By responding, you consent to the use of your data. You may mark two answers if you like.
□ Hungarian
□ Bulgarian
□ **Gypsy – Romani (e.g., Lovari)**
□ **Gypsy – Boyash** [author's highlights]
□ Greek
[...]

All of this, however, remains only a partial success because even today we cannot know how many indicated Romani as their mother tongue and how many indicated Boyash since in its aggregated data the Central Statistical Office reported only the following:

Figure 3. Hungarian Central Statistical Office, 2022 Census data [*red marking signals the stress the Author wants to add to the selected items - the Editor's note*]

1.1.6.1 Population by mother tongue, ethnicity, and sex							
Mother tongue, ethnicity	**Mother tongue**						
	1930	1970	1980	1990	2001	2011	2022
Male							
Hungarian	3,925,780	4,923,857	5,130,958	4,915,661	4,528,028	3,967,620	3,952,113
Domestic minorities							
Bulgarian	2 429	..	..	751	651	1,377	1,257
Gypsy (Romani, Boyash)	3,852	16,996	13,826	23,945	24,191	27,804	12,255
Greek	58	..	..	833	984	902	945

We may thus conclude that the Central Statistical Office still finds it difficult to bring an end to the linguistic genocide of Hungary's Roma population. However, at least, after a quarter of a century, they have taken a step in the right direction, and for that, credit is due to *Fórum Review*.

2 These are two languages belonging to different language families. Romani and Boyash speakers do not understand each other, just as Slovaks, for example, do not understand Romanians, and vice versa.

6. Science communication

The *Review* is published by the Fórum Institute, and the institute itself has never shied away from science communication. Sticking just to linguistics, Volume VII (*Language*, eds. Szabómihály and Lanstyák, 2011) of the book series *Hungarians in Slovakia* (Magyarok Szlovákiában), or *Names of Places, Places of Names* (*A hely nevei, a nyelv helyei*) by Horony, Orosz, and Szalay (2012), are not only of the highest scholarly caliber but also outstanding examples of science communication.

In 2017, a radio series titled *Jaffás and Kofolás* (A Jaffás és a Kofolás), hosted by Ildikó Hizsnyai Tóth and György Kerényi, began airing on Pátria Rádió in Bratislava (Pozsony). The show explored the Hungarian language: how Hungarians in Slovakia use it and a range of related topics. In each episode, the hosts interviewed real, flesh-and-blood people (and occasionally linguists) from the Matúšova zem region (Mátyusföld) to Bratislava to Budapest. They did not preach or pontificate but rather opened a window onto the everyday world of ordinary people.

In 2022, Ildikó Hizsnyai Tóth published a book based on these broadcasts*: You're Telling Me? Conversations on the Hungarian Language with Jaffás and Kofolás* (Nekem mondod? Jaffás és Kofolás beszélgetései a magyar nyelvről). The book was priced at 18 euros or 7,000 Hungarian forints at the time. If the Fórum Institute could somehow organize or ensure that this book found its way into every Hungarian school in Slovakia, and moreover, in the entire Carpathian Basin, it would go a long way toward sparking a meaningful, unprecedented conversation about language, nationhood, identity, and other lofty topics that we have never talked about properly before.

Literature

Bucholtz, Mary 2024. János Imre Heltai & Eszter Tarsoly (eds.), *Translanguaging for equal opportunities: Speaking Romani at school.* Berlin: De Gruyter Mouton, 2023. (Book review) *Language in Society* Published online 2024:1–4. [DOI: 10.1017/S0047404524 000137]

Clyne, Michael G., ed., 1992. *Pluricentric Languages: Differing Norms in Different Nations*. Berlin: Walter de Gruyter.

Csanda, Gábor 2021. Filep Tamás Gusztáv: „Azt hittem egykor, hogy csapatmunkában veszek részt". Beszélgetések kisebbségkutatókkal ["I Once Thought I Was Part of a Team": Conversations with Researchers of Minorities]. Kolozsvár: Kriterion, 2019. *Fórum Társadalomtudományi Szemle,* Vol. 23. No 1. pp. 176–179.

Hizsnyai Tóth, Ildikó 2022. *Nekem mondod? – Jaffás és Kofolás beszélgetései a magyar nyelvről* [You're Telling Me? Conversations on the Hungarian Language with Jaffás and Kofolás]. Dunaszerdahely: Nap Kiadó.

Helyesen: Horony, Ákos – Orosz, Örs – Szalay, Zoltán 2012. *A hely nevei, a nyelv helyei. A kisebbségi nyelvi jogok története Szlovákiában 1918–2012* [*Names of Places, Places of*

Names: History of Minority Language Rights in Slovakia 1918–2012]. Somorja: Fórum Kisebbségkutató Intézet. /Jelek a térben, 4./

Interview with Susan Gal, professor at University of Chicago, conducted by Miklós Kontra. In Susan Gal 2018. *A nyelv politikája: nyelvi antropológiai tanulmányok* [The Politics of Language: Studies in Linguistic Anthropology], pp. 335–347. Eds. Vančo, Ildikó and István Kozmács. Nyitra: Nyitrai Konstantin Filozófus Egyetem Közép-európai Tanulmányok Kara. Video-interview transcribed by Szilárd Sebők. Available: [www.youtube.com/watch?v=0hHCObfRSNA]

Kontra, Miklós 1998. Jog, oktatás, nyelvészet és nyelvművelés [Law, Education, Linguistics, and Language Cultivation]. *Kritika,* Vol. 27. No. 1. pp. 20–22.

Kontra, Miklós 1999. *The sociolinguistics of Hungarian outside Hungary*. Budapest: Open Society Institute. [https://scholar.google.hu/scholar?q=The+sociolinguistics+of+Hungarian+outside+Hungary&hl=hu&as_sdt=0&as_vis=1&oi=scholart]

Kontra, Miklós 2016. Újabb nyelvi genocídium [A New Case of Linguistic Genocide]. *Élet és Irodalom,* Vol. 60. No. 47. P. 4.

Kontra, Miklós 2019. *Felelős nyelvészet* [Socially Responsible Linguistics]. Budapest: Gondolat Kiadó. pp. 102–106. [https://mek.oszk.hu/22400/22434/22434.pdf

Kontra, Miklós 2021. Megjegyzések az *anyanyelv* fogalmáról [Remarks on the Concept of Mother Tongue]. *Fórum Társadalomtudományi Szemle*, Vol. 23. No. 1. pp. 23–30. [http://real-j.mtak.hu/21055/1/FTSz_2021_23_1_.pdf]

Kontra, Miklós 2022a. Magyar élőnyelvi kutatások a Kárpát-medencében, 1985–2021 [Hungarian Sociolinguistics in the Carpathian Basin, 1985–2021]. *Fórum Társadalomtudományi Szemle,* Vol. 24. No. 1. pp. 3–15. [https://forumszemle.eu/2022/04/19/magyar-elonyelvi-kutatasok-a-karpat-medenceben-1985-2021/]

Kontra, Miklós 2022b. Hungarian Sociolinguistics in the Carpathian Basin, 1985–2022. *Hungarian Studies Yearbook 4,* pp. 33–65. [https://sciendo.com/it/article/10.2478/hsy-2022-0003]

Kontra, Miklós, ed. 1991. *Tanulmányok a határainkon túli kétnyelvűségről* [Studies on Bilingualism Outside Hungary]. Budapest: Magyarságkutató Intézet.

Kontra, Miklós and Noémi Saly, eds. 1998. *Nyelvmentés vagy nyelvárulás? Vita a határon túli magyar nyelvhasználatról* [Language Preservation or Language Betrayal? A Debate on Hungarian Language Use Beyond Hungary's Borders]. Budapest, Osiris Kiadó.

KSH 2022 Census questionnaire. [https://nepszamlalas2022.ksh.hu/media/KSH_nepszamlalas_2022_kerdoivminta.pdf]

Lanstyák, István 1990. Kétnyelvűség és nemzeti megmaradás [Bilingualism and National Survival]. *Irodalmi Szemle,* Vol. 33 No. 5. pp. 450–456.

Lanstyák, István 1991. A szlovák nyelv árnyékában (A magyar nyelv helyzete Csehszlovákiában 1918–1991) [In the Shadow of the Slovak Language (The Situation of the Hungarian Language in Czechoslovakia, 1918–1991)]. In Miklós Kontra (ed.): *Tanulmányok a határainkon túli kétnyelvűségről*. Budapest : Magyarságkutató Intézet, pp.11–72.

Lanstyák, István 1995. A magyar nyelv központjai [The centres of the Hungarian language]. *Magyar Tudomány,* Vol. 102. No. 10. pp. 1170–1185.

Lanstyák, István 2000. *A magyar nyelv Szlovákiában* [The Hungarian language in Slovakia] (Vol. III: A magyar nyelv a Kárpát-medencében a 20. század végén) Budapest–Pozsony: Osiris Kiadó–Kalligram Könyvkiadó–MTA Kisebbségkutató Műhely.

Lanstyák, István 2003–2004. Helyi „értékes” nyelvváltozatok, „tisztes” idegen szavak, „visszás” jelentések, „agresszív” rövidítések, „kevercs” nyelv és társaik: Válogatás a nyelvművelői csacskaságok gazdag tárházából [Local “valuable” language varieties, “respectable” foreign words, “peculiar” meanings, “aggressive” abbreviations, “hybrid” language and their kind: A selection from the rich storehouse of purist nonsense], Part 1 and 2. *Fórum Társadalomtudományi Szemle,* Vol. 21. No. 4. pp. 69–98 and Vol. 22. No 1. pp. 51–76.

Lanstyák, István. 2013. A Károli-biblia 20. és 21. századi revízióinak néhány kérdéséről [On some issues of the 20th- and 21st-century revisions of the Károli Bible]. *Fórum Társadalomtudományi Szemle,* Vol. 15, No. 2. pp. 3–34.

Lanstyák, István 2017. *Nyelvi ideológiák (általános tudnivalók és fogalomtár)* [Language ideologies: General notes and glossary]. [https://web.unideb.hu/~tkis/li_nyelvideologiai_fogalomtar2.pdf]

Skutnabb-Kangas, Tove 2000. *Linguistic Genocide in Education – or World-wide Diversity and Human Rights?* Mahwah, N. J.: Lawrence Erlbaum.

Szabómihály, Gizella and Lanstyák István, eds. 2011. *Nyelv* [Language] (Magyarok Szlovákiában [Hungarians in Slovakia], Vol. VII). Somorja, Fórum Kisebbségkutató Intézet.

Szilágyi, N. Sándor 2008. A magyar nyelv a Magyarországgal szomszédos országokban [Hungarian in the neighboring countries of Hungary]. In Fedinec, Csilla, ed. *Értékek, dimenziók a magyarságkutatásban* [Values and dimensions in Hungarian studies]. Budapest: Magyar Tudományos Akadémia Magyar Tudományosság Külföldön Elnöki Bizottság, pp. 105–117.

Tóth, Károly 2001. Egy falu az etnikai peremvidéken: Vághosszúfalu [A village on the ethnic periphery: Dlhá nad Váhom]. *Fórum Társadalomtudományi Szemle,* Vol. 3. No. 3. pp. 3–20.

Tóth, Károly 2003. A Village on the Ethnic Periphery: The Case of Dlhá nad Váhom, Southern Slovakia. In: Torsello, Davide–Pappová, Melinda (eds.): *Social networks in movement: Time, interaction and interethnic spaces in Central Eastern Europe*. Šamorín–Dunajská Streda: Forum Minority Research Institute–Lilium Aurum, pp. 117–140.

ATTILA SIMON

Notes on a Volume about János Esterházy

Michal Schvarc: *János Esterházy a jeho miesto v moderných slovenských dejinách* [János Esterházy and his place in modern Slovak history]. Ministerstvo zahraničných vecí a európskych záležitostí Slovenskej republiky, Bratislava, 2023, 191 p. ISBN 9788088726845.[1]

János Esterházy remains a figure of exceptional importance in 20th-century Slovak and Hungarian history, and new publications about him usually spark heated reactions. Michal Schvarc's recent bilingual volume (in Slovak and English), however, has attracted little attention outside a narrow circle of specialists. This muted reception is not necessarily a disadvantage: the noisy media storms that so often surround Esterházy in both Hungarian and Slovak public life rarely encourage thoughtful scholarly debate. It may also reflect Schvarc's conscious choice not to present Esterházy as a hero, a traitor, or a spy. His balanced and measured account, precisely because it avoids extremes, fails to meet the sensation-driven expectations of today's public discourse.

The news of a new volume on Esterházy was at first encouraging, since a thorough Slovak assessment of this Hungarian politician has long been awaited. Unfortunately, that wait is not yet over, as the 191-page hardback is not a political biography. The author's historical contribution amounts to only about 30 pages (60 in the bilingual edition), followed by a much longer selection of documents. Adding to the problem, the book was not published by an academic institution but by the Slovak Republic's Ministry of Foreign Affairs—a detail that in this region is rarely a good sign. Government bodies seldom support the publication of scholarly works, and when they do, their motives are usually quite evident. In this case, the intention seems clear enough: to counter Hungarian political and historiographical initiatives on Esterházy and to challenge the rather one-sided image of him that they often promote.

1 A closely related article of the Author was published in Slovak language in *Historický časopis*, 72, 4, 2024, 841-848.

The author was thus in a somewhat difficult position: his primary field of research is the history of Germans in Slovakia, and he has rarely engaged with the history of the Hungarian minority. As a result, the book's main text is not based on his own original research. Instead, Schvarc draws on earlier studies and the documents included in the volume to take a stance on the contested questions surrounding Esterházy's life. Whether he succeeds is something this review attempts to assess. What can be said at the outset, however, is that even if I do not agree with him on every point, this is unquestionably a serious and honest work of scholarship and one that may well make an important contribution to the ongoing historical debates about Esterházy.

Although the archival documents appear at the end of the volume, they are perhaps the best place to begin, as they represent the book's greatest value. The 25 sources, published in the original Slovak, German, and English, were until now either unavailable or very difficult for readers to access. Slovak readers in particular have lacked the opportunity to form their own judgments on the subject based on contemporary documents. This makes the publication of these sources especially important: they broaden the interpretive framework of the historian's text and introduce a kind of multi-perspectivity into the volume. In effect, they allow readers to reconsider the author's arguments and, if they wish, to interpret the main text differently. From this perspective, Documents 1 and 2, which are Esterházy's two interrogation records from 1945 and 1949, respectively, are especially valuable. They are among the very few sources in which Esterházy speaks in his own voice.

The authorial text of the volume reads like a polemical essay. From the outset, Schvarc makes clear that he does not aim to provide a comprehensive treatment of the subject but instead to focus on a few key issues at the heart of debates about Esterházy. He therefore concentrates on three main themes: Esterházy's role in the territorial disintegration of Czechoslovakia in 1938-39; his activities during the Second World War, with particular attention to his stance on the Jewish question; and finally, the trial brought against him before the National Court.

In essence, the central claim of the relatively brief authorial text is that Hungarian historiography's portrayal of Esterházy is biased and often unscientific, while doubts about the fairness of his trial are unfounded. Stated this bluntly, this argument sounds categorical; in practice, however, the text is more balanced and nuanced. By "Hungarian authors," Schvarc primarily has in mind Imre Molnár, the scholar who initiated research on Esterházy, has published several books on him, and is now actively involved in promoting his beatification. According to Schvarc, Molnár's biography *Esterházy János élete és mártírhalála* (The Life and Martyrdom of János Esterházy, Budapest: Méry Ratio, 2010), which is already available in several languages including Slovak, is marked by the arbitrary use of sources and, at times, even by fabrication. For this reason, he considers it closer to hagiography than to scholarly biography.

This criticism carries significant weight, since Hungarian memory politics (and its followers in Slovakia) have fully embraced Molnár's image of Esterházy, placing it at the center of the Hungarian master narrative. In this sense, Schvarc's critique of Molnár amounts to a sweeping judgment on Hungarian memory politics itself, which has turned Esterházy into a rigid symbol, effectively shutting down any genuine scholarly debate about him. At the same time, those who try to offer a more nuanced view of Esterházy are often branded as traitors to the Hungarian cause or as agents of foreign interests.

Yet this cannot be blamed on Molnár alone. He has devoted much of his life to studying Esterházy's legacy and to ensuring that the image he has drawn is known and accepted by a wider public. He is not simply one researcher among many: he is *the* Esterházy scholar, bound to his subject by a strong emotional attachment and firmly convinced of Esterházy's political and personal greatness. Such passion, while admirable, does not necessarily strengthen the scholarly rigor of his work. Historiography is, at its core, a discursive enterprise, requiring the tools of critical inquiry and a willingness to doubt. The process of beatification, by contrast, demands above all faith and commitment—qualities that sit uneasily alongside doubt.

Even so, Molnár's work possesses undeniable value. His efforts to uncover sources and present Esterházy to a wider public cannot be dismissed. His conclusions may at times be exaggerated or biased (as Schvarc argues), and his use of sources (including what he chooses to omit) can and should be criticized. Yet the knowledge he has assembled cannot simply be discarded wholesale. It is not enough to dismiss Molnár as unreliable; rather, each of his claims must be weighed individually and agreed with, debated, or refuted.

The first major period of Esterházy's political career was the 1930s, when, as "Budapest's protégé," he was chosen to lead the National Christian Socialist Party (Országos Kereszténységszocialista Párt; OKP) and, from 1936, became co-chairman of the United Hungarian Party (Egyesült Magyar Párt; EMP). Schvarc rightly observes that one of the key drivers of Esterházy's conduct during this period was Czechoslovakia's nationality policy, which ignored the needs of the Hungarian community and, thus, inflicted many grievances. The author is also correct in noting that this shortsighted nationality policy contributed to the sharp opposition stance of Hungarian politics in Slovakia and, in the long run, pushed the Hungarian population into Budapest's arms.

The author also rightly notes that Esterházy, acting in line with and in close cooperation with Budapest's policies, primarily sought the disintegration of Czechoslovakia, which could have been the first step toward revising the Treaty of Trianon borders. This inevitably raises the question, often posed in Slovak historiography, of whether Esterházy was in fact an agent of Budapest. Schvarc is more cautious on this point, and rightly so, since Esterházy's close ties with Budapest (like those of other Hungarian politicians in Slovakia) were by no means secret or conspiratorial. The Czechoslovak

authorities, whose network of informants also extended into the Hungarian parties and who were well informed about all developments in Slovak Hungarian political life, were fully aware of these connections and tacitly accepted that Hungarian politicians in Slovakia, including Esterházy, consulted Budapest on every major step and reported back on the course of local politics.

While highlighting Esterházy's ties with Budapest and his efforts toward border revision, Schvarc also notes that, unlike his co-chair Andor Jaross, Esterházy sought to keep more distance from Nazi Germany and the Sudeten German Party. Even in the turbulent weeks of 1938, he kept the EMP and the Hungarian population on constitutional and parliamentary ground.

Through his family background, Esterházy may have been more conscious than many other Slovak Hungarian politicians of the importance of coexistence with the Slovaks. Yet he did not treat them as equal partners. For Esterházy, winning over the Slovaks primarily served the goal of advancing the restoration of the millennial state of Saint Stephen. Unlike many of his contemporaries, and especially the leaders of Budapest's politics, he was probably not captive to the false illusion that Slovak society longed to return to the framework of the Hungarian state. He may well have been influenced by his more enlightened sister, Lujza Esterházy, who argued that unless Hungarians finally acknowledged their wrongs against the Slovaks and introduced social and economic reforms that would make Hungary attractive, any expectation of the Slovaks' return was nothing but an illusion.

Regarding Esterházy's role during the Slovak state led by Jozef Tiso, Schvarc focuses on two aspects: first, the Hungarian politician's relationship to the regime and Nazi ideology and, second, his position on the Jewish question. It is perhaps unsurprising that in both matters he disputes Hungarian historiography. Hungarian authors emphasize Esterházy's strong Christian convictions and thus his opposition to Nazism, portraying him as an opponent of the Tiso regime. Schvarc argues that while Esterházy's Christian Social orientation did indeed place him in ideological conflict with Nazism, it did not make him an active opponent of the Nazi system. He applies the same reasoning to Esterházy's conflict with Franz Karmasin, which, in Schvarc's view, stemmed not from anti-Nazi convictions but from personal animosity between the two politicians and the rivalry between the Hungarian parties and the Carpathian German Party (Kárpáti Német Párt) for the votes of Slovakia's German population.

The author is undoubtedly correct in noting that, as a member of the Slovak parliament, Esterházy also played a part in the establishment of an authoritarian regime marked by totalitarian traits. His parliamentary position, however, was a peculiar one: he entered the legislature on the Hlinka party's list (there was no other way), yet as the sole Hungarian member he often assumed a kind of opposition role. Moreover, since he had no influence over either the ruling party or government policy, his responsibility was of a different order than that of ministers or members of the ruling party.

Since few ego-documents survive, it is difficult to form a balanced judgment of Esterházy (though that does not prevent many from making highly categorical claims). However, one point is clear: he was neither a Nazi nor a fascist (as some have labeled him), nor did he sympathize with such ideologies, something he repeatedly declared openly. Moreover, this view is not only based on what we know today: many of his contemporaries, including those on the opposite end of the political spectrum—such as the left-wing Rezső Szalatnai or the communist Zoltán Fábry—thought the same. They had no reason to defend him, yet they did, almost certainly because they understood that Esterházy's stance played a role in keeping both the EMP and the vast majority of the Hungarian population from rallying behind the ideas of National Socialism or the system modeled on it by Jozef Tiso. Esterházy's position was no secret to either the Germans or to the Arrow Cross regime led by Szálasi, which seized power in Hungary with German assistance on October 15, 1944. It is no coincidence that, immediately after taking power, the Arrow Cross sought to sideline Esterházy and replace him with a more pliant figure. In the end, however, they failed.

With that said, his rejection of Nazi ideology and his deep religiosity did not prevent Esterházy from agreeing with some of Nazi Germany's goals and maintaining active contact with Reich officials. This pragmatic stance was, to a degree, part of his duty as leader of the Hungarian community, but this too deserves further research

As for Esterházy's position on the Jews, Schvarc's conclusions are partly convincing, since antisemitism was not alien to Esterházy, and his statements suggest he approved restricting the alleged or real Jewish social and economic influence by numerus clausus. This, one could add, carried a different connotation in that period, before Auschwitz. By contrast, the racial segregation, deportation, and annihilation of the Jews stood in sharp opposition to his ethics derived from Christianity. Moreover, as the responsible leader of the Hungarian community in Slovakia (something that must always be taken into account in his case), he was reluctant to support measures that entailed the severe discrimination of any minority.

Fortunately, on this issue we have an authentic source from Esterházy himself, as he expressed his opinion during the vote in the Slovak parliament on May 15, 1942. Although every political statement must be treated with caution, there is no reason to doubt his words:

> The bill on the deportation of the Jews is of such a nature that I cannot in any way make it my own, and I cannot vote for it. From my earliest youth I have always been of an anti-Jewish disposition and will remain so; however, this does not mean that with my vote I will support a law that tramples upon every divine and human right. In the deportation of the Jews, the Slovaks are not deporting them as a denomination, but as a race, and this is yet another reason for me to vote against the bill. The Hungarians in Slovakia constitute a national minority, and therefore it is absolutely impossible for us to accept and make our own a bill that grants the majority the right to deport a minority…

In the matter of Esterházy and the Jewish question, perhaps strangely, the most revealing evidence lies in what he did *not* say and did *not* write. At a time when mocking Jews was a widespread trend in Slovakia, and Slovak newspapers routinely published anti-Semitic articles, Esterházy made no such statements. Moreover, the publications under his supervision refrained from the vulgar anti-Semitic tone common elsewhere. That restraint held considerable significance in that context, yet he remained silent even when Hungarian Jews, among them his former party companions and Hungarian Jews living in the annexed territories, were confined to ghettos under inhumane conditions and later deported to death camps. That silence is equally telling.

Perhaps the answer lies in the mix of Esterházy's pragmatism and the habits he brought from interwar politics. Between 1920 and 1938, Hungarian politics in Slovakia was clearly marked by a distance from antisemitism. This was true both of Esterházy's own party, the OKP, and to Andor Jaross's Hungarian National Party (Magyar Nemzeti Párt; MNP). The only difference was that the OKP had no Jewish members, while the MNP did. Still, it was understood in both parties that Jews themselves were a minority, and since most of them spoke Hungarian, they could serve as potential allies against Prague.

With much of the party elite transferred to Hungary, Jaross and his followers immediately joined the camp of antisemitic agitators. In 1944, Jaross became Minister of the Interior, responsible for the deportation of Hungary's Jews, and after the war his life was justly ended on the gallows. By contrast, the branch of the EMP that remained in Slovakia continued to keep its distance from antisemitic agitation. Undoubtedly, this was due in part to the personal qualities of Jaross and Esterházy but even more to political interests, for while Jaross and his circle no longer needed the Jews as allies, Esterházy and his circle still did.

Schvarc acknowledges that the Hungarian politician did in fact provide assistance to certain persecuted individuals and families. He questions, however, whether Esterházy played as significant a role in helping Jewish refugees in 1942, when many were fleeing from Slovakia to Hungary, as Imre Molnár and István Janek assert. To support his argument, Schvarc cites several sources that make no mention of Esterházy's involvement. Yet if we want a clear picture, the sources referenced by Molnár must also be examined in detail; this step cannot simply be omitted.

The last part of Schvarc's study addresses Esterházy's 1947 trial before the National Court in Bratislava. He disputes those who question procedural fairness and interpret his conviction as a judgment on the entire Hungarian minority. Schvarc insists that ethnicity was not decisive; one may debate the severity of the sentence, but to call the trial manipulated without evidence is misleading.The issue is not that Schvarc dismisses the views of Molnár and others but that he does so without systematically addressing the criticisms of the trial point by point. Instead, he relies on a familiar political argument: that reopening people's court verdicts would set a dangerous precedent.

Yet serious doubts have been raised about the objectivity of retributional justice, and one of the strongest arguments comes from Anton Rašla, the prosecutor in the Tiso trial. Reflecting on a specific case, he described the practice of the Slovak people's courts as follows:

> In that revolutionary political process (as the courts were between 1945 and 1947), the issue was not really about you personally. It was about ensuring that no one could later accuse the new political leadership of failing to distance itself from the "fascist regime of the Slovak state." Our goal was to prevent familiar accusations, like those I myself heard during the trial ("you are all traitors"), from being directed at the entire nation. To avoid making the whole nation the target of vengeance, we had to "find the guilty," even if it meant picking names out of the phone book.

This was not unique to Slovakia; similar practices occurred in other countries. However, in Slovakia, ethnicity played a role alongside political considerations, and even Slovak scholarship admits that the people's courts often judged Hungarians or Germans more harshly than Slovaks.

In light of the above, I still consider it legitimate to raise questions about Esterházy's trial; indeed, this is one of the historian's fundamental tasks. There is no doubt that retributional justice was a legitimate and necessary element of the processes that brought the war to a close. It is also clear that, although the practice of people's courts at the time may offend our modern sense of legal fairness, that does not mean it was necessarily unlawful in its own day. The problem, then, is not that Esterházy was tried and convicted but rather the circumstances of the trial and the unusual severity of the sentence.

From the outset, Esterházy was at a disadvantage. At his trial on September 16, 1946, he could not be present in person (through no fault of his own) and was represented by a state-appointed lawyer. This, however, was neither unusual nor unlawful. What is more striking is that, despite the seriousness of the charges (and, as it turned out, of the sentence), the entire trial lasted only a single day. This is particularly noteworthy given that the best-known defendants, including Tiso, Mach, Ďurčanský, and Vojtech Tuka, faced people's court trials that were preceded by months of preparation, giving the defense sufficient time to prepare, of which they made full use. The joint trial of Tiso, Mach, and Ďurčanský lasted four months, while Tuka's trial ran for 17 days. By contrast, Esterházy's trial was concluded in just one.

Had this taken place immediately after the war, in the revolutionary atmosphere when swift death sentences by people's courts were common even in Western Europe, it would be easier to understand. However, in the autumn of 1947 there was no justification for such haste, especially when a human life was at stake. To make matters worse, Esterházy's appointed defense attorney received the indictment only five days before the trial and was not permitted to call defense witnesses, and the death sentence was delivered with striking speed.

The severity of the sentence itself may also raise doubts. Schvarc stresses that the Slovak National Council's Retribution Decree No. 33/1945, under which Esterházy was prosecuted, applied to all members of the Slovak parliament. Yet of the 82 individuals who had held a parliamentary mandate at some point between 1938 and 1945, around 40% were never brought to trial. Of those who were tried, nearly one-third were either acquitted or received only a verbal reprimand. Only a few were sentenced to long prison terms (over 10 years), such as Matej Huťka, who had played an active role in the deportation of Jews. A death sentence was handed down in just three cases involving individuals who, between March 14, 1939, and April 1945, had served as members of the Slovak parliament without holding an executive position: Josef Steinhübel, Sigmund Keil, and János Esterházy. Two of these were of German nationality and one Hungarian. Moreover, in none of their biographies does one find facts that would justify a death sentence. Meanwhile, not a single Slovak legislator received such a severe punishment, not even those who, unlike Esterházy and Steinhübel, had eagerly voted in favor of the law enabling the deportation of Jews. That may, of course, be a coincidence, but I would not bet on it.

According to Michal Malatinský, a scholar of the people's courts, the Slovak National Court in Bratislava handed down 17 death sentences. His list, however, omits Franz Karmasin, leader of the Deutsche Partei, and thus counting him brings the total to 18. The vast majority of these cases involved individuals who had committed war crimes in the conventional sense: the assault, killing, or deportation of civilians; the mistreatment of prisoners of war; or acts of wanton destruction. They were all punished with the ultimate penalty. Among those executed were the highest-ranking representatives of the Slovak state (President Jozef Tiso, Prime Minister Vojtech Tuka, and Foreign Minister Alexander Ďurčanský) who, by virtue of their positions, were held accountable for everything that occurred in Slovakia between 1939 and 1945. Also sentenced to death were figures directly responsible for the Holocaust and the physical violence inflicted on Jews (such as Anton Vašek and Otomar Kubala), as well as those who committed documented war crimes on the Soviet front or during the suppression of the Slovak National Uprising (SS General Hermann Höfle and Ladislav Kleinnert).

Esterházy did not fall into any of the above categories. He was convicted under Paragraph 2 of the Slovak National Council's Retribution Decree No. 33/1945 as a "domestic traitor," specifically under point (a): undermining Czechoslovakia and the democratic order and point (d): promoting the activities of fascist occupiers and domestic traitors and verbally defaming the Soviet Union and its allies. Of the 83 defendants before the National Court in Bratislava, eight others were charged solely under these same provisions, but they were either acquitted or given lighter sentences. Only Esterházy received such a severe punishment.

If the question is simply whether Esterházy was guilty of these charges, the answer must be yes. He had, beyond doubt, repeatedly made disparaging remarks about both the Soviet Union and the Czechoslovak Republic. Although he was not a key figure in the creation of Slovak autonomy or the independent Slovak state—the two events identified in the decree as central to Czechoslovakia's breakup—his political activity nevertheless contributed to the country's disintegration in 1938–1939, as did that of many Czech and Slovak politicians, often to a much greater extent than Esterházy's. Yet none of them received the death penalty. The real issue, then, is whether Esterházy's conduct under these two charges truly amounted to crimes deserving capital punishment, and why he alone was condemned to the harshest possible sentence for actions for which others escaped with little or no penalty.

The most plausible conclusion is that Esterházy was treated with exceptional severity because he was Hungarian and that his sentence was intended as a judgment on the Hungarian community as a whole. This view is reinforced by data published by Antonín Rašla on retributional proceedings, which show that 68% of those convicted (including district and local people's courts) were of Hungarian nationality. This was no coincidence. It was directly tied to the population exchange agreement between Czechoslovakia and Hungary, which gave Czechoslovakia the right, beyond the parity-based transfers, to unilaterally expel any Hungarians convicted as "major war criminals" under Paragraphs 1–4 of the Slovak National Council's Retribution Decree No. 33, or as "minor war criminals" under Paragraph 5 of the same decree.

Accordingly, on February 13, 1946, the Bratislava Office of the Interior Commissioner instructed regional branches of the National Security Corps to bring charges against as many Hungarians as possible and to do so rapidly. That summer, the Office of the Justice Comissariat directed all people's courts to deal exclusively with cases against Hungarians, while prosecutors were encouraged to file mass indictments without the need for supporting investigations. It was deemed sufficient, for example, if an individual had taken part in welcoming Hungarian troops in 1938. Yet most of these mass indictments were never heard by the district people's courts, which dismissed them for lack of credible evidence.

In any case, the prevailing atmosphere and conditions are well illustrated by the words of Ivan Štefánik, the interior officer of the Commissariat acting as the Slovak government. Explaining to Daniel Okáli in Paris why the planned number of Hungarians had not been brought before the people's courts, he remarked: "I had no authorization to order judges to declare guilty even those about whose activities we had no information."

While this does not prove that Esterházy's trial was rigged, it does show that the government was willing to manipulate the justice system in order to achieve its nation-state objectives. For this reason, I do not find it far-fetched to suggest that, alongside the

thousands of Hungarians sentenced to lesser punishments, the authorities also needed a symbolic verdict: one that would publicly justify the charge of collective guilt against Hungarians proclaimed in the Košice government program. That thankless role fell to János Esterházy.

Overall, my position does not fundamentally differ from that of my colleague Schvarc: I also accept the historical legitimacy of the retributional proceedings carried out under Decree No. 33/1945 of the Slovak National Council, as well as the fact that Esterházy was brought before the National Court. Where I part company with him, however, is in my view that the trial of Esterházy and the sentence handed down were problematic in several respects. The arguments of those who criticize the trial cannot simply be dismissed, and this is a subject that still calls for further research.

Because deeper research is still lacking (for instance, we know very little about the first 30 years of Esterházy's life, his education, or even his family relationships), we can for now only sketch the broad contours of his life and work. What emerges is the portrait of a real, flesh-and-blood man who was a contradictory figure in both his private and political life. To be fair, he lived in a profoundly contradictory age. He was not a democrat who could be held up as a model for young people today, but neither was he a fascist. He was a conservative, right-wing politician who, before 1938, saw the revision of the Trianon borders as his chief mission, and after 1939 shifted to defending the interests of Hungarians within the Slovak state. In pursuing these goals, he dealt with both allies and opponents in a largely pragmatic way.

Esterházy lived at a time when very few managed to preserve their human and political integrity, their consistency, or their moral purity. Although some still regard him as one of those few, I do not. His documented efforts to save Jews show that he was capable of self-reflection and never crossed the boundaries set by his deep Christian convictions. This deserves recognition, and it should also be acknowledged that postwar justice treated him unfairly. However, that is not the same as calling for his legal rehabilitation. That is not the historian's task.

Before getting there, however, it may be worth recalling Štefan Šutaj's proposal: Slovak historiography should approach Esterházy with the seriousness he merits, by first collecting all the relevant sources and then building its own account of him. Only on this basis can a truly meaningful scholarly debate begin about who János Esterházy was.

BOOK REVIEWS

Tóth, János Aldemár OSB: Ilyennek láttam bencés rendtársaimat [This Is How I Saw My Benedictine Confreres]. Budapest, METEM, 2024, 100 p. ISBN 978-615-5826-41-2.

This modestly sized publication contains the life-history interview of Benedictine monk János Aldermár Tóth (1921–1986). His confrere, Szilveszter Sólymos, recorded the interview on tape in September 1977, presumably at Pannonhalma. The recording of Father Aldemár, who spoke with innate naturalness, was preserved by parish priest László Sztyahula, who forwarded it to Pannonhalma a few years ago. The interview transcript was edited by Ádám Somorjai OSB, who provided not only an introduction but also numerous other important and useful pieces of information, which (besides the footnotes, included in the Appendix) contain: a list of the Benedictine monks of Komárom between 1950 and 1989; the fathers' various work assignments, divided into categories; their necrology; biographies; the monastic names of the aforementioned Benedictines; an index of personal and geographical names; a map; a Hungarian–Slovak glossary of names for the map; and illustrations. This is the 3rd volume in the series *Our Distinguished Benedictine Teachers*, with Asztrik Várszegi as the responsible of publisher.

It may already be evident from the above paragraph that we are dealing with an unparalleled wealth of source material. (Here we need not even mention the editor's exceptionally careful additions: once again, Ádám Somorjai, emeritus Vatican archivist, has drawn upon his astonishing reservoir of knowledge. For those unable to access this volume, his open-access publication *Benedictines in Komárom 1919–1998* is recommended: https://doi.org/10.61795/fssr.v27y2025i2.05.)

With all-encompassing attentiveness, János Aldemár Tóth speaks about his life—from his childhood up to the time of the conversation—and his narration, vivid and oral in style yet organized and chronologically consistent, goes into such detail and nuance that it offers a rich treasure trove for the history of education, ethnography, historical studies, and sociology alike.

Being from Deáki, in recalling the experiences of his childhood, he mentions not only the local municipal, school, or clerical leaders—among them, naturally, Jusztinián Serédi—but also the close relationship between the family of the then young altar boy (the future Benedictine father) and the later Prince Primate. Thus, for example, he notes about Marcell Serédi:

He was said to be a very talented man; what we know of him is that he carried out optical experiments, but his early death prevented him from perfecting this work. I heard that Master Jusztinián wanted to become a *matéta* [i.e., a mathematician] so that he could continue his brother's invention, but Abbot Primate Ipoly Fehér sent him to Rome instead.

Similarly, already at the beginning of the narrative we learn that after completing the fifth year of elementary school, János Aldemár Tóth entered the high school in Komárom. Drawing on the impressions he experienced there firsthand as a student, he presents not only the entire teaching staff but also the student body: many classmates came from the Szepes region and from the area around Kassa, and two even came from Subcarpathia. The context of the story remains the First Czechoslovak Republic, created after the change of borders after WWI, except for the so-called "Hungarian times," from the First Vienna Award until the end of WWII.

It was during this intermezzo, in 1940, that Aldemár entered the Order; at the time, he was a history student under Gyula Szekfű. However, soon again he was to live out the fate of Hun-

garians in Czechoslovakia: internment, prison, and labor camps in Western Bohemia—roughly in the area near Casanova's resting place.

On page 62 of the book, we see a photograph of János Aldemár Tóth on a hillside, wearing a beret, shirt-sleeves rolled up, breviary in hand, praying. The fulfilment of his life was in his service as assistant priest and parish priest. (His life is discussed in greater detail by Imre Molnár in the monograph *Deáki* [Száz Magyar Falu Könyvesháza, Budapest, 2002]).

There is no opportunity here to present the subject of the publication chapter by chapter or thematically. Overall, it clearly presents a society of shared fate, a community of destiny, portrayed through a single life and life story. This life, in one way or another, belongs to many of us, either because our roots can be traced back to that era or because they are grounded in it. However, since I have already mentioned the school, in the Komárom secondary school the author had 91 classmates, of whom 87 eventually graduated (27 of them girls).

Briefly on the introduction of his confreres, he recounts, for example, that although Lucián Bíró knew Slovak, he also knew that in Znióváralja, thanks to the local secondary school, there were many educated people. "That is why he had to prepare much more for his Slovak sermons than he once did for his Hungarian ones. This was partly the reason why his sermons gradually gained such great renown." (Aldemár's confrere, the Roman Catholic priest Lucián Bíró, spent five years interned in Znió.)

Of Menyhért Czuczor, who likewise suffered internment, imprisonment, monastic forced labor, and so on—and with whom he spent five years—he recounts:

When we were sent to the Czech lands for more serious work, he was placed in a textile factory. After a few weeks of work the foreman said of him, "He is such an excellent skilled worker. It is as if he had already been working in the factory for 10–20 years."

This is a work that enriches the reader with profound insights. Ádám Somorjai is right when he writes of János Aldemár Tóth's oral history:

Under the conditions of the one-party state, it required great courage to give such a detailed account of the lives of his Benedictine confreres. Before his dear fellow monk, the Benedictine teacher with a historian's interest and a vivid memory summarized the troubled fate and history of the Hungarian Benedictine confreres in Slovakia.

I would add that the author's origins, his family and communal life, his fate, the vicissitudes of history (not least the realities of the one-party regime), and above all his personality and character obliged him to speak with courage and frankness—indeed, no other path lay open to him.

Gábor Csanda

Deák, András Miklós – Somorjai, Ádám OSB – Zinner, Tibor: In Refuge. American Diplomats on Cardinal Mindszenty (1956–1970). Magyar Napló Kiadó, 2025, 872 p. ISBN 978-963-5411-566.

In 2025 the *Magyar Napló* Publishing House expanded its series on Cardinal József Mindszenty with a valuable new source – an especially timely addition, coinciding with the 50th anniversary of the Cardinal's passing away on May 6, 1975.[1] The first volume in the series – *In Refuge: American Diplomats on Cardinal Mindszenty, 1957–1970*[2] – was launched at a commemorative conference organized by the Ministry of Foreign Affairs and Trade of

1 See the original Hungarian language book review: Vendriczki, Róbert: „Mindszenty bíboros menedéke – a Magyar Napló angol nyelvű »ikerkötete«." *Magyar Napló* 2025/9, 68-70.

2 Magyar Napló Kiadó Budapest, 2019.

Hungary in October 2019. The second volume in the series assumed a bilingual format: *The Host and His Guest: Chargé Garret G. Ackerson and Cardinal József Mindszenty (1957–1961)*, authored by A. M. Deák and Ádám Somorjai OSB.[3] The third volume – *Secrets of the American Archives: Selected Writings on Cardinal Mindszenty* – included nine studies by Father Somorjai.[4] This collection contributed significantly to the further development of the "Mindszenty family of publications", revealing an even more complex portrait of the Cardinal than previous works.

Readers, comparing the first and the newly published fourth "family member", will immediately realize that they are conceived of as twin volumes. This is made visually evident by the identical design of their covers. The front cover features a portrait of Cardinal Mindszenty, superimposed over the red hues of the Hungarian and American flags blending together. The back cover includes a quotation from the legal advice issued by the U.S. Department of State in 1960 that clarifies that the United States provided the Cardinal with humanitarian *refuge*, rather than political *asylum*. It is commendable that both volumes accurately reflect this legal distinction in their titles.

Although the two are presented as twin volumes, they are not "identical twins." The edition of 2019 published documents from the period 1957–1970, whereas the new expanded edition also includes materials from 1956. Specifically, the latter incorporates documents produced in November and December of 1956, thereby expanding the "twin" volume with 19 additional archival records. It is extremely helpful that page 8 of the new volume presents a photograph of the handwritten register (The Duty Log), listing the documents dated between 9 November and 18 December 1956. Among these is a notable entry concerning the message that Cardinal Mindszenty addressed to the Secretary General of the United Nations, Dag Hammarskjöld (1953–1961) on 9 November. It is in this context that Chargé d'Affaires Wailes reported to Washington that he had refused to allow the mission to serve as a base for the Cardinal's political activities. An official reply, dated 12 November, confirmed that the Legation could not be used as a platform for any political or ecclesiastical activities. Thus, just eight days after Mindszenty's arrival at the U.S. Legation on Szabadság tér[5], an official American document clarified that he had been granted humanitarian *refuge*, not political *asylum*. The title of the English edition – *In Refuge* – accurately reflects this legal reality. The former status, based on humanitarian law, was intended to protect the Cardinal's life and physical well-being while did not allow any engagement in political or ecclesiastical leadership activities.

And now, let us highlight the great contribution of Donald B. Kursch (b. Brooklyn, 1942) to the survival of the *Duty Log*. After the conclusion of the Cardinal's refuge at the Legation, it emerged that the duty officers had been keeping a handwritten logbook recording all incoming and outgoing diplomatic communications, details about visitors, confessors and contact persons in case of emergency. How did we, researchers discover this source several years later? Without Kursch's intervention, the *Duty Log* would have likely been lost to scholarship. From 1971 to 1975 Kursch served as a consul and later as a diplomat responsible for economic affairs at the U.S. Embassy in Budapest, returning for a second posting in 1986 as the Deputy Chief of Mission (DCM) under Ambassador Mark Palmer. During an oral history interview[6] following the aforementioned con-

3 Magyar Napló Kiadó Budapest, 2021.

4 Magyar Napló Kiadó Budapest, 2021.

5 Liberty Square, District 5, Budapest.

6 Deák, András Miklós: *Mindszenty bíboros az elbeszélt történelemben – Mindszenty bíboros követségi menedékének egyes vetületei az amerikai elbeszélt történelemben.* L'Harmattan Kiadó, Budapest, 2021.

ference, Kursch recounted the story which – upon learning of the twin volume project – he repeated in writing for András Deák. Kursch told him that the last U.S. liaison officer who maintained direct contact with the Cardinal was Clement Scerback (1922–2005). After Scerback's passing away, his widow, Wilma L. Scerback (1922–2022) showed Kursch a "log-book-like" document among her late husband's papers which appeared to be of significant historical value. Recognizing its importance, Kursch donated the *Duty Log* to the U.S. National Archives (NARA) where this treasure has been preserved ever since. In such a way, this archival source was later located by Father Ádám Somorjai and his research team who used it as a compass for their further studies.

Following Kursch's personal recollections, the volume includes a valuable scholarly essay by Tibor Zinner, entitled *"What We Had Barely Known, or What Used to BE Concealed..."*. This study serves as an ideal introduction to the *Duty Log* and the related sources, helpfully preparing the reader for the material ahead. Zinner explores who visited the Cardinal during his refuge, including both his family members and high-ranking church figures, such as Franz König, the Archbishop of Vienna. The essay also presents a more humanized portrayal of the Prince Primate, examining his daily religious practices and health issues, and places his experience within the broader context of the Cold War tensions and the Hungarian–American diplomatic relations.

Looking to the future of the Mindszenty "book family", one important question still remains: Will the *Magyar Napló* series continue to grow beyond its current four volumes? In the present author's view, a comprehensive treatment of the final year of the Cardinal's refuge (1971) is still required. Although this particular year had previously been covered in a bilingual edition – *His Eminence Files*, *American Embassy, Budapest. From Embassy Archives, 15 (1971)*[7] –, new research could offer significant additions and corrections. At the same time, there is also an opportunity to publish the original English-language archival documents in full rather than in summary or an excerpted form.

To whom, then, is *In Refuge*, this new and valuable source, most recommended? It will be of particular interest to readers and researchers focused on diplomatic history – especially those exploring Hungarian-American relations – and who wish to study the material in both languages. It is also well suited to those interested in the day-to-day operations of the U.S. diplomatic mission in Budapest during the Cold War. Most importantly, it is an essential reading for those seeking to understand the history of Cardinal Mindszenty's refuge from the perspective of American diplomats, through the lens of the original English language documentation.

Róbert Vendriczki

---

7 Published by METEM, Magyar Egyháztörténeti Enciklopédia Munkaközösség, Budapest, 2008.

Guidelines for Authors

Fórum Társadalomtudományi Szemle – Forum Social Sciences Review

GENERAL RULES

The Forum Social Sciences Review is the fifth annual Issue of the Fórum Társadalomtudományi Szemle (https://forumszemle.eu/) in English language. It publishes texts (studies, debates, conference reports, reviews, etc.) mainly on topics regarding Hungarians living in Slovakia.

The Author is required to keep in touch with the Editor, Barnabás Vajda; e-mail: vajdabb@gmail.com.

Regarding studies, a proper level of written English language is obligatory for the Author. Forum Social Sciences Review does not provide English translation, nevertheless it takes care of English proofreading. The Editor and the English language proofreader make corrections in the manuscript only in the most necessary extent. A manuscript that does not meet sufficient linguistic criterias, can be rejected by the Editor, regardless to its content.

The content of studies will undergo external peer review. The Author will be notified about the result of the review process: publish - publish after revision by the Author - reject.

Format and technical requirements

Manuscripts should be sent to the Editor's e-mail address in editable electronic format. Texts should be in Word format, charts in Excel, pictures and photos as .jpg. The Author should hand in a plain text (in technical terms) as simple as possible, with a minimum of formatting. It means that the Author should avoid complicated formatting solutions, or full-capital-letter names, or special types of letters, etc.

The deadline for sending in manuscripts is May 31.

Simultaneously with the Manuscript, the Author is obliged to send in an **Author's Personal Sheet**, inlc. Author's name, occupation, etc. as he/she wishes to publish them (*see below*).

Formal requirements for studies

Required standard typology:

- Times New Roman 12;
- line spacing: 1,0;
- text aligned left.

For footnotes:

- TNR 10;
- line spacing 1,0.

Studies have to contain the following items – in the following order:

- Author's name (first name, family name):
- Title of the study:
- Abstract in English which expresses the brief summary of the study:
- English Keywords: 4 to 8; words separated from each other with semicolon; endig with full stop.
- Other information that the Author wishes to publish, such as *identification of a project, Orcid-ID, WoS-ID*:

The structure of the text is marked with chapter titles, such as Introduction, Conclusions, etc. Chapter titles can be marked with numbers too (e.g. 1., 1.1., 1.1.1.).

As a general rule while quoting, use this orthography: ...as Kant says "....."

Reference to Literature

Bibliographical references (both direct citations as well as paraphrases) are written as intertextual references, i.e. a short-version bibliographical reference is inserted right into the main text in a bracket. The full-version of the bibliographical reference is listed at the end of the study in the Literature.

Example: (Huizinga 1976) or (Huizinga 1976: 115) or (Huizinga 1976: 14 -25). 1) or (see more in Simon 2014).

Listing a literature, both explicitly cited and/or implicitly applied, is optional for the Author, in the Literature (no:) chapter at the end of the study, in alphabetical order.

Reference to books, monographs:

1. Authors's full name (family name [*comma*], first name)
2. and year of publication.
3. Full title of the book or monograph (*in Italic*).
4. Place of publication,
5. and name of the publishing house.

Example: Huizinga, Johan 1976. *A középkor alkonya*. Budapest, Európa.

If the Hungarian title is translated, then: Huizinga, Johan 1976. Egy korszak vége *(The End of an Epoch)*. Budapest, Európa.

Reference to studies or other texts published in collective works:

1. Authors's full name (family name [comma], first name)
2. and year of publication.
3. Full title of the study or other text.
4. In:
5. Name of editor of the collective work (family name [*comma*], first name)
6. (szerk.) or (ed.) or (eds.):
7. Full title of the collective work (*in Italic*).
8. Place of publication,
9. name of publishing house,
10. and page range (17–19).

Example: Hajnal, István 1986. Mikor érünk Európába? In: Ring, Éva (szerk.): *Helyünk Európában. Nézetek és koncepciók a 20. századi Magyarországon*. Budapest, Magvető, 624–645.

Reference to journals, magazines:

1. Authors's full name (family name [*comma*], first name)
2. and year of publication.
3. Title of the text.
4. Title of the journal or magazine (*in Italic*),
5. Volume,
6. Issue number,
7. and page range (17–19).

Example: Pašiaková, Jaroslava 1992. Kassák és a Bauhaus. *Irodalmi Szemle*, 35. évf. 7. sz. 692.

Footnotes

Archival and press sources are referred to in a form of footnotes. It means that in the text a numbered upper index ('Insert footnotes') refers to the detailed footnote text elaborated at the bottom of the same page.

Example: Slovenský národný archív v Bratislave (SNA v BA), fond Ministerstvo školstva a národnej osvety (MŠaNO), 1939-1945, kartón (k.) 52., dokumentu Nariadenie ministerstva školstva zo dňa 12.4.1941.

As a general rule while referring to a press source, use Hungarian orthography: *Prágai Magyar Hírlap*, 1935. június 5., 6. old. Or: *The Observer*, 1935. 5. 17, 1935, 27-29.

Online references are referred to in a form of footnotes ('Insert footnotes'). Date of access should be marked:

(www.xxxxxxx.ca; last accessed 2021.04.19.)

Pictures and charts

Each **Table, Chart, Photo** should be given a title. The place of tables, charts and photos should be clearly marked in the text, but they must NOT be inserted into the text. It means that charts and photos should be attached to the Manuscript in separate files.

Example: (in the text) Table 1: National minorities in Hungary between 1880 and 1910.

ANNOUNCEMENT

Dear Authors

the **Forum Social Sciences Review** welcomes original manuscripts of high quality in English language.

We publish texts regarding mainly Hungarians living in Slovakia but also welcome studies, debates, conference reports, book reviews, etc. from other fields of Social Sciences.

For more details, please check the *Guidelines for Authors* section in the Issue.

The deadline for sending in manuscripts is **May 31** in each year.

Send your manuscripts or questions to the Editor, Barnabás Vajda vie e-mail: vajdabb@gmail.com.

AUTHORS OF THE ISSUE

Csanda, Gábor: Literary historian, editor. Forum Minority Research Institute, Šamorín, Slovakia (gabor.csanda@forum-inst.sk)

Fedinec, Csilla: Historian, editor, senior research fellow. ELTE Centre for Social Sciences, Budapest, Hungary. ORCID 0000-0002-9156-9002 (fedinec.csilla@tk.elte.hu)

Gaučík, Štefan: Historian, senior research fellow. Institute of History Slovak Academy of Sciences, Department of the History of the 19th Century, Bratislava, Slovakia (stefan.gaucik@savba.sk)

Hopka, Zoltán: PhD. student. History Department Faculty of Education J. Selye University, Komárno, Slovakia (hopka.zoltan@student.ujs.sk)

Kojanitz, László: Researcher and senior editor at the Office of Education of Hungary, and Member of the Board of the Hungarian Historical Society Teacher Division, Budapest, Hungary (kojanitzl@gmail.com)

Kontra, Miklós: Linguist, professor emeritus. Károli Gáspár University, Budapest, Hungary (kontram@gmail.com)

Lampl, Zsuzsanna: Sociologist, publicist, writer. Constantine The Philosopher University in Nitra, Slovakia; Forum Minority Research Institute, Šamorín, Slovakia (moki.lampl@gmail.com)

Mikula, Zsolt: PhD. candidate. Eötvös Lóránd University, Doctoral School of Sociology, Budapest, Hungary (mikula@student.elte.hu)

Simon, Attila: Historian. Director of the Forum Minority Research Institute, Šamorín, Slovakia (simonattt66@gmail.com)

Vajda, Barnabás: Historian, history didactician. History Department Faculty of Education J. Selye University, Kománo, Slovakia (vajdabb@gmail.com)

Vendriczki, Róbert: Teacher. Károly Róbert Technicum of the Hungarian Maltese Charity Service, Gyöngyös, Hungary (vendriczki177@gmail.com)