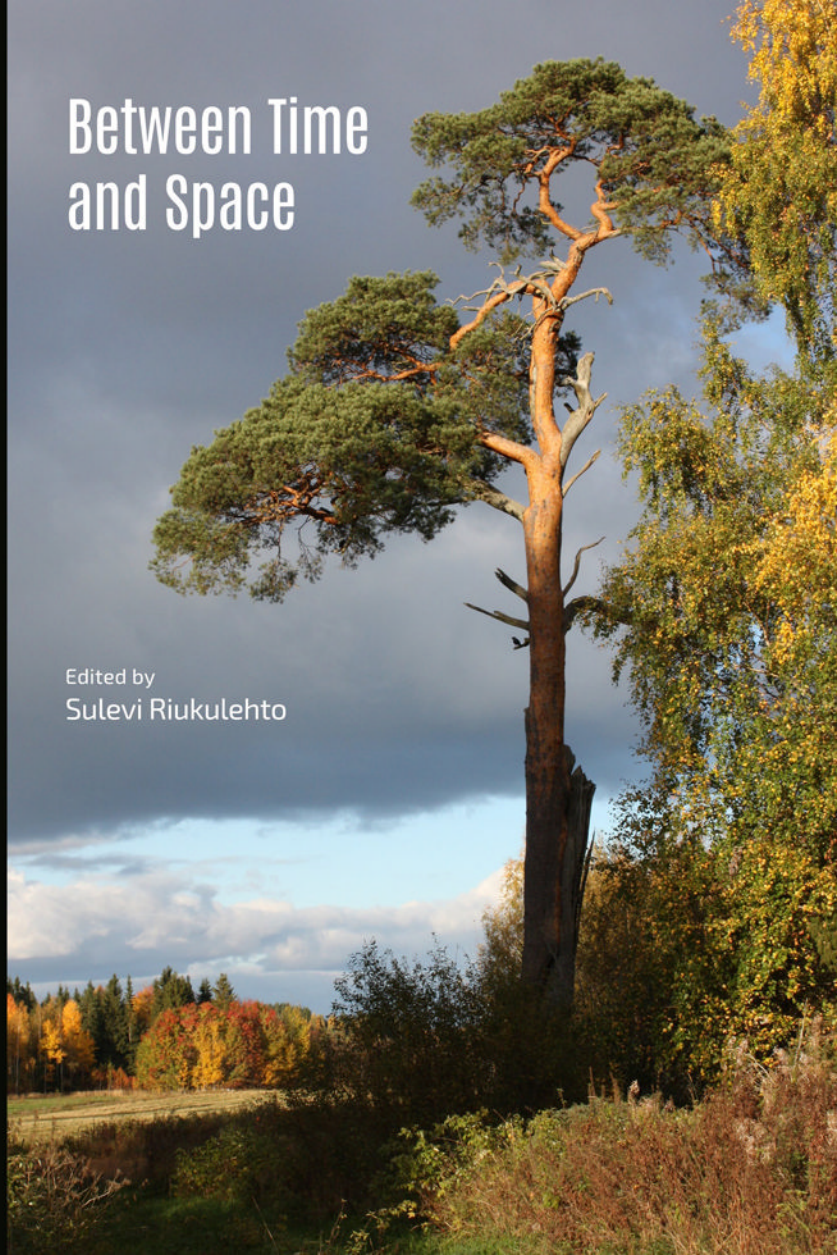# Between Time and Space

Edited by

Sulevi Riukulehto

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TABLE OF CONTENTS

LIST OF ILLUSTRATIONS

LIST OF TABLES

PREFACE

Over the past 15 years, a growing number of scholars in the humanities and social sciences have turned their attention to space as a means of understanding historical processes. Perhaps this is also a part of what has been called the cultural turn. The temporality of space and the spatiality of time are crucial to the ideas behind the various discourses of cultural heritage, narrations and of collective memory. These themes have successfully spread among historians, geographers and architects alike (Diaz Viana 2013, 91–113; Sanabria 2011; Rincón 2010; Lorenz 2012; 36–43; Ortiz García 2008). Conferences have been arranged specifically concerning the meaning of space, and special sessions of regional history have been included as part of larger conferences. Also this book was born as the result of the work done in two international meetings: the gathering of historians, regional scientists and geographers at the RSA European Conference of 2013 in Tampere, Finland and the RSA World Conference of 2014 in Fortaleza, Brazil. In addition, one of the chapters – written by Krzywoszyński – is based on ideas originally presented in the ISSEI World Conference 2012 in Nicosia, Cyprus.

The overall theme for all the cases in this book is the interface between time and space. We are interested in phenomena in which both time and space are equally relevant. Sulevi Riukulehto's review of the variation in works written under the heading of regional history serves as an introduction to the theme. In Chapter One he identifies five different ways of defining regional history. Some of them already have been traditions for centuries, such as the Central European *Landesgeschichte* in which old principalities or potential states are seen as subjects of regional history. More recently, however, many historians have moved their attention from the old administrative bodies (such as principalities) to less institutionalized regional formations. Then regional history is situated somewhere between the local and national levels. Also cross-border and cross-cultural areas as well as entirely artificial areas have served as bases for the regional-history point of view. The territorial area thus covered is not necessarily small: a history of an international macro-region may cover half a continent – or even more.

In the diversity of regional histories, Riukulehto finds some overarching features that will also be present in the case studies of the later

chapters. In regional history national states do not have a special role; regions are understood as evolutionary processes in which time and space – history and region – are connected in research questions. There also are some commonly popular subjects of research: borders, the roles of minorities and otherness.

The whole world will be toured in this book in order to further illustrate the entanglement of time and space. The first example comes from Central Europe. In Chapter Two Michal Semian deals with the historical regional discourse and context. He analyses three different regions in Czechia, discussing the influence of historical events and changes on the reproduction of these regions. He states that a region as a social construct and the existence of a regional identity are two of the most critical aspects of the existence of a region. Conceptualizing a region in this way enables him to go beyond the traditional static paradigm, and it makes the region a subject of study in historical geography where the region is no longer a mere object or a category. Semian's chapter is a part of the mosaic of ongoing research projects focusing on the conceptualization of "geosocial regionalization". Here we have an example of the interesting expansion of the discussion when both time and space are equally taken into attention. Neither geography nor history can alone completely fulfill the research needs arising from Semian's topic. In the conclusion of the chapter, modern Czech history is periodized according to geosocial influences. Furthermore, the importance of natural, landscape and administrative features to the reproduction of region is stressed, and related research on the perception of the region by its inhabitants in the future is suggested.

The space of the eminent and historically rich West Wits Line gold mining region in the West Rand of South Africa is explored in Chapter Three. Elize S. Van Eeden's special challenge is how to operate within a regional-history framework with the broad theme of ecohealth and wellbeing. The approach to regional history will also be weighed against recent international trends regarding the understanding of region and place and the doing of regional history in an early 21st century context. Van Eeden's contribution also belongs to a larger multidisciplinary project in which regional history only forms one part. Her research team follows a methodology coined as Integrative Multidisciplinary (IMD) research, which is also introduced in Chapter Three. We see that historians should not and cannot play alone.

In the fourth chapter Mark Davey documents the history of governance and planning in New Zealand's largest city-region, Auckland, from the 1840s up until the wholesale reform of 2010 when governance in the

region was unified into one "super-city". In doing so, this documentation illustrates how inter-organizational rivalry between local authorities, born from ad hoc governance arrangements, can have a crippling effect on regional planning endeavors, aspirations for regionalism and, most importantly, on a region's development. According to Davey, the future success or failure of city-regions relies, in part, on their management and the architecture of the institutional and administrative structures which govern them. Again, both time and space matter.

William Ricardo Marquezin and Adriano Rodrigues Figueiredo focus their eyes on the most recent economic history of the State of Mato Grosso in Brazil. Due to its socioeconomic heterogeneity, the region has perpetuated municipal economic inequalities that have their roots in history. As economists, Marquezin and Figueiredo approach their subject quantitatively with econometric instruments. They investigate how intergovernmental transfer policies, with an emphasis on the Municipalities' Participation Fund (MPF) and the quota share of the Goods and Services Tax (GST) of each city, contributed to the growth of per capita GDP between the years 2001 and 2010. In the methodology, Exploratory Spatial Data Analysis (ESDA) was used. The municipalities' participation fund was shown to be not significant, indicating that the Municipalities' Participation Fund did not have a favorable impact on the real per capita growth of these municipalities. The per capita GDP growth of the municipalities was explained by the distribution of the per capita GST. It sharpened regional income disparity, proving to be ineffective, which also suggests the necessity of rethinking the redistributive criteria in favor of less favored regions.

Otherness as a popular research subject is in focus in Chapter Six. Przemysław Krzywoszyński brings us back to Europe, presenting the image of "others" in some examples of post-Napoleonic romantic operas. Exotic civilizations fascinated composers of staged works, especially in the 18th-century French court; the most characteristic work concerning "other" civilizations was the opéra-ballet *Les Indes galantes*. In the time of colonial conquests and independence movements, the conflict of civilizations and the image of confrontations between them became a very important theme in librettos and in musical forms of the time. Regional identities were manifested in a cultural form. The characters and local communities in these works were described by means of interesting musical techniques and fine artistic effects. The composers created dramas in which conflicts between communities were, on the one hand, a good background for the dramatic plot; on the other hand, the artists were able

to express their personal political support for independent movements and use such a work as an analogy for contemporary events.

In the final chapter Sulevi Riukulehto and Katja Rinne-Koski introduce how history and geography link others seamlessly on the personal level in historical consciousness. Riukulehto and Rinne-Koski study conceptions of home in its broader meaning of *Heimat*, as a question of belonging to somewhere. How do the inhabitants of the Lake Kuortane area, in Finland, see their home? What are the key factors and deeper structures of their home in historical and geographical perspectives? Riukulehto's experiential theory of home serves as a theoretical framework for the chapter. It provides that every person has a specific, unique perception of home that has been built and is continually being built from experiences. The perception of home is revealed in personal memories and in homey landscapes. These are interpretations of important places (geographical interpretation) and events (historical interpretation). Thus, home is a personal relation to both history and geography at the same time. In short, home as *Heimat* means the totality of the things among which an individual feels at home.

CHAPTER ONE

REGIONAL HISTORY
BETWEEN TIME AND SPACE

SULEVI RIUKULEHTO

A branch such as regional history does not yet really exist in the family of human sciences. But it should exist. Regional vision would be highly useful in historical analysis in a world where national borders are inexorably losing their importance. The fact that regions remain important is not a new finding. John Dewey reasoned in *Dial* in 1920: "the locality is the only universal" (cited in Hurt 2001, 176). Dewey's statement is still valid – or more valid than ever – in our global world of localities.

History has traditionally focused on national characteristics. Specifically, attention has been paid to national history and to those events thought to have particular national significance. Historians have assumed that they were serving in a national mission – and honestly: this attitude has often gone so far as to result in writings of pure indoctrination. Historians have taught people something about their national identity, their national situation and particularity. In some countries historical sciences are still divided into national and general history. This is the case, for example, in Finland. Of course, many disciplinary branches of history have developed and strengthened during the 19th century, including economic and social history, and the history of ideas. Interestingly, the same kind of separation between national and general has not been made in other sciences: specialization in national biology or national physics, for example, sounds ludicrous. Strict differentiation has not been made even in all national sciences. Finnish language and literature are studied in Finland but certainly there is no branch of Finnish economics, or Finnish anthropology. Historians are exceptions. They seem to have – or perhaps they have simply undertaken – a specific national mission. This is not a Nordic phenomenon, only.

The big names among American historians have often had a strong emphasis on Americanism: events have been explained in terms of

westward expansion, manifest destiny, and in its continuation as the Americanization of Hawaii, Western Samoa, the Philippines, and further across the world (Turner 2008). In the history of ideas, historians have talked about the American mind (Commager 1950, Persons 1958). The basic thesis of the school is that Americanism was not imported from Europe. It was born in the new world. There surely are notable exceptions but, I am quite convinced, the mainstream of French historians has focused on the history of France. They have created French local history and micro-historical research. They have enquired after the French mentality and French identity – and they have found them, too (Braudel 1986/1990; Le Roy Ladurie 2001).

There is no more need for further examples in this introduction. It suffices to note that history has often had and still maintains a strong national emphasis (Isern and Shepard 2006). Naturally there also exist other kinds of historical works as well. I do not state that historians have always and everywhere been moved by national pathos, but I do maintain that the national angle of vision has been all too encompassing. War histories written in two countries with the same available sources have often led to entirely different interpretations. Sometimes it is hard to believe that it really is the same war in question. There are many reasons for this. Sometimes the sources have led a researcher: the sources have easily been restricted nationally though the object of research is spreading cross the border. This causes bias. Or perhaps the historian has been led along certain lines of thought on purpose. The national level has been chosen because it has been demanded. Also the research tradition may have captured a historian. Researchers have been guilty of a kind of myopia when they wish to join the common discourse with their colleagues. It is seductive and usually even functional. Who wants to be a loner? Again, it is important to remember that by the same token, other kinds of histories have surely been done.

The need for a regional view in history

Time, event, and narrative are basic concepts in history, whereby space, place, and landscape are basic concepts in geography. These two conceptual baskets obviously correspond with each other. The relations between the concepts are quite parallel. Event is a specific, meaningful point in time just like place can be seen as a meaningful point in space. Moreover, history – as a narrative – is an interpretation of time, either personal or collective, just like landscape can be seen as an interpretation of space (about the basic concepts in geography: Tuan 1977/2011, 3–7).

The two baskets are fascinatingly parallel. Both have created large research traditions – history and geography are seen as frame sciences. Researchers of whatever branch usually take one or the other basket as the frame of their research work. Unfortunately the two traditions are often quite separated and operate independently. Historians and geographers could discuss more with each other. And I (although a historian) have to admit that geographers have usually been more interested in time than historians in space. It seems to me that historians have been all too interested in asking what, when and who, and all too lazy in asking where, on what area, and in what direction. All these points of views together would give a fuller understanding also to such deeper questions like why, and with what influences and results? Both time and space matter.

Historians usually take the regional borders for granted. Often they anachronistically project current political boundaries back in time (Binnema 2006, 17). The research area follows the national border or some specific part of it. If the chosen administrative region changes, then so, too, will the historians' research area likewise change. The exploration stops at the border. If a smaller unit is taken under consideration it usually is a politico-administrative part, such as a municipality or county. If a larger area is under analysis, historians will operate on the country level. If national borders are crossed, the study will follow a multiple of national states. Formations of regions, that is, other than administrative levels, have all too often been neglected. But, in reality, phenomena do not stop at the administrative borders (Jordan-Bychkow 2006, 107) General history has the same kind of tendency. The states play central roles in political history: the states make wars and find allies; they secure business relations, they compete in trade as well as in sport competitions. This is made visible in cartography. In political maps, the administrative state jumps out clearly, because it is presented in gaudy colors and strict borderlines. When a border is changed, one color is magically exchanged for another. This is simply imaginary. In reality we seldom have such sharp borders. The demarcation lines in nature, in the built environment, and in cultural phenomena are unclear and blurred.

Many artificial African borders were made as the result of colonial decisions. Indeed, the sphere of cultural and historical influence may, in fact, cross current borders (Pankhurst 1997). But the same kinds of demarcations can easily be found also elsewhere. The frontier between Mexico and the USA cuts violently across an old cultural area of the Pimeria Alta, thereby forming the states of Arizona, USA and Sonora, Mexico (Griffith 2011). This is not because of some cultural or natural

differences, but simply due to bellicose relations between Mexico and the United States.

> [A] unified regional culture spreads over all these political and bureaucratic divisions, split into nation sates, sovereign nations, and administrative jurisdictions, but uniting them into something else, something real, that we call the Pimería Alta (Griffith 2011, 113).

The borderline between the USA and Canada, furthermore, was created in the compromise of 1846. It runs westward from Lake Winnipeg. Everybody understands that the plumb line on the prairie is not a real frontier[1]. It divided the settlements of Oregon. It crudely separated the Indian tribes and metis groups of habitation in the area. It is not a natural geographic border, nor geologic, climatic, linguistic, nor even an ethnic border. No cultural phenomenon follows the 49th parallel. It is entirely a political demarcation. But it has deeply separated Canadian and American historiographies from each other. Both have had interests in their own national history. Neither has given enough attention to cross-border phenomena.

Regional history touches upon these obscured points in traditional historiography. The attention may fall upon cross-national, comparative and borderland histories. Finally, after several decades of the linguistic turn, historians and other history-oriented scholars have deliberately begun using such terms as "region", "space" and "territory" in the context of history. In Europe the rise in importance of regional history and identities may be linked to current efforts at decentralization and regionalization in the European Union, the Europe of Regions (Johansson 1999, 27). But this interest is increasing all over the world. Historians have found various forms of expression for their regional endeavors. Cross-national histories explore the similarities and differences of historical development in two countries. Comparative historians attempt to compare aspects of the countries, borderland histories are those studies that examine the historical significance of the international borders upon the people who lived near such borders. (Binnema 2006, 35–36)

Perhaps it is too early to talk about a new movement, a turn to space, or a spatial turn in history. But new spatial connections can clearly be seen in various forms of history from below, such as the traditions of local history, micro-history and family history. It is an essential part of narrative history and the places of memory (the famous *lieux de memoire* de Pierre Nora 1983–1992) In all these historiographical directions, the role of space must have been taken carefully into account. The specific features of the place – the forum where history is made – may be decisive to historical

analysis. A regional point of view could have much to give in such historiography.

The spatial turn also has connections to the general globalization analysis and the wave of regionalism in the world. The regionalist paradigm is stressing the importance of place in explaining success and failure and the need for endogenous growth strategies (Hise 2009; Klieman 2008; Frisvoll and Rye 2009; Gerber and Gibson 2009). Reflections of regionalism can be seen in policy targets and in programmatic strategies. They are lightly visible in the EU programs of the period 2014–2020 (See for example Horizon, Interreg and Leader programs). The listings of World Heritage and Intangible Cultural Heritage, made by UNESCO, are obvious examples of worldwide political interest in the interface between time and space (Heslon 2008, 24).

The current turn may still have connections to the arrival of institutional and evolutionary drifts in economics; the adherents of new institutionalism are interested in the implications of all kinds of institutional changes in the economy, including the institutions established on a spatial basis (Keating 2007, 158). Again, regional history could be a useful resource in analyzing the interaction on the global and regional levels.
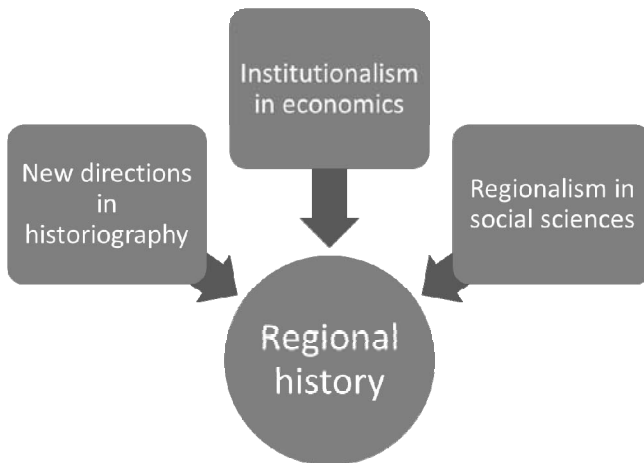
Figure 1-1. Regional history has connections to various trends in history, economics and social sciences.

New Institutional Economics follows the long tradition of the institutional approach when it underlines the importance of "good institutions" in the development process of a region. In economics, authors from Thorstein

Veblen to Gunnar Myrdal emphasized the role of institutions when they studied the politico-economic development of a region. However, the use of institutions in the historical analysis of development remains far from unproblematic. How do we identify the most crucial institutions and their role in historical contexts? How do we dismantle – how do we get rid of – the myopia of the present? Is it possible at all to artificially create – or even to enhance – good institutions? If not, why bother to discover them?

It is logical to interpret regions as institutions, too. These kinds of efforts have been made in many social sciences. If regions are institutions, they have the same features of evolutionary change and institutional rigidity that characterize all institutions. Thus from a regional historian's point of view the institutional framework is acceptable but it has some evident weaknesses, as well.

The evolutionary complexity of institutions is hard to handle and express analytically. More problems will emerge if we understand the regions as processes that are overlapping each other. Regions are both rigid and evolutionary at the same time.

The first requirement for good regional analysis is that we should operate with correct regional units. The top-down regional definitions that are in favor among historians too often remain fictive projections. In historical analysis this is a big problem. At its worst the history is profoundly misinterpreted. Or the other way round: the false regional units are violently kept alive in statistics, and the current administration may operate with regions that do not exist outside the maps of planners.

Old institutional reasoning of regions

Institutional inertia or rigidity was one of the main elements in the doctrine of the old institutional school. Institutions are always formed throughout history, shaped by previous generations. So, in a way, they are always out of date. Economist Thorstein Veblen labelled institutions as featuring delay, friction, and leaks (Veblen 1909/1961, 240–245). Institutions are dangerously lagging behind the technical development. They always resist changes. They are reluctant to come to terms with new ideas. They do not smoothly support reforms. This fact has both good and sides to it. New innovations are most easily been adopted where institutions are young. Regions with old institutions have to pay "the penalty for taking the lead" (Veblen 1915, 224–228).

The idea of rigidity was further developed by William Ogburn in the 1920s. He saw "cultural lag" as the joint effect of all institutional impact in cultures.

> The thesis is that various parts of modern culture are not changing at the
> same rate, some parts are changing much more rapidly than others […]
> Where one part of culture changes first, through some discovery or
> invention […] there frequently is a delay in the changes occasioned in the
> dependent part of the culture (Ogburn 1922/1966, 200–201).

Again, Swedish institutional economist Gunnar Myrdal was grappling
with the same problem of rigidity in his largest work *Asian Drama* in the
1960s. The new economic practices and ideas could not flourish in South
Asia because of such delaying, ancient institutions as the caste system. At
the same time, the basic nature of institutions made it really hard to
artificially create new, useful institutions. And it also made it difficult to
borrow them from the Western World.
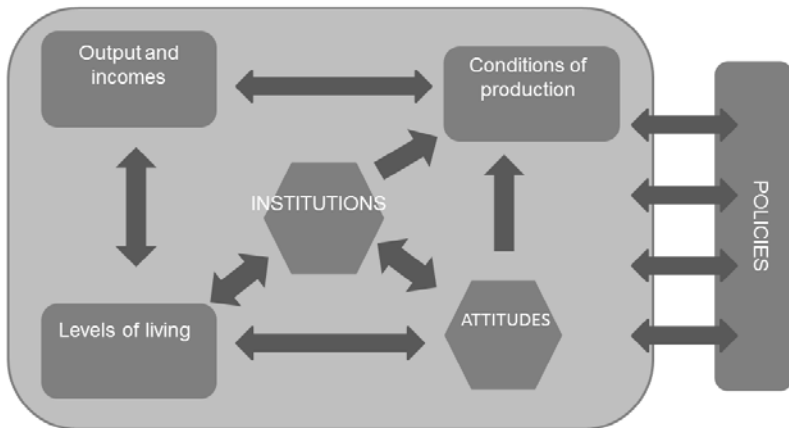
Figure 1-2. The conditions of development in Myrdal's evolutionary model

In a way, the idea of path dependency can be found in Myrdal's analysis:
Each region has unique socio-economic conditions. The western success
story of development should not be supposed to be repeatable everywhere
– if anywhere. Policies create institutions and attitudes and the other way
round (Myrdal 1968, 1859–1871). All the alternatives are either not
available or cannot be chosen at any one time.

In his model Myrdal differentiates six categories of conditions (output
and incomes, conditions of production, levels of living, attitudes,
institutions and policies). A change in one condition will tend to change
others in the same direction (Figure 1-2). Myrdal's model as pictured
above is only an illustrative example of the evolutionary tools that

institutionalists have tried to develop to better catch the procedural nature of socio-economic phenomena.

The institutional framework is acceptable but it has some evident weaknesses. The evolutionary complexity of institutions is hard to handle and analytically express. Myrdal's own masterpieces are illustrative: it took some 2,000 pages for him to describe the situation in South Asia.

We can learn a lot from the works of old institutional economists but their institutional framework is far from perfect. They noticed that the regions are not the same everywhere. However, they did not identify the problem of defining the regional units. Myrdal, like others, took the concept of region for granted, and this, I think, is the problem. It stands in contradiction with old institutional conceptions. Regions are rigid but certainly evolutionary at the same time. In order to get a better picture of different regional phenomena over time, we should not operate with fixed units. Regions defined from the top down do not match up with historical reality. What is a correct contemporary representation of the regional structure may fade into a fictive projection in the context of historical data.

Regions as institutions

In the recent works of cultural geography and regional history, regions in themselves have also been understood as having an institutional nature. This makes the general view of reality even more complicated. Olivier Nay concludes his study of regions as institutions in the finding that a region, when institutionalized, is not the sum of its sub-regional interests but something more (Nay 1997, 320).

According to Finnish cultural geographer Anssi Paasi, regions are formed in quadripartite institutionalization processes (Paasi 2002, 140). All regions have

1. territorial space,
2. symbolic manifestation,
3. regional organizations, and
4. identity or consciousness of a region.

In Paasi's model the region is institutionalized precisely in this order: forming regional borders is the first phase and regional identity is the last one.

The same interest in regional institutionalization processes can be found in other contemporary discourses, as well. The spatial turn is manifested in the ideas on the new regional history that is challenging the

traditional economic history of regions (e.g. Lancaster et al. 2007). They claim that instead of realities being defined in an a priori manner, set once and for all in history, regions should be understood as evolutionary processes. Basically, in reality, a region cannot be created by a governmental act. It cannot flow top down from the national government. The substantial legitimacy for the existence of a region is first caught by its inhabitants and secondly by the outsiders. The human factors form regional institutions, regional identity, and regions as well.

Regional space can always be characterized by its physical nature, but regions as historical units are never completely determined by their environment. The human factor shapes institutionalized spaces with little reference to geographical context. In such a social process the region is created. Only because the region is a social creation does it always have a history. The mere environment could not have but a natural history. A region's identity, too, depends on human memory – on historical consciousness. Without the human factor a region can have an identity only in the pale meaning of sameness (Ricoeur 2000, 98–128; Riukulehto 2013, 41–45; Piwnica 2014, 18; 129–132).

Forming a region is an evolutionary process. The edges of regions bleed across their boundaries into their neighbors' territories. The regions are socially interdependent. Areas of immediate belonging and familiarity are surrounded by labile zones (Phythian-Adams 2007, 7). It is in such a context that regional institutions emerge from amidst such interaction. Sometimes the formal boundaries divide rather than delimit the continuous areas. So, regions should be seen as constantly ongoing creations of individual and institutional choices, constantly reforming themselves anew. A region is a process and the process is both chronological and evolutionary in nature, that is, a process over time, but one that also simultaneously undergoes spatial change.

However, the great majority of all economic history writing is still grounded on the ideal of the durability of regional structures. The focus is on the nation state or on some sub-division defined nationally. The prevailing vision of a state is a teleological one. The state is still seen as the final target of development history. The same Hegelian teleology has dominated history, economics and political science for two hundred years. History has composed the national history of nation states, written by national historians, just like economic history is dominated by national economists. There have been unorthodox authors, such as the above-mentioned American institutional school manifesting an evolutionary vision in economics. But their voices have been weak and almost

disappeared in Europe before the emergence of new institutional economics and new regionalism at the end of the 20th century.

The authors of the *Agenda for Regional History*, Charles Phythian-Adams and Bill Lancaster, list some crucial criteria for a region. Phythian-Adams starts his definition at the socio-cultural level. He gives us seven key features for defining a regional society:

1. concentration of population;
2. hierarchical structure;
3. intra-dependence of the region;
4. self-identifying;
5. a region's provincial interests against those of national power structures;
6. a demographic concentration (of indigenous families); and
7. a regional sense of belonging together (Phythian-Adams 2007, 8–9).

In addition, Bill Lancaster's list consists of purely socio-cultural factors: space, language, culture, economy, political movements, traditions, and relationships to the nation state (Lancaster 2007, 24). It seems obvious to me that both sets of criteria lead to an evolutionary interpretation of a region. Both authors have listed relevant factors, but the listings are not complete. In addition, other criteria could be made use of in defining a region (like: shared history, religious and intellectual movements etc.)

Another example of the spatial turn in social sciences can be found in the field of political science. Regions and territories have acquired a new focus on the discourse of new regionalism. Specific attention is also given to the definition of a region. Compared to Paasi or to Phythian-Adams, the Spanish political scientist Desiderio Fernández Manjón comes from an entirely different scholarly tradition. His analysis is based merely on José Ortega y Gasset's idea of *circunstancialidad*, that is, a human being is defined by his or her circumstances. Fernández Manjón's criteria of a region include (Fernández Manjón 2010, 68–69):

1. borders;
2. landscape;
3. language;
4. group solidarity; and
5. administrative autonomy.

In spite of differences in their backgrounds Paasi's ja Fernández Manjón's criteria are quite similar. Obviously, territorial space and borders are

different facets of the same phenomenon. Also group solidarity and identity belong together, and autonomy sounds something like organization to me. Paasi's symbolic manifestations (such as monuments) are part of Fernández Manjón's landscape (Fernández Manjón 2010, 25).

The idea of seeing a region as an institution has deep roots in the works of such authors as Paul Vidal de La Blache and Fernand Braudel. Both of them listed the main features of regions long before the rise of theories, such as those mentioned above. The main idea in Vidalian human geography is that any region – such as we see it – is drastically shaped by human intervention (Vidal de La Blache 1903/1994, 26). Geography is a huge history book, the result of ongoing human intervention and action.

Vidal had a great impact on Lucian Febvre and both of them on Fernand Braudel's vision of history. In his last work, *L'identité de la France*, Braudel repeated his famous theory of three kinds of historical changes (events, conjunctures and structures), now specifically connected to regions in history. Besides historical events, historians should also be interested in the slower alteration of conjunctures and the rigid (or almost solid) evolution of structures (Braudel 1986/1990, 15–16; 1958/1969, 44–56).

Regions seem to change their form and nature very slowly, but unavoidably. In Braudel's terminology they certainly are structures. Any administrative boundary and any political frontier, once marked out, has a tendency to persist and become fixed for all time. Braudel gives us plenty of examples, from the Treaty of Verdun to colonial Africa and to the Conference of Yalta, thus repeating the Veblenian (institutional) or Vidalian (human geographic) findings of the rigidity of regions (Braudel 1986/1990, 314–321).

We can easily find more recent examples: German reunification in 1990 ushered in a new era for that once-divided country: the five new *Bundesländer* were no longer forbidden to invoke regional deep structures. The eastern populations desired to escape their East-German label. Individuals refer to their identity as being anchored to specific region. The presence of old regional deep structures is thereby attached to the cultural-historical realm. But, the quarter-century closure of borders has a certain efficacy as well. It has provoked an approximately 2–3 percent difference between the East and West German vocabularies (Lindeborg 1999, 94–97; Fernández Manjón 2010, 72). The differentiation between westerners and easterners will probably persist for decades to come.
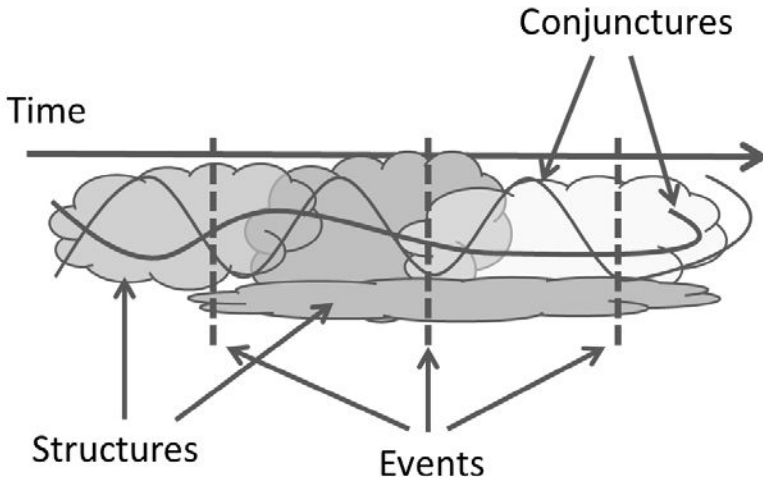
Figure 1-3. Events, conjunctures and structures in history

The space matters

International networks have grown increasingly complex. They are requiring units of administration that connect with economic and social reality. New non-governmental agencies and institutions have emerged. In this context it is only natural to ask also after a new regional vision of history, a history that exceeds the national level of historiography, studying regions that are not necessarily nations or its administrative sub-divisions. Their form may vary; they may cross national borders. Finally, a nation is somehow understood as an exception of a region, a special case of a regional framework.

The new conditions have already changed our conceptions. Territories are no longer considered interchangeable. They have different histories. Markets, capitalism and entrepreneurial activity are not the same everywhere. They vary not only in time but from one place to another. The context of interregional competition is European and global – no longer national (Keating 2007, 158).

The new regionalism has made regions more visible. The people have always identified themselves as inhabitants of a certain region, so they have a sense of where they belong. But how visible these regions are, either culturally or economically, cannot easily be differentiated in national statistics. In Finland, for example, the most crucial regional

features – (*maakunta* in Finnish) – did not exist in national statistics at all before joining the European Economic Area (Kukawka 2001, 70–71). The administrative regions (provinces) were established in Finland in 1994. The national statistics had already been applied in following the new regional units two years earlier. Still, the operationalization of the regions (i.e. making the regions visible in historical data) is difficult because the existing indicators and historical statistics are, for the most part, created following only the administrative boundaries, not cultural-operational bases. Besides, the historical administrative borders are usually other than those of the modern provinces. The alternative possibility in defining regions is based on the cultural-operational unity of a territory. An area with a common cultural and operational basis can be seen as a coherent region, but collecting and counting statistics from the amoeba-like regions is an operationally hard puzzle to solve. How can one study a region that does not have stable, clearly defined boundaries?

The concept of a region in historiography

I next try to review a range of the manifold meanings of the concept "regional history" in literature.

If one types in the word-pair "regional history" into a search engine in order to find references, the display will not be filled with listings of books and articles in the tens of pages. Regional history is not an established branch of history. There are not plentiful numbers of international conferences, publication series, and academic chairs in regional history. Over the last twenty years the regional-history point of view has begun to command a place in research reports, projects, history books and other scientific outputs, insofar as half a meter of items can be found even in my own bookshelf. Thus far, the concept is still unestablished. The new regionally oriented directions in historiography are so recent that a generally recognized orthodoxy has yet to be adopted. The various elements from localism to globalization can still be seen. What is a region? There exist competing views concerning the definition and criteria. In this listing I try to make the various meanings of the concept more visible.

1. There are lively traditions of regional histories in Central Europe under the German label of *Landesgeschichte* and the history of *Heimat*.

Ancient Central European principalities have a flourishing tradition of regional histories that are commonly known by their German name *Landesgeschichte*.

Actually, the history of *Landesgeschichte* is longer than national historiography (Berdah et al. 2009; Řezník 2009). It extends beyond centuries. The ethno-territorial evolution in Europe was distinctive in the early Middle Ages (Tägil 1999; Lindeborg 1999, 64–72; Řezník et al. 2009, 59–60). The old principalities were once more or less independent with their own rulers, laws and cultural specialties. In present-day Germany there were, at the most, two hundred states, both in Italy and Austria several dozens. A similar system of miniature regional bodies reached the large area of Central and Southern Europe from the Baltic to the Mediterranean. A prosperous group of institutions have grown up on these regions. There are regional newspapers, annual books, museums, associations, and foundations. Some of the principalities now exist as part of current federations. A few have continuously maintained their independence as dwarf states (Monaco, San Marino). Still others have regained their independence after a long period of subsumption, or even for the first time (Montenegro, Croatia, Slovakia, Slovenia). Those who have lost their autonomy have still often maintained various regional institutions and plenty of specific characteristics.

The sense of belonging is also an important factor: these regions are felt homey. They are *Heimat* for their inhabitants (Blickle 2004, 1–9). Demarcation between *Landesgeschichte* and the history of *Heimat* is difficult and useless. Today both seem to be translated into English as regional history (E. g. Berdah et al. 2009, 39; Řezník 2009, 233; Gullberg 1999, 158–164). The German word *Heimat* and the French concept *son pays* are also made use of in English in this connection (Fox 2009, 5; Bozkurt 2009, 21–31; Morley 2000).

2. Many regional scientists define regions as a level between that of local and national. This conception has also been adopted by some regional historians.

This is a moderate interpretation of the concept. Regional history thus defined does not radically differ from the traditions of national historiography. Many historians who have specialized in a certain province or county found themselves to be missing from within the circle of regional history (Bucur and Costea 2009; Hoare 2009). Similarly the history of autonomous territories, such as the historiography of Catalonia or the Basque Provinces, can be interpreted as regional history. The difference from national history is not substantial.

3. Cross-border and cross-cultural areas serve an excellent basis for regional history.

European regionalism has given a new importance to the histories of areas. In the Europe of Regions much attention has been given to the areas that cross state borders, ethnological borders and linguistic borders. They merely talk about *new* regional history. Such phenomena as divided cities, European Euregions (e.g. *Oderraum*, the frontier area between Poland and Germany from the Baltic Sea to the Czech border), and the contemporary history of so-called potential states (e.g. Galicia) are under analysis, as well as the economic micro-regions inside cities and the identities in micro-regions (Řezník et al. 2009; Persson 1999, 212–249; Ira 2008).

A border can also have a mental nature. Also such themes as immigration and linguistic, ethnic and religious minorities have been studied under the label of regional history. Thus, in France, there are regional history books concerning European immigration, linguistic minorities and the Jewish Holocaust from a regional perspective (Genty 2009; Le Roy Ladurie 2001; Cabanel and Fijalkow 2011).

During the sixth framework programme the European Union funded quite a large humanistic research project, Cliohres. Altogether, 45 European universities participated in the research network. Special attention was given to borders and minorities. National borders are not the only frontiers to cross. Again, many regional historians are interested in invisible borders, such as sexual, professional, ethnic and linguistic (Pintescu 2008; Hofmann 2008; Betlii 2008). Some researchers have made a positive separation from the old *Landesgeschichte* tradition, in the sense that they merely talk about *new* regional history (Eβer and Ellis 2009).

4. Regional history may study artificial regions.

Some areas may never have had an historical identity, though they could be reasonably restricted by some research criteria. Such a region is the American Midwest, for instance. The Midwest lacks the kind of geographic, historical and cultural coherence that can be found in New England or in the American South. However, the topic of regional identity can be relevant here as well (Cayton and Gray 2001, 1).

Exemplifying cases can also be found in Europe. Regional scientists have paid attention to unusual regions, such as the Euro-Arctic Barents region in Northern Europe. As many as 146 such regions have been differentiated or named in Europe mostly by the influence of new regionalism (Lord 2006, 1853–1854). Furthermore, they can also be studied from an institutional and historical point of view.

5. An entirely different meaning for regional history has been developed in the research of international macro-regions.

Such phenomena as globalization and international business draw attention to the level of continents and free trade areas. This concept is commonly used by economic historians and globalization researchers. They may study large zones, such as Southeast Asia, Central Europe, Mercosur area in Latin America or European development corridors (e.g. a zone from Northern Italy to the Benelux-countries) (Acharya 2012; Tussie and Trucco 2010; Escuder and Iglesias 2010). The macro-regions may be artificial, or then perhaps not. In both cases, they could also be studied by regional historians.

Although the discourses presented above have different origins and although they have developed independently they also have much in common. They are not entirely separated but clustered just like concepts usually are. At least four features connect the different discourses of regional history:

1. National states do not have any special role in research work.
2. Regions are understood as evolutionary processes.
3. Time and space (history and region) are connected in research questions.
4. Borders, the roles of minorities and otherness are popular subjects of research.

An agenda for regional history?

I next take a deeper look into the various meanings of regional history exemplified by *An Agenda for Regional History*, a book edited by Bill Lancaster, Diana Newton and Natasha Vall (Newcastle 2007; henceforth the *Agenda*). It was the initial intention to collect different authors together under the label of regional history. It may serve as a window to the general view of conceptions concerning regions in current regional works of history.

The *Agenda* consists of 19 articles throwing light on regional history from different points of departure. I try to analyze the different conceptions that can be found in the articles by categorizing them through a number of dichotomies such as simple–complex, static–evolutionary and administrative–discursive. Certain aspects can better be examined through such manifold qualifications as *sub-national – supranational – cross-national* and *geographical – socio-cultural – economic*.

Some authors of the *Agenda* are pondering their definitions in detail, while others do not question the concept at all. Sometimes regional history is almost synonymous with local history (Saunders 2007; Jackson 2008). This is a little bit confusing to me. Why not use the term local history if this is what is meant? Clearly the great majority of the authors have a more specific idea of their concept of region; i.e. they make a difference between the concepts of local and regional.

There are differences in the criteria by which the regions are assorted. Naturally, a region may be differentiated on account of geographical details. An area may have such a peculiar geographical realization that it obviously differs from surrounding areas. In a way, this criterion is fundamental and sometimes it is even indisputable. Such is the case of Åland, an archipelago between Finland and Sweden. The mere geography gives Åland her peculiarity and uniqueness. In the *Agenda* the geographically oriented concept of a region can be seen in Brian K. Roberts's article of North Eastern England (Roberts 2007). He looks at geographical facts like climate, coastal profiles, forms of land and vegetation in order to define the region of Northeastern England in medieval and classical periods. Besides – interestingly – he makes use of the concept of positive and negative evidence, with a spatial distribution being reversed to ask about the negative spaces and what they mean. Do they form a region by virtue of omitting certain peculiar features?

Table 1-1. Profile fields for regions in history.

Criteria for identification:	Natural geographic	Socio-cultural
Form of manifestation:	Administrative	Discursive
Durability:	Static, fixed	Procedural, evolutionary
Complexity:	Simple	Complicated
Hierarchism:	Hierarchical	Non-hierarchical
Way of formation	Projected, dictated	Spontaneous, autonomous

Usually the mere natural geography is not enough. In fact, it is not enough for Roberts either. He goes on to social, cultural and economic factors. Charles Phythian-Adams starts his definition right from the socio-cultural level. So, Phythian-Adams gives us seven key features for defining a regional society, which were presented in the subchapter "Regions as institutions."

One is familiar with these kinds of inventories from another historical context. The theorists of a nation defined the same kinds of lists two hundred years ago in order to demonstrate the existence of a nation. The parallelism between a nation and a region is thus evident.

Some authors highlight especially the economic criteria. Of course, the economic distinctions can be included as part of socio-cultural criteria. Or, alternatively, the socio-cultural criteria could be further divided into three to five more criteria. However, we have a great number of economists who have studied regions and defined them merely on account of their economic parameters. In the traditions of regional economics it has been quite common to omit all factors external to the economy. I do not claim that all the regional economists would have been using criteria so tightly drawn, but there certainly are many of those who have.

What forms of manifestation does a region have? What is the place of administrative institutions in a region? Some authors are looking for administrative units with stable, regional institutions. In a way, they seem to think that the more institutions a territory has the more it is a region. This motivates A. C. Hepburn, for example, to concentrate on exceptional, "contested regions" like Ulster, Saarland, Punjab, Basque region, and Bengal (Hepburn 2007). They have a number of regional institutions, they may be nations and they are almost independent states.

Others maintain that a region – being a discursive phenomenon – can have an important influence on identities, although it was on the stage of an idea rather than that of geographical or social reality (Holford 2007). Cultural idioms reflect the spread of particular ideas. The spread is not necessarily uninterrupted and coextensive but sporadic (Phythian-Adams 2007). It can be easily seen that the administrative and discursive criteria lead to an entirely different map of regions.

A number of profiles can be differentiated if we combine the forms of manifestation with the main criteria: a region may be differentiated from its environment on account of its geographical, socio-cultural or economic features. Besides, a region may have its manifestation in administrative or in discursive form, or in both forms. These possible categories of conceptions can still be further refined. The concepts of region differ from each other concerning the complexity, durability and relation of regions to

other territorial formations, such as national states (to the last mentioned I have given the name hierarchism in Figure 4).

The complexity and durability of regional structures

The structure of a region can be either simple or complex. The geographically defined regions are often structurally simple. However, the majority of the authors confine regions as complex entities, whether they are defined by contours of the ground or by some discursive constructions (Walton 2007).

The geographical differences between regions are naturally almost permanent. In traditional historiography, however, all kinds of regions have been taken to be quite static. The regions have been defined once and for all in history. The statistical data is produced following certain static frontiers, usually projected backwards from the present tense. This makes history writing much easier but certainly not more reliable. In the *Agenda* the attitude is criticized by Michael Keating: economic, cultural, institutional and political integration do not necessarily coincide in time and place. Static analysis does violence to the procedural nature of regions (Keating 2007).

Most authors emphasize the evolutionary or procedural nature of a region. Regions are to a large extent historical constructs without permanent size and shape (Wilson 2007). There are geographical, political and religious grounds for regional identity. Region and regional identity are not a priori defined realities, but are constantly ongoing creations (Granier 2007). In a long-term perspective, at least, the process is evolutionary rather than episodic (Phythian-Adams 2007).

Regions and the nation state

Concerning the relation to the nation state, three kinds of attitudes can be differentiated: a region is seen as a sub-national, supranational or as a cross-national creation.

Usually, the regional is seen as a level in a hierarchy. Regions are parallel parts of the whole; they form one stage in a hierarchical continuum of territorial spaces. The idea is usually presented in a sub-national form (from bottom to top): local – sub-regional – regional – national – international. A region, thus, is defined as constituting the largest and most extensive intermediate collectivity between the individual and the nation state (Walton 2007). Many variations of the conception can easily be found (Gilli 2007; Russell 2007; Wilson 2007; Walton 2007; Holford 2007). So, in Patrick Gilli's article on Italian and Florentian

regional identity there is the Italian consciousness which is above the level of the state of Florence concerning the entire peninsula. There is a distinction between the Italian homeland and the little, local or regional homeland (*Heimat*), which was only a sub-unit of the former zone.

There certainly are many exceptions and anomalies such as semi-independent in-betweens, frontier areas, etc. Sometimes regions are regarded as kinds of embryos, potential future states, still politically ambivalent elements in the state formation process (Wilson 2007). According to this conception the regions are contingent, relatively short-lived, specialised sud-divisions of some wider plane of national activity. Alternatively a region is taken to be a more enduring, intermediating actor between localities and the nation (Phythian-Adams 2007). A region has an identity, a social memory, myths, institutions, and its own iconic buildings.

Some scholars become embarrassed when the searched for hierarchical structure is not to be found. Does it mean that England, for example, does not have regions (Holford 2007)? If a region is understood as a self-defined, spontaneous formation, independent from the hierarchy of localities and nations, the absolute difference between a regional and national consciousness disappears. A region has geographic, strategic, cultural, functional, and historic factors that may or may not follow national borders. A region is a local, a national or an in-between formation; it can even be international or cross-national in nature. In order to study regions, concepts like meaning, identity, history, territory, and power are more useful as a set of tools than the hierarchy of nation, region and place (Aronsson 2007). Again, the variation in the use of the concept is great.

According to this point of view there is no absolute difference between a regional and national consciousness. A state is a region with an army at its disposal (Hepburn 2007). In a way, the role of national history reduces to a special case of regional history. Cross-national regions can be recognized even if the inhabitants of a region do not necessarily regard themselves as a homogeneous group of people (Hepburn 2007). This also makes it possible to study a city as a region like Belchem does with Liverpool and Thompson with Berlin.

A completely different idea of region can be found in international economics. A region is a supranational share of states. This definition positions a region at the other end of the hierarchy. Regions are summed-up nations. They comprise international economic areas, such as South Asia, the European Union, etc. In the *Agenda*, however, no author leans toward this particular interpretation.

A frame for regional history

Many kinds of social, cultural, economic, operative, geographic and historical factors may be essential in forming a region. I would not give primacy to any factor among them.

It is easy to agree with Peter Aronsson and Dave Russell: We need a comprehensive theory of the use of history in the construction of identity (Aronsson 2007). We need far more historical geography of cultural activity, a mapping of networks that allows us to view more clearly the highly distinctive cultural regions that have emerged over the last centuries (Russell 2007). Maybe Miroslav Hroch has hit the mark: regional history may modify or even replace a collective identity based on national history (Hroch 2009, 2). Besides I am convinced that we also need more historical analysis of the development of operative and economical interaction between regions. In what directions have the actors of a certain area employed their social, cultural, economic, and functional operations?

In order to differentiate regional history from local history and national history, the regions should not be defined as divisions of states or as multiplications of localities. They should not be taken as a hierarchical unit between local and national. A region may be situated between them, but they are not indispensably situated there. A region should define itself autonomously. This means that neither the national nor local level should be given primacy in the historiography of any regional phenomena. Regions should not be taken as projections of the national level. A region is necessarily a procedural, evolutionary actor. It may be local or cross-local; it may be a state, a part of a state, or the entity of many states or their parts. A region may have different positions and statuses in different times. Regions are evolutionary, procedural and non-hierarchical actors.

This also means that a historian should be careful while using statistic data produced by national authors; they may reflect unnatural projections of regional structure. This kind of top-down bias, uncritically utilized, may lead to the secondary framing of questions and to false results in research work. Perhaps some interesting questions do not penetrate the analysis at all because the given regional division is irrelevant. Or perhaps the phenomenon simply cannot be seen from the data.

CHAPTER TWO

HISTORICAL ASPECTS AND INFLUENCES
OF THE REPRODUCTION
OF REGIONS IN CZECHIA[1]

MICHAL SEMIAN

The region has always been a fundamental phenomenon examined in geographical research. Over time, it came to be understood more or less as a static category that was used by a majority of scholars to sort data and information (Klemenčič 2005). Since the 1980s, attempts to redefine the region from a static category to a more dynamic phenomenon can be observed. This new paradigm sees the region as a social process (Pred 1984; Paasi 1986). Such a region might be delimitated according to relations in space (Allen et al. 1998). Therefore, this approach is sometimes called a "relational rethinking of region" (Johnson et al. 2011). This new understanding of region means that a region is variable in time; it can be formed and reproduced and disappear as well (Pred 1984; Paasi 1986; Raagmaa 2002; Zimmerbauer and Paasi 2013). Hence, the phenomenon of region has shifted from being the mere object of geographical studies to becoming a subject. Although this discussion is not new, many contemporary papers and scholars still see the region only as a category and locate it between the national and local scale levels according to context (Paasi 2004; Henderson 2009). This new understanding of region enables stepping over the issue of scale and facilitates the delimitation of regions across levels of scale (Paasi 2004). On the other hand, it does not mean the region cannot exist and be studied between these two levels of scale; simply stated, many regions meet the "size" criteria of this scale. It is important to accept the new understanding of region as a kind of guideline for how to study regions and how to think about the region in space and time. The phenomenon of periodization has a very similar position in contemporary historiography (Wishart 2004).

This chapter has background in a broader research project dealing with regions and their formation and reproduction and the possibility of delimitating regions based on regional identity and the inhabitants' sense of belonging. In these research activities, the region is viewed as a result of the process of the institutionalization of regions (Paasi 1986) that enables it to be studied by focusing on several phenomena, such as: borders, symbols, institutions, and identity. These phenomena are variable in time, as is the region itself, and, therefore, interesting for historical geographers. The link between region and identity is one of the leading themes of modern historical geography in the world as well as in Czechia (Graham and Nash 2000; Semotanová and Chromý 2012).

The main goal of this chapter is to contribute to the debate on the mechanisms of the formation and reproduction of regions, while stressing the importance of an historical approach. The study focuses on how regions with different conditions for reproduction have reacted to important historical events and changes. Another aim of the research is to periodize modern Czech history based on the formation and reproduction of region and regional identity. Historical discourse and contextual analyses of specific regions in Czechia have been conducted focusing on the main drivers of regional formation: tourism, regionalism and the new regionalism, and nature conservation and landscape protection. Following the regional discourse, the general idea of selected regions presented in literature is expressed. A better understanding of the history of regions and their formation is important for the study of the general mechanisms, factors, and aspects of the formation of regions and regional identity, as well as the actors involved. This might be useful for adjusting different regional development strategies (Semian and Chromý 2014) and of course for better delimitating regional development initiatives territorially. Finally, the study may contribute to setting regional marketing strategies more precisely, as the application of global models requires ever more local sensitivity.

The contemporary regional system in Czechia is the result of the long-term development of general and specific processes. The polarization of space (core – periphery) in the context of the general shift of society to the industrial, and later to post-industrial, era meant dynamic changes in regional structures. Therefore, this research is limited to the period starting in the mid-nineteenth century when the process of industrialization began to play an important role in general developments. The year 1850, when important reforms in the regional administrative system were made, was set as a milestone in the research. Besides just general processes, specific processes are also very important and are probably even more interesting

from the perspective of the development of regions and for understanding the mechanisms of regional formation and reproduction. The most important processes specific to Czechia include: the development of the regional administration system, transformations connected to ideological shifts (nationalist, communist, and post-communist), and the dualism of the Czech-German population in Czechia which ended with the resettlement of the Czech borderlands.
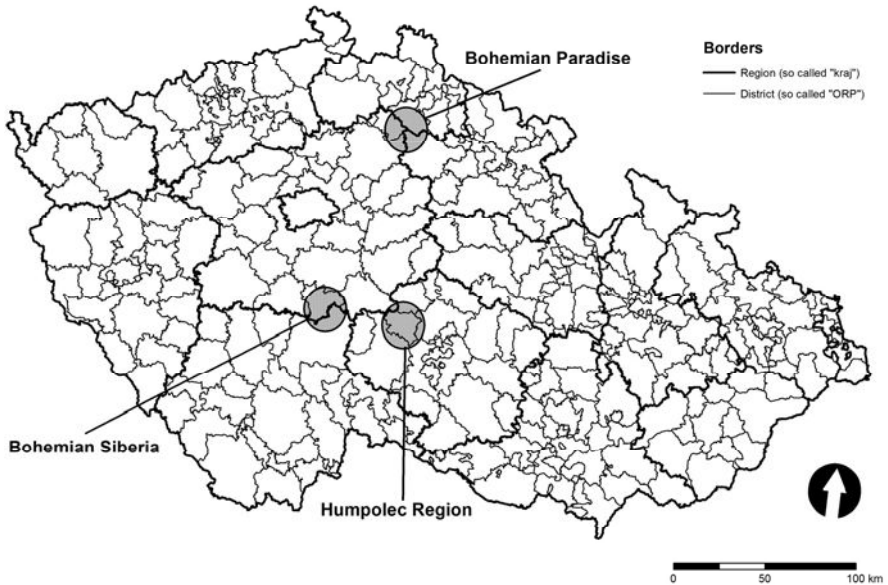
Figure 2-1. Localization of selected case studies within Czechia

There are several studies dealing with the process of the formation and reproduction of regions and regional identity in the Czech literature. They are mainly studies of specific areas in the Czech borderlands that experienced the transfer of Czech Germans after World War II (Chromý and Janů 2003; Šerý and Šimáček 2012), or specific areas in Moravia that had qualitatively different historical conditions for regional formation in comparison to areas in inner Bohemia (Siwek and Kaňok 2000; Siwek and Bogdová 2007). There has been almost no attention paid to the situation in inner Bohemia (Semian 2012b; Chromý et al. 2014). With this knowledge, our case studies (see figure 2-1): Bohemian Paradise (*Český ráj*), Bohemian Siberia (*Česká Sibiř*), and the Humpolec region (*Humpolecko*).

were chosen from the macro-peripheral belt of Prague (Musil and Müller 2008), where understanding local history, local conditions, and the formation of region and regional identity might help in discussions about strategic development planning of microregions. Today, this strategic planning is understood as a means to overcome the problems of inner peripheral areas in Czechia. These areas are generally situated on the borders of higher administrative regions and experience the barrier effect of these borders.

Theoretical framework

As an introduction to the theoretical framework of the conceptualization of region applied in this study, the phenomena of place and region must be briefly distinguished. In the past, scholars often did not specifically distinguish between these two phenomena (Pred 1984). Based on contemporary knowledge, this is no longer possible. Place may be understood as the individual perception of a particular area in space, while the region is based on the collective idea of area (Paasi 1986; Tuan 1977/2011; Heřmanová and Chromý 2009; Vávra 2010).

However, there are many models of the conceptualization of regional institutionalization (see e.g. first chapter of this book), this chapter employed Paasi's concept of the institutionalization of region (Paasi 1986; 2010). This concept deconstructs region into four different shapes: 1. territorial shape (territorial delimitation), 2. symbolic shape (a symbolic apparatus through which the inhabitants identify, and identify with, the region), 3. institutional shape (regional institutions as well as values, customs, traditions, and narratives), and 4. regional embeddedness. These shapes are interconnected and mutually influence one another. While the first three shapes are important for describing regions, the last shape of institutionalization (regional embeddedness) means the recognition of a given region within the regional system. This is most formally expressed when a region gains an administrative role. However, gaining an administrative role is not the most important. More crucial for the existence of a region in the regional system is its recognition in the minds of inhabitants inside and outside the region (Siwek and Bogdová 2007; Semian 2012a).

Paasi (1986, p. 130) states, "the fourth stage of the institutionalization process gives the region an identity," and this identity winds through all the shapes like an imaginary red line. For the conceptualization of regional identity Anssi Paasi's basic concept (1986) is applied. Regional identity can be deconstructed into two main parts: 1. the regional consciousness of

inhabitants, i.e. how people identify with a region and their sense of belonging (see also chapter seven of this book), and 2. the identity of region, or to state it more accurately, the image of region, i.e. natural or objective, built and perceptional ideas and representation of region (see also Riukulehto 2013). Therefore, it is possible to study regions and their formation and reproduction through the formation and reproduction of the above-mentioned four shapes of the institutionalization of regions as well as through the formation and reproduction of regional identity. Thus, we can identify identity bearers in the region, the various group of actors, entrepreneurs, institutions, inhabitants, visitors, etc. that significantly contribute to regional identity reproduction and, therefore, even to the reproduction of the region (Chromý et al. 2009).

Many different kinds of regions exist depending on the methodology used to define them or the purposes for which they have been delimitated. Therefore, different regions may overlap each other in space. Many of these overlapping regions might address the same identity through their symbols and institutions. Therefore, they might be only layers of the same region contributing to the general idea of the region. Generally, we can talk about natural regions (delimitated according to natural units, e.g. geomorphologic units), ethnographic or cultural regions (based on the ethnic, ethnographic, or cultural specificities of their inhabitants), ad hoc regions (regions delimitated for various specific reasons, including nature conservation, landscape protection, cooperation between municipalities, regional promotion, and the administrative arrangement of associations such as the Czech Tourist Club – *Klub Českých turistů*). Administrative regions possessing administrative and self-governance functions are one special and important type of ad hoc region. When any of these regions ceases to exist, its identity becomes a kind of residual value that might still have an influence on the general idea of the region (Zimmerbauer 2011). When thinking about the influences of different kinds of regions on the general idea of a region, functional regions cannot be overlooked as the relations in space they represent influence not only the self-identification of inhabitants, but their idea of the organization of space as well.

On the matter of the territorial delimitation of the general idea of regions based on regional identity, it is apparent that regions thus defined will have fuzzy borders. Therefore, different regions might overlap each other in these fuzzy border areas. Also, thus defined regions may vary according to how strongly inhabitants identify with the region. There are differences not only from region to region, but there may be differences within the territorial borders of a single region as well (Semian 2012b). It is apparent that regions should be studied with sensitivity not only to the

local environment, but to history as well. It must also be taken into account that any research is dependent in two basic ways on the amount of available information about the region being studied. Firstly, it is dependent on the available information derived from the inhabitants' perception of regions and regional systems. Secondly, the amount of available historical information might influence the accuracy of the reconstruction of regions in past.

Approaching case studies

As mentioned above, there might be a plurality of regions in the area. Therefore, the issue of how to select the information related to the regions of study must be addressed. Two types of order can be brought to available information: spatial order and temporal order. In both cases, one must look for similarities in the above-mentioned four shapes of regions and in regional identity. If significant similarities are found, it can be assumed that the sources refer to the same region or that an ad hoc region has adopted a particular regional identity.

When looking for similarities, it is advisable to start with looking at regional names (this topic is dealt with in more detail in Semian 2012a). Regional inhabitants as well as institutions define themselves as belonging through used symbolism; regional name is considered to be regional symbol number one (Paasi 1986). Importantly, it is the most visible and the most unique symbol and is used the same by everyone involved. This method is mostly effective when studying regions with a strong regional identity. On the other hand, one cannot focus on only one regional name when one would like to understand the regional discourse, especially in areas with dynamic changes in the conditions for regional identity formation. It is better to focus on all regional identities present in the studied area and then, using regional names and other symbols, to distinguish between different identities.

It is important to stress the importance of combining different approaches. Discourse and context analyses can be combined with the study of inhabitants' consciousness and their sense of belonging to bring spatial order, in particular. Of course it is more complicated to create temporal order, as it is very difficult or even impossible to reconstruct old personal, let alone collective, identities in the minds of people. It is, however, possible to combine the discourse research with, for example, the analysis of regional narratives, the study of generational differences, etc. This might be helpful in identifying the reproduction of regional

identity. Hence, the focus here is only on discourse analysis; other methods of analysis will be used in the future research.

Historical data for research in case studies areas were first of all extracted from local history books, tourist guidebooks, local history papers, and promotional materials. Sources were obtained from the libraries of regional museums and local public libraries in the studied areas as well as from regional information centers. Mainly, written texts and cartographical illustrations were focused on as primary sources of information; other sources such as postcards and other visual materials were not studied. Available regional websites were used as secondary sources, primarily those of regional institutions (including ad hoc regions) and municipalities, but also websites that were selected by searching for regional names as key words were studied. All available materials were subsequently analyzed with an emphasis on territorial delimitation, used symbols, and institutions. The study focused on the position of the region in space and within the regional system, awareness about the region, and its identity. Further, the potential for the formation and reproduction of region was examined as were the actors and subjects involved in these processes. Changes in the above-mentioned elements over time were studied as well. Through these analyses, the general idea of the studied region can be described and its reproduction in modern history can be observed.

As a first step, the case studies and the regions (regional identities) to be studied needed to be selected. In doing so, some unifying aspects were pinpointed to ensure the continuity of regional identity development throughout modern history, as were some distinguishing aspects, which were assumed to have significant influence on the reproduction of regional identity. These unifying aspects were as follows: being located in the inner periphery of Prague (Musil and Müller 2008), being located within the historical land of Bohemia, and not being influenced by the transfer of the German population after World War II. On the other hand, the distinguishing aspects were: the opened- or closed-nature of functional regions (Hampl 2005), a continuity of administrative jurisdiction, and assumptions about the strength of regional identity.

Based on these aspects, three specific regions for case studies were chosen (see Figure 2-1): the Bohemian Paradise region (*Český ráj*), the Bohemian Siberia region (*Česká Sibiř*), and the Humpolec region (*Humpolecko*). Bohemian Paradise is a region north of Prague that is situated along the borders of many different administrative, natural, and cultural regions. It is a region with a relatively strong regional identity (Chromý et al. 2014) and features a very attractive landscape and natural

conditions. Bohemian Siberia is one of many different regions in the administrative (NUTS III) border area south of Prague, between the capital and the city of Tábor. The regional identities found in this area are not well-rooted in the regional system or in the regional consciousness of its inhabitants, and generally they are of only local importance. Nonetheless, the center of Bohemian Siberia (the town of Milíčín) is well recognizable and the regional name has strong inner potential for reproduction. The area has historically been a long-term peripheral region suffering from depopulation (Dvořák 2003). The Humpolec region is situated in the "middle of nowhere", close to the historical border between Bohemia and Moravia and right between the Bohemian and Moravian capitals of Prague and Brno. This region can be considered to be relatively closed based on data about commuting to work (Hampl 2005) and administrative borders. This region is characterized by its very dynamic history of administrative jurisdiction.

Historical background

When studying regions and their reproduction in time, it is important to be aware of important historical events that may have influenced their evolution. Therefore, before analyzing the discourses of the case study regions, a short summary of modern Czech history will be presented with an emphasis on events influencing and creating conditions for regional identity formation and reproduction.

In Czechia, modern regionalism can be traced to the nineteenth century (Kovařík et al. 1998). As a result of the Industrial Revolution, this period saw a change of traditional human – land relations that resulted in a new spatial organization of the population as well as space relations. As a consequence, the transformation of traditional relations brought the transformation of administrative regionalism as well. New administrative units were from that point on delimited more according to functional relations in space than to possession of land. This change happened in 1850, and since that time the administrative system has undergone several significant changes on different levels of scale in the broader context of changes on the state level (as the state took many appearances over time: the Austrian Empire, the Austro-Hungarian Empire, Czechoslovakia, and Czechia). Just for simplification, a micro-regional scale level (districts), a meso-regional scale level (counties), and macro-regional scale level (lands) can be identified (Jeleček 2000).

At the micro-regional level, in the first decades after 1850 a rise in the number of administrative units can be observed as there were attempts to

make the regional system more precise. These regions were relatively small and closed based on functional relationships. Thus, in a certain sense, there was more or less continuity until the year 1960. Probably the most radical change in administrative regions since 1850 happened in 1960, as the Communists centralized power and leveled natural regional disparities. Microregions were often merged without any regards to actual spatial relationships. In addition, regional capitals were sometimes chosen in contradiction to real conditions as an act of power. In 2003, lesser units that have taken over many of the functions of the older regions were created. The regions created in 1960, however, have not been officially canceled. The new regions created in 2003 can be seen as a return to the continuity of small functionally relatively closed regions. The meso-regional scale level administrative units (*kraje*) were canceled in 1868. Reforms planned in 1921 to restore these units were not effected. This scale level of organization was reinstituted in 1949 with the delimitation of 13 meso-regional units. Major reforms were made in 1960 as these regions were merged to form only seven units, and a special unit for the capital of Prague was established. There was a certain return to former traditions in 2000, when reforms resulted in the reforming of thirteen administrative units along with a special unit for the capital. Nevertheless, these new borders do not exactly match the borders of the thirteen pre-1960 administrative regions, and therefore, these changes have had a significant effect on the formation of regional identity especially in contact areas. On the other hand, contemporary units possess, in contradiction to the former units, self-governmental functions. This has had a significant impact on the reproduction of the regional identity of these regions. The most important date for macro-regional units is 1949, when these units were officially canceled. Since that time they have remained in the discourse only as historical regions, i.e. as the "lands" of Bohemia, Moravia, and Silesia (historické země Čechy, Morava a Slezsko). Jeleček (2000) provides closer insight into this topic.

As mentioned, modern regionalism in Czechia originated in the nineteenth century during the period of the Czech National Revival (*České národní obrození*). This period of history had a strong influence on many spheres of public life and culture as well. The main goals of this revival were to enhance national self-conscience, to prove the global significance of the Czechs, and to raise interest in domestic affairs and homeland (2). On the one hand, these issues were what motivated the revival, but on the other, they were instruments to reach the fundamental dream of Czech national independence as well. What did they mean for regionalism? The influence of these issues can be found in several places. This period saw

the first wave of establishing different ad hoc regions alongside administrative regions. In the second half of the nineteenth century, many civic associations (such as the *Sokol* sports association, the Czech tourist association, etc.) were established. The spatial organization of these associations was later necessary with their institutionalization and further development. Therefore, "Sokol counties" and "tourism counties" were established as some of the very first ad hoc regions in Czechia. Growth in tourism hand in hand with raising interest in homeland brought a new element to regionalism in the form of regional promotion in guidebooks and popular and travel articles, as well as in academic papers and local history journals. Therefore, many areas and regions were labeled, or their already existing names were popularized in that period. Generally, three types of regional names can be observed:

1. names that introduce international names to the regional system with the purpose of bringing the region up to the "world level" and, thus, show the global significance of Czechia (e.g. Bohemian Switzerland – *České Švýcarsko*, Bohemian Siberia – *Česká Sibiř*, Bohemian Manchester – *Český Manchester*, etc.); these names were used generally for regional promotion;

2. names originating in Czech mythology or history (especially from the Hussite Reformation – *Husitská reformace* and the Czech National Revival: e.g. the County of the Blaník Knights – *Kraj Blanických Rytířů*, Žižka County – *Žižkova župa*, Jirásek County – *Jiráskova župa*, etc.); these names were most often connected with the spatial organization of civic associations (3);

3. old, generally ethnographical regional names that were introduced into the modern regional system generally through regional promotion (Haná, Slovácko, Chodsko etc.). This was generally the case of regions in more traditional Moravia. Very similar tendencies in both ethnic Czech as well as German areas can be observed, although the Czechs were more strongly motivated to achieve the goal of raised self-consciousness.

Although many of these names have disappeared over time or have remained as part of residual identities, some have been reproduced and can be still observed in the regional discourse. In the beginning, the identity bearers were generally the Czech elites (artists, politicians, doctors, scientists, etc.), tourists, and different civic associations. They endeavored to "spread the identity" among the general public to ensure the reproduction of the identity (of course they did not think about it in these terms). Regarding regionalism, very similar processes can be observed even after 1918, when the Czechs gained independence, and Czechoslovakia was founded.

The processes took place until World War II, when important changes in the conditions leading to regional reproduction occurred. On the other hand, regionalism in Czechia after 1918 was driven less by the Czech National Revival and more by traditional regionalism with its typically uncritical local or regional patriotism (Chromý 2009).

Of course the war itself meant many changes, but probably the most important event related to the war happened after its conclusion: the transfer of the Czech Germans. In total more than 2.5 million people had to leave Czechia, which was more than one fourth of the whole population. Therefore, almost one third of Czech territory lost the majority of its population. This also meant the loss of identity bearers and a break in the continuity of regional identity reproduction. The population resettlement which followed was inadequate, both in the quantity of newcomers as well as in their quality (Kuldová 2005; Kučera and Chromý 2012). Most of the settlers headed to the cities in basin areas leaving the majority of the area marked for resettlement to be only partially settled, or in some cases not settled at all. This was primarily the case of the "Iron curtain" border zone. Newcomers were generally miners and workers in heavy industry, but also included ethnic minorities such as the Roma and politically undesirable people. The original local and regional communities disappeared and had to be newly established based on new grounds.

The events after World War II also brought about a fundamental ideological shift that affected day-to-day life, all social processes and relations as well as regionalism in Czechia. The beginning of the communist era earmarked this shift. This period was characterized by an unwinding of traditional relationships in space and not only by shifting ideology and values to focus on the working class. This unwinding even occurred in regionalism. Centralized communist decision-making and attempts at leveling regional disparities did not favor regionalism. These tendencies were reflected in the administrative unit reform of 1960 mentioned above. The new political ideology completely changed the relations and structures in space and society in Czechia. The cultural elite were no longer the bearer of regional identity. This role was shifted to the working class and in particular to working class elites, as they often became regional representatives. They saw different values in the area, primarily, economic ones that could also reshape the basis of regional identity. Many "identities" experienced decline in this period, although in some cases they survived thanks to tourist and second home owners who, as outsiders, were attracted to the environment of certain regions and who took up an interest in their surroundings and its history. The phenomenon

of second homes was not new, but during this period it gained qualitatively new forms, connotations, and meanings (Vágner et al. 2011). Also new landscape or natural protected regions were established in these days, often as the result of the initiatives of local actors. In many ways, the protected areas and the new administrative regional institutions were the most important identity bearers of the time.

The last important change was brought about by the Velvet Revolution, another ideological shift that ushered in a return to democratic traditions. This shift is often referred to as the "post-socialist transformation", and it is characterized by a gradual retreat from the application of centralized decision-making and the slow increase in "bottom-up" local or regional development. One of the most important results of this change was the opening up of Czechia to the world and an increase in the economic well-being of Czechia's citizens. This brought slow but gradual change to regionalism and nowadays a regional revival in Czechia can be witnessed. On one hand the shift was stimulated by tourism. Even if the new situation opened up possibilities of traveling abroad to the general population, there has been an increase in interest in homeland and rediscovering many regions as well. This also resulted in regional competition and raised the importance of regional promotion, although it was in a different framework than before World War II. On the other hand, the "new European regionalism" (Keating 2004) also had an effect on Czechia as the country has been integrating into the structures of the European Union. Many new and different ad hoc regions have emerged in the regional discourse often based on cooperation between municipalities, rural regeneration, and sometimes simply on European Union funding. Therefore, many different regional institutions, entrepreneurs, and actors are becoming more and more important for regional reproduction as identity bearers in addition to traditional bearers, tourists, and the general public.

The Case of the Bohemian Paradise

The Bohemian Paradise is a region based primarily on tourism (Nováková and Střída 2002). The roots of the contemporary region date back to the 1870s, although the name is much older and can be traced back to the seventeenth century (Zilynskyj 2005). In those times this name referred to the fertility of the land. With the development of tourism in Czechia in the nineteenth century, a semantic shift occurred and the name began to describe natural and landscape beauty. It should be noted that at first the name was used by Czech Germans for the area surrounding Litoměřice as

Paradies von Böhmen. In the spirit of the Czech National Revival, Czech public elites were unhappy about this situation (they asked: "Why should the Bohemian Paradise be located in an ethnic German area?"), and they started to call the Hruboskalsko area close to the city of Turnov featuring sandstone rock formations *Český ráj* (Bohemian Paradise). Therefore, at the end of the nineteenth and in the first half of the twentieth century there were two regions sharing the name of Bohemian Paradise. This regional dichotomy disappeared with the transfer of the Czech Germans after World War II (for more detailed information as well as for different theories of the emergence of the contemporary Bohemian Paradise see Zilynskyj 2005; Chodějovská 2012).

From the beginning, the name was used mainly for regional promotion and was reproduced in various tourist guidebooks as well as in local history articles (e.g. Prýl 1887). Therefore, regional identity was created primarily by the public elites and tourists, as well as by rock climbers. Soon it started to be accepted by the general public as well as by the local inhabitants. The basis on which this region was founded remained tightly tied to tourism. Probably the first ad hoc region named Bohemian Paradise in this area was an administrative region of the Czech Tourist Club. The Bohemian Paradise county (*župa Český ráj*) was established when the Czech Tourist Club was reorganized in 1919. At this time, the region was definitely no longer understood to comprise just the small area of Hruboskalsko, but a much broader area. On the other hand, the precise territorial delimitation is difficult to describe as the perception was, and still is, very subjective. Probably the broadest delimitation of the region was that defined by the tourist county mentioned above, which covered the area from the city of Český Dub to Jičín and from Semily to Mladá Boleslav (Herbst 1927).

One of the most important ad hoc regions established in the area of the Bohemian Paradise is the Bohemian Paradise Protected Landscape Area (*Chráněná krajinná oblast Český ráj*; further PLA). The PLA was established in 1954 as the first of its kind in Czechia in response to increasing demands on landscape use. This happened mainly for two reasons: the closure of borders by the communist state increased the role of domestic tourism, but primarily the transition to communist values resulted in the economic exploitation of the landscape. The PLA initiative was in the beginning run by a few local enthusiasts more than by the laws and efforts of the central government. The PLA has become, with a growing awareness of the importance of landscape protection and nature conservation, one of the most important bearers of traditional values and has contributed to overcoming the unwinding that occurred during the

communist period. Another important factor that helped reproduce the traditional identity and values of the region was the development of the second home phenomenon that has always been of great importance in Bohemian Paradise.

The new European regionalism of the last decade of the twentieth century has brought a "revival" of the Bohemian Paradise identity. It should, however, be noted that the identity of the Bohemian Paradise was always relatively strong and well recognizable compared to other regions. Therefore, the strong promotional (marketing) potential of the regional name was recognized. Many ad hoc regions have started to use the name directly or at least indirectly (e.g. Local Action Group Gateway to the Bohemian Paradise – *MAS Brána do Českého ráje*). The most important ad hoc regions using the name Bohemian Paradise are the Tourism Region (*turistický region*), the National Geopark (*národní geopark*), and Geopark UNESCO as well as several Voluntary Associations of Municipalities (*dobrovolné svazky obcí*) and LAGs. Among other things, the existence of these regions as well as the growing interest in homeland among the general public powered by tourism have helped to further strengthen the Bohemian Paradise identity.

In general, we can conclude that the Bohemian Paradise and its reproduction are strongly tied to tourism. It is a region with a long tradition dating back to the nineteenth century. The territory of the Český ráj PLA (which was expanded in 2002) can be considered to be the core area of the region, although, probably the most precise delimitation of the region can be described as roughly the triangle formed between the cities of Mnichovo Hradiště, Jičín, and Železný Brod. Much broader delimitations, however, do exist, each serving a different purpose; this is especially true in the southern parts of the region where there is no neighboring region with a dominant and strong identity. The symbolic apparatus of Bohemian Paradise is supported mainly by natural specificities (sandstone rock formations) and by the graceful linking of natural and culture-historical components of the landscape which, for example, are reflected in the most frequently used and recognizable symbol of the region: the panoramic view of the castle ruins of Trosky sitting atop two basalt volcanic necks (Chromý et al. 2014). The reproduction of a strong identity is also driven by the diverse range of regional institutions possessing the name Bohemian Paradise. Besides the above-mentioned institutions of ad hoc regions, there are also other institutions featuring the name, e.g. an internet-based television channel, a local outdoor shop as well as a regional museum.

The Case of Bohemian Siberia

Several places in Czechia have been called Bohemian Siberia throughout history. But we can find the long-term continuity of region only in the case of Bohemian Siberia situated south of Prague and close to Tábor on the border between two administrative (NUTS III) regions: the Central and South Bohemia Regions (*Středočeský* and *Jihočeský kraj*). The name can be dated back to at least the nineteenth century. It was however, most likely, used for the hilly area around the town of Miličín even earlier (Mejsnar 1892). Miličín is, and always was, considered the center of Bohemian Siberia. It was an important town until the development of the railways in the area in the 1870s because it served as a horse-exchange and sleep-over station on the way from South Bohemia to Prague and back. The area is slightly prominent in terms of altitude, and the climate is colder and winters are longer than in surrounding areas. Snow stays on the fields longer as well. This is what motivated people to label the area Bohemian Siberia. After a railway connection was opened that avoided Miličín, the town started to decline quickly. Moreover, the area is part of a rather poor belt separating Central and South Bohemia, which suffers from long-term depopulation (Dvořák 2003). Therefore, the region is a typical example of an inner macro-peripheral area of Prague (Musil and Müller 2008).

The name Bohemian Siberia is in the discourse strongly linked to Jan Herben, a Czech politician, journalist, and novelist and also second home owner in the village of Hostišov, situated close to Miličín. He is believed by many to have used the name for the first time in his masterpiece *Hostišov* (Herben 1907; e.g. Heller 1941; Toufar 2004). Herben himself noted that the area around Miličín was sometimes referred to as Bohemian Siberia, and he used this name several times in his novel. He personally, however, usually called the area the Northern Tábor region (*severní Táborsko*), because of the Hussite tradition (4) that was in favor during the Czech National Revival (Zahradníček 2007). Nonetheless, it was his masterpiece *Hostišov* that contributed to the broader awareness of the name and region. The region was generally understood to mean the area covered by the Miličín hills between the towns of Miličín and Votice and their immediate surroundings featuring a similar climate. The name was used generally for promotional purposes mainly to attract the attention of tourists to this "forgotten" region (e.g. Charvát 1923). In the 1930s, it also became a kind of motto for local beautification associations. Probably the most active association was the one in Miličín (Zahradníček 2007). It

strengthened the very tight relationship between Miličín and Bohemian Siberia.

A similar trend continued even after World War II. The institutions bearing Bohemian Siberia in their name were tightly connected to the town of Miličín, such as the hunting association, the collective farm, etc. Probably one of the most important bearers of the Bohemian Siberia identity during the communist era was the *Motorest Česká Sibiř* hotel and restaurant, which opened in 1970. The restaurant is a strictly localized phenomenon that had, and still has, influence on the thousands of drivers that pass it every day. In some other sources (generally tourism-related) the region is mostly referred to as the Miličín hills (e.g. Špaček and Buben 1962; Děták 1974), but from time to time even broader delimitations can be encountered (e.g. Wiesner 1971). The lack of sources reflects the fact that Bohemian Siberia did not enjoy as much interest from tourists as it deserved at the time. Therefore, Bohemian Siberia was often recalled for its potential to produce difficult situations for drivers on the road between the towns of Miličín and Votice (Zahradníček 2007).

Today, there is still a very close relationship between Bohemian Siberia and Miličín. However, the revival of regionalism has also influenced this area as has the development of domestic tourism (especially winter sports). On the other hand, through contemporary development the very weak position of the Bohemian Siberia identity can be documented. Many new ad hoc regions have emerged in the area, but none of them refers directly to the Bohemian Siberia identity. Generally, the motivation behind the names of these ad hoc regions is very local in character. Also websites providing information to tourists, such as snow reports, do not share a constant name for the area. As a consequence of this struggle between identities, several very broad delimitations of the Bohemian Siberia region have appeared in the discourse (generally they are Miličín-centric) as a part of the effort to emphasize the importance of the region in comparison to others.

It can be stated that many different regional identities in the Miličín area can be described. In the discourse, the expansion of surrounding identities (mainly those of Podblanicko – *Region under Blaník Mountain* and Bohemian Meran – *Český Merán*) to the Miličín area and vice versa the expansion of the Bohemian Siberia identity to the broader surroundings of Miličín can be identified. Besides these three identities that leave a stronger imprint on the area, many other residual and contemporary identities exist (such as *Čertovo Břemeno*, *Kozácko*, *Táborsko*, etc.). These identities overlap each other and none is really superior. There are several possible reasons for this regional

"hodgepodge". Historically, no identity was well-established in the regional system. The absence of a strong regional center binding the area together, among other things, in the context of new regionalist initiatives resulted in the disintegration of the area and its partial inclusion in surrounding regions. The name of Bohemian Siberia has a long tradition and strong promotional potential and is tightly tied to the town of Miličín.

The second and even more important center in the area is the town of Votice, which has never truly accepted this identity as its own. This can be documented through the discourse of institutional shape. Even though several institutions referring to the Bohemian Siberia identity can be identified (such as hotel, shops, museum, etc.), they are generally situated in Miličín. In cases where other institutions refer to this identity, if they do so at all, they do so only indirectly ("as being situated close to Bohemian Siberia"). The symbolic shape of the region lacks a single common visualization. Therefore, the strongest regional symbols are connected to its colder climate, longer winters, and hills, especially the highest peak of Mezivrata featuring a transmitter tower and Kalvárie, a myth-enshrouded hill. Territorial delimitation is also not easy. The core area can be definitely described as the Miličín hills between Miličín and Votice. More frequently, a broader delimitation ranging from the town of Sedlec-Prčice to Louňovice pod Blaníkem and from Votice to Mladá Vožice can be observed. In this case further research into the inhabitants' perception of the region will be more than helpful.

The Case of the Humpolec Region

This region is closely connected to its center, the old city of Humpolec. It is situated at the residual border of the historical lands of Bohemia and Moravia in the Bohemian-Moravian Highlands right between their two capitals of Prague and Brno and on the main highway connecting South and East Bohemia. The area is characterized by its lack of a single leading center, and historically it was comprised of several mid-sized cities competing for functions. The area is quite poor and traditionally agricultural. On the other hand, Humpolec was once known world-wide for its textile mills. During the Czech National Revival it was sometimes called the Bohemian Manchester.

In the regional discourse the Humpolec region is most commonly understood in its administrative boundaries since the second half of nineteenth century. Humpolec received administrative functions during the first administrative reform of 1850. In the beginning, it had only lesser functions (as a juridical district – *soudní okres*) under the higher

administrative unit (as a political district – *politický okres*) of Německý Brod (today Havlíčkův Brod). In 1855, it gained a higher status (as a joint district – *smíšený okres*) for a short period, as in 1868 the administrative function of Humpolec reverted back to its 1850 state. Beginning in 1910, Humpolec possessed a higher administrative function (as a political district) once again and kept this function (with a short exception during World War II) until the communist reform in 1960. In this period, Humpolec is generally understood in its administrative boundaries (e.g. Kobliha 1869; Auerhan and Štencl 1925; Tomíček 1934; compare with the broader delimitation of Letáček 1942; Čábera 1960). From the cultural-ethnographical point of view Humpolec and its surroundings can be considered to be a marginal part of the Horácko region, or, more specifically, Bohemian Horácko (*České Horácko*). This fact is almost not reflected in the regional discourse at all (one of few examples is Kopáč 1927). In the discourse, the Zálesí region is referred to with the greatest frequency. This name historically referred to the surroundings of the town of Želiv (Tomíček 1934), but during the Czech National Revival its meaning was transferred to cover the whole Humpolec administrative region, and it started to be used as a synonym for it.

The year 1960 was crucial for the reproduction of the Humpolec regional identity. Firstly, it meant the cancellation of a Humpolec-centered administrative unit as mentioned above. The majority of the Humpolec district area together with the city of Humpolec became a part of the Pelhřimov district. The rest became part of the Havlíčkův Brod and Jihlava districts. Secondly, it brought the delinking of the administrative relationship of the area from Jihlava (the regional capital since 1949), and Humpolec along with the entire Pelhřimov district became part of the South Bohemia Region. Therefore, Humpolec was closer to the national capital of Prague than to the regional capital of České Budějovice; with the construction of the first main Czech highway connecting Prague and Brno (completed in 1980), Prague became even more easily accessible. In synergy with the fact that this region is not particularly attractive to tourists, this meant serious problems for the reproduction of identity based on administrative regions and resulted in a decline of regional identity. The Humpolec region began to be mostly understood as an undefined area close to the city of Humpolec. The name of Zálesí also started to be forgotten.

In the contemporary discourse the region is regaining its importance. Humpolec regained a position in the territorial administrative system once again in 2003 when the reform implementing new district units was set into action. Nevertheless, the district has been restored within the

boundaries of the above-mentioned broader Pelhřimov district. Therefore, the contemporary Humpolec region has lost its eastern part in comparison to the situation before 1960. Regional identity is supported by several ad hoc regions in the area, especially by the Zálesí microregion and LAG Association for the Development of the Humpolec Region (*MAS Společnost pro rozvoj Humpolecka*), which both more or less follow contemporary administrative regional boundaries. Therefore, we can see the names of Zálesí and Humpolecko are used in reference to the similar territorial delimitation even in the contemporary discourse. Also the higher administrative units were reformed in 2000 and the Jihlava Region (NUTS III) was restored with slightly different borders under the new name of the Vysočina Region. Therefore, the regional affiliation of Humpolec changed once again. However, the Vysočina Region has one of the best examples of successful regional marketing. The reintegration of the Humpolec region into the administrative structures of the Vysočina Region can be considered successful despite the fact that it has closer relations to Prague than to Jihlava, the regional capital. These changes have caused generational differences in the sense of belonging.

In summary, it can be stated that the Humpolec region is very strongly connected to the administrative unit of Humpolec. There is a sort of dichotomy in regional names as the Humpolec region and Zálesí generally refer to the same area. Therefore, the territorial shape of the region can be described best by its administrative borders, despite the fact that historically the name of the region referred to a broader area. On the other hand, its symbolic shape is not well recognizable, and it also lacks a single unifying visual symbol. The city of Humpolec can be considered its major symbol. It can be stated that its institutional shape is becoming more diversified; besides the above-mentioned ad hoc and administrative regions, there are other various institutions that refer to one of its two regional names (a museum, a local history journal, a motor sports club, etc.).

Periodization of modern Czech history from regionalist perspective

The conceptualization of region as a social construction facilitates its definition as an open framework, an entity with collective meaning. Thus, the reproduction of region can be studied through the reproduction of regional identity. This results in a very complex and temporally dynamic understanding of region. It is necessary to approach studied regions with local and historical sensitivity. This chapter attempts to contribute to the

international discussion of mechanisms of region formation and reproduction and stresses the importance of a historical approach. An effort was also made to periodize modern Czech history from the position of region and regional identity formation and reproduction.

In conclusion, it can be stated that through the presented analysis four important periods for regional reproduction in modern Czech history can be identified. As this regional research deals with the concept of fuzzy borders, it must also be taken into account that, generally speaking, there will be some fuzzy time splits in its periodization (Wishart 2004). The first period began with the birth of "modern regionalism" in Czechia. The year 1850, when the first modern administrative reform was implemented, can be considered a reference date. This period lasted until the declaration of Czechoslovakia's independence in 1918. This period is characterized by the formation of regions mainly through tourism and administrative organization, strongly driven by the Czech National Revival. It was a time of interest in homeland and delimitating and describing regions. Regions subsequently started to be reproduced and if they were successful they obtained a position in the regional system and in the perception of their inhabitants. The next period lasted approximately from 1918 until the end of World War II; in this case 1945 can be considered to be a reference date. Traditional regionalism can be considered to be the main impetus in this period. This period is characterized by uncritical patriotism stressing local or regional specificities and the formation of regional communities based on the principle of "us" vs. "the others". The third period might be called "the communist era". In Czechia it lasted from World War II until the 1990s (5). In this period, power was centralized, and there was a transition of values led by a change of ideology and power structures. This caused, among other things, the decline of regionalism. Nature conservation and landscape protection initiatives were probably the only important regionalist impetuses in this era. Finally, the contemporary period began in the 1990s. This period can be considered an era of the revival of regionalism. Regions are gaining more and more importance in national, as well as international, strategic planning, and the emergence of many new different forms of regions can also be observed. It can be seen that with the integration of Czechia into the structures of the European Union, the new regionalism has come into action. An increase in the "bottom-up" activation of regions as well as in regional marketing and promotional activities can be observed.

The examined case studies were chosen to show differences in the construction and reproduction of regional identity. Some general notes however can be concluded. Firstly, the importance of natural and

landscape features in the reproduction of identity should be pointed out, especially considering that one of the most important processes contributing to regional reproduction is tourism. Landscape features can act as unique symbols, through which regional institutions and inhabitants can identify with the area (e.g. sandstone rock formations or the castle ruins of Trosky in the Bohemian Paradise). Similarly, specific natural conditions (e.g. climatic conditions in Bohemian Siberia) can act as an unifying aspect for defining "us" and "the others". Natural regions as well as landscape or nature protection regions then strongly influence the territorial delimitation of regions (e.g. the Český ráj PLA in the case of the Bohemian Paradise).

On the other hand, the importance of administrative regions in regional reproduction has been explored. Administrative regions are the most formal expression of regional embeddedness in the regional system, playing the dominant role in the formation of regions. The more administrative regions are delimitated organically according to existing relations in space, the bigger the impact on regional identity can be expected. The existence of other forms of regions might weaken this impact, although this is not totally the truth in the case of the Humpolec region where other regional forms supporting the administrative region can be observed. It can be expected that administrative regions will have a bigger impact in areas lacking a strong or unique identity based on other features (natural, social or mental).

It is apparent that probably the most decisive role in building regions and their recognition in the regional system is played by inhabitants in, as well as outside, the region. Only by reflecting the information they perceive can a region become fully established. It is also easier for such regions to be reproduced and also to be more resilient to changes and disappearance. Therefore, discourse analysis serves only as a first step in regional research. Further research should focus on validating the above-mentioned results and statements in the collective ideas and images of the inhabitants of these regions.

Chapter Three

Exploring 21ST Century Regional History in Ecohealth and Wellbeing Research

Elize S. van Eeden

Methodologically engaging with regional history studies in traditional times (Iggers 2005, 475; Van Eeden 2014c, 118–140; Van Eeden 2014b, 27–43), and even more so in ever increasing, challenging and complicated present-day research contexts of disciplinary or multidisciplinary, interdisciplinary and/or transdisciplinary research (Van Eeden 2013, 1–34; Van Eeden 2014e, 1–24), requires revitalized ways of considering epistemological thoughts in the field. (1) In some past regional history studies, possibilities for integrative multidisciplinary modes of knowledge production in investigating a broad spectrum of fields and/or phenomena were occasionally embraced, while being marginalized in the era of globalization. (2) Though the research under discussion will not be on the debate of the marginalization of History in general, nor its nationalization or the multidisciplinary integrative features of regional history (Van Eeden 2013, 1–34; Van Eeden 2014a), some aspects of these historiographies as part of the regional history in South Africa (with emphasis on exposure to a refreshed mode of considering studies in regional history) will indirectly expose the scope of said field. Ways of, for example, dealing with ecohealth and wellbeing as theme in a recently developed framework for understanding and doing regional history form the second part of the discussion. The explored area, with its transnational and global associations and tangled up with a regional and local "beingness", is the Far West Rand in South Africa. Locally, the Far West Rand forms part of the West Rand District Municipality that resorts under the Westonaria municipality known as Bekkersdal. (3)

Regional history studies in South Africa

Research in history on places and its peoples in South Africa (known in South Africa's past as local history or regional history studies) was formalized by the mid-seventies as regional history with an open agenda and no particular defined framework. At the time, different schools of thought engaged in research on ordinary people in urban and rural areas (Bonner 2010, 14–15). These events coincided with decades during which the apartheid legislation of South Africa (applicable to all its races) was a detrimental factor causing dissatisfaction that would eventually erupt as political turmoil (*History of South Africa* 2014, chaps. 17–19; Giliomee & Mbenga 2007, chap. 15) and which either implicitly or explicitly impacted on the historiographical landscape of recording some regional histories of South Africa. (4)

A personal understanding of regional history, which will also surface later in the discussion regarding the refreshed mode of thought suggested for regional history studies, is that it is research that relates to the uncovering or exposure of a particular area or space, debating a particular phenomenon within this area or space, and describing these in an area's development within a very specific time frame, but always with the intention of also uncovering its regional, national and/or global impact or understanding. (5)

In the early 1980s, a basic research framework for local history was developed by British-born Victor Skipp (1981, 325–391). This structure with no particular "unifying theme" or phenomenon (and adapted versions thereof – see Massouras 2013, 21) was at that time followed by some postgraduate South African scholars in History (Eloff 1986, 1; Van Eeden 2014c, 118–140). According to this example, the regional historian has to follow a narrative and descriptive approach that should include a strict analytical methodology, not forgetting to consider comparisons as well. The "Skipp model" suggests that the historical development of all fields locally, namely the political, economic, cultural, etc., could be studied simultaneously in a single research project. However, the variety of fields and themes or phenomena could also be studied separately and independently (Skipp 1981, 329). Skipp did not provide any extensive description or suggestion(s) of how to approach each of the locally identified fields of research if all had to be researched and discussed as separate entities. If separate, more thought with regard to focus and outcome will obviously have to be considered (compare Sheeran & Sheeran 1998, 67–83).

By accentuating a local history research approach, scholars, and particularly those of the University of the Witwatersrand, engaged in public and sociocultural history by also considering research from several interdisciplinary angles from the early 21st century up to the time of writing. (6) At the Vaal Triangle Campus of the North-West University, regional history is currently emphasized as a (revitalized) continuation of the traditional thoughts regarding regional and local history in South Africa. (7) Especially prominent is British and French historical thought (8) by also continuing to search for possibilities with a view to an extensive research framework revitalization inclusive of multidisciplinary considerations. (9) Though past historians in South Africa engaged (as some still do) in regional history-related studies, their connection to it as branching from regional history studies currently seems limited (compare Freund 2005, 27) to non-existent. Current international trends of articulating regional history would appear to not yet having been digested in South Africa. (10)

Present-day thoughts on regional history research accentuate connections of the spatial turn to the general globalization analysis. To quote Sulevi Riukulehto (2010, 1–7), who in turn also quotes Olofsson and Öhman (2007, 877–895):

> Finally, after the twenty years of linguistic turn, historians and other history-oriented scholars have deliberately risen such terms as "region", "space" and "territory" into the focus of historiography, too. The turn to space has connections with the various forms of history from below, such as the traditions of local history, micro-history and family history. In all these directions of historiography the role of space must have been taken into account in a new way…The specific features of place – the forum where history is made – may be decisive to historical analysis… The regionalist paradigm is stressing the importance of place in explaining success and failure and the need for endogenous growth strategies. (11)

In the last part of the above quote, Riukulehto (2010, 1–7 and Chapter One of this book) refers to the voices for place in a regionalist paradigm such as Greg Hise (on planning history), Aaron Klieman (on denied regionalism, 2008), Svein Frisvoll and Johan F. Rye (on a new regionalism development scheme, 2009), as well as Elizabeth Gerber and Clarc Gibson (on balancing regionalism and localism, 2009). Then there is also the 2007 contribution to regional history in the edited publication *An Agenda for Regional History* by Bill Lancaster, Diana Newton and Natasha Vall of the United Kingdom, which is regarded by Riukulehto as the first major book written under the label of regional history (Riukulehto 2010, 2).

Discussions on region and place inclusive of society by sociologists like Anthony Giddens (1984) and geographers such as Andrew Jonas and Mei-Po Kwan, et al (2003, 1–3) should equally be considered because the "regional" in regional history studies is not accomplished by following a silo approach to research. Jonas also emphasizes the research interest showed in the past years in economic resilience, and very much connected to the metaphor of regional resilience. The example of Bekkersdal later in the discussion – as viewed from an ecohealth and wellbeing perspective – could very well be associated with the thoughts of Jonas (2012, 267–268). He asserts that:

> The metaphor of regional resilience has acquired a certain intellectual currency in part because of its ability to link regional economic development to problems of social equity and environmentalism. More pertinently, resilience analysis opens up a different way of thinking about the ways in which regional economic development processes are – or could be – seen as territorialized. Notably, in these times of economic and environmental crisis, the metaphor of resilience resonates with the notion that economic development involves resistance and adaptation as much as growth and competition.

As no country's regional and local history functions identically (for example, in the political legacy that sometimes is closely knitted to ways of local administration and responsibility), the next section mainly serves as a point of departure for revitalized thinking in the field of regional history studies.

A refreshed framework for regional history in the 21st century

The criteria to comply with can perhaps serve as a guideline summary for the most important benchmarks required to progress towards a regional history study supportive of inclusive thinking on particular fields and some themes and/or phenomena in consideration of very specific theme foci and outcomes (see Figure 3-1). Postgraduate students (12), for example, by doing research on places and their peoples, may find these criteria very helpful when piloting their intended research. Postgraduate studies, to my mind, can be limited in scope in the sense of local histories (the "what area" and "what of the area" questions partially related to Riukulehto's plea in Chapter One), but still be part of or contribute to very deliberate research processes or standing projects to progress towards a broader regional historical understanding (the "what direction" as Sulevi

Riukulehto puts it in Chapter One) and as diagrammatically outlined later in the discussion. The criteria to consider include, amongst others:

– All narrow histories in a geographic region should sufficiently cover all aspects of developments of a particular theme or phenomenon in a local environment or area (e.g. as the Skipp approach does);

– All narrow histories in a defined geographic region must be representative of all the communities that form part of a particular theme or phenomenon in a local environment or area;

– The research approach and methodology should cover history from top-down and bottom-up angles to encapsulate local developments in all fields, as well as the experiences (e.g. the wellbeing status) of a random but representative selection of local inhabitants (e.g. interviews and/or oral memories);

– In the research approach and methodology regarding a particular local/regional theme, research information obtained from all disciplinary angles should also be considered. It could be done indirectly through existing research data/reports, but preferably with the consent and input of other disciplinary expertise;

– Although a narrow history on its own serves the purpose of, among others things, recording and disseminating primary and secondary resource knowledge on places and their peoples, its optimal epistemological value (to be considered in broader regional histories) probably lies in combining it with a particular theme or themes and/or phenomena with the intention of reflecting its local, regional, national and international impact(s) or status.

In many ways, the above-mentioned proposed criteria represent an approach to develop research frameworks that lean more towards gaining and creating informative regional history studies that can be structured in a responsible and meaningful way. Yet it must be said that it is not possible for a single individual to provide true meaning to a regional historical study because of the wide thematic field that must be covered to produce all-inclusive contributions of a richer value.

In essence, then, regional history research features the **covering of a particular geographic area or space** (13), debating a **particular phenomenon** within this **area** or **space**, and describing these in the development of an area within a very **specific time frame** (14) but always with consideration of **broader driven processes.** (15)

Table 3-1 (following page). Structuring the comprehensive nature of places and peoples in a region.

Some fields of study	Some themes of study[1]	Considerations for focussed research in theme(s) and/or phenomena[2] of study/studies	Some outcomes of studies for the region/local or broader area	Research method: Possibilities during the process of doing research
Regional history	- Settlement movements	- Growth, decline and change	* Analysing growth, decline and change	- Recording knowledge systems
- Local	- Local governance & management patterns/issues	- Indigenous knowledge systems	* Recording the economic and/or physical experience	- Philosophical
- Rural	- Urbanisation	- Race (all-inclusive and/or specific)	* Reflecting the physical and/or psychological experience of people (e.g. sense of space & place and/or impact by space, and place due to human activity)	- Archaeological
- Agrarian	- Social structures and cultural patterns	- Class (all-inclusive and/or specific)		- Social/modern social
- Urban	- Political trends	- Gender (all-inclusive and/or specific)		- Cultural
- Township	- Demographic patterns	- Identity	* Practising the integrative multidisciplinary experience towards all-inclusive knowledge	- Multidisciplinary
- Family	- Infrastructural features	- Relations (e.g. colonial; public versus private sector)	* Gaining regional, national and global insights	- Perspectives from the bottom up and top down
- Community	- Industrialisation	- Policy issues	* Awareness of differences and/or similarities	- Mixed methods…
- People	- Economic developments	- Poverty	* Providing perspectives for policy-making decisions…	
- Public	- Agricultural tendencies	- Environmental destruction and/or remediation and/or other issues		
- Environment	- Ecohealth trends	- Regionalisation		
- Place	- Human wellbeing	- Globalisation…		
- Space	- Education development			
- Area	- Communication patterns			
- Heritage…	- Heritage and tourism development			
	- Spiritual practices			
	- Law, order and military impacts			
	- Land			
	- Environmental crises			
	- Conservation…			

A R E G I O N A L or L O C A L A R E A

[1] In regional history a theme, amongst others, covers the following trends in the research: The how of acquiring a place by humans; the process and status of development and sustainable lively hoods; the level of consumerism and cultural mannerisms.

[2] Specific phenomena within the regional history theme could be: class issues; gender trends; poverty; environmental status; human resilience in destructed environments; human well-being status/ experiences; extraordinary people and events; extraordinary industries and corporations; politics and land issues.

These insights could and rightly should – in the process of recording and debating the particular research – be reflected against broader historical contexts and/or be absorbable by other publications intended to cover or display the historical development of a region in all fields pertaining to human life. From this broader scope of the history of a region (to which more than one historian or various fields of disciplines should contribute), the "worthiness" of micro or narrow varieties of regional and local history productions, absorbed or utilized within this larger scope, will find more meaning than its original anticipation as microhistory contribution (Van Eeden 2014e).

    As an example of the comprehensive nature of places and their peoples in a region, Table 3-1 serves as an extended refreshed mode of thought which, in some sense, has departed from contributions of pioneers such as Skipp and Finberg. This table template may serve as a standard (work-in-progress) grid for contemplating on regional history to avoid approaching regional histories in sloppy ways (reference to Armitage's remark in 2001, 32–47) and to progress towards appreciating regional and local history studies as branches of History (Van Eeden 2014e). To exemplify the possible use of Table 3-1 grid as provided above, regional history research on the township of Bekkersdal (with ecohealth and wellbeing as themes of study) serves as point of discussion in the sections that follow.

Bekkersdal as community in a growing "post-mining" context (16)

Historically, the establishment of Bekkersdal in 1949 (very much Afrikaans by name and known as Bekkersdal ever since the 1960s) occurred during South Africa's peak era of apartheid, which allowed for limited to temporary land occupation close to gold mining industries or on mine property itself. Though local governments – in the early days of mining operations in the Far West Rand – were involved in providing financial and administrative assistance to newly established townships for black people (and also "officially", with government's consent, allowed for structured squatting due to housing shortages), local governments have never been in a financial position to support the development of township infrastructures on a large scale. Because of government policy at the time – that marks controversial landownership history – and because of arrangements after the introduction of the Group Areas Act in 1964, the focus of development mostly favored the surrounding gold mines and the white minority in this particular area. As a consequence, its colonial and apartheid past, together with strenuous environmental circumstances (Van

Eeden 2006, 409–430), sanctioned the limited considerations and possibilities with regard to financial investment particularly to upgrade the informal settlement areas of Bekkersdal where dissatisfaction with service delivery mostly occurred over three decades (Khaba and Van Eeden 2015, 1–16).

In addition to growing concern with regard to unemployment in a much wider regional context than that of Bekkersdal only (Olowu and Wunsch 2004, 310), retrenchments occurred in especially the gold mining sector (Van Eeden 2014d, 12). Column two of Figure 3-1 focuses on the consideration of a multidisciplinary project that would broadly cover themes of ecohealth and wellbeing (Van Eeden 2011, 251–272). A thorough understanding of the historical development of the region and the township, including recording the present status of resilience by specifically Bekkersdal inhabitants, was decided on (Van Eeden 2014d).
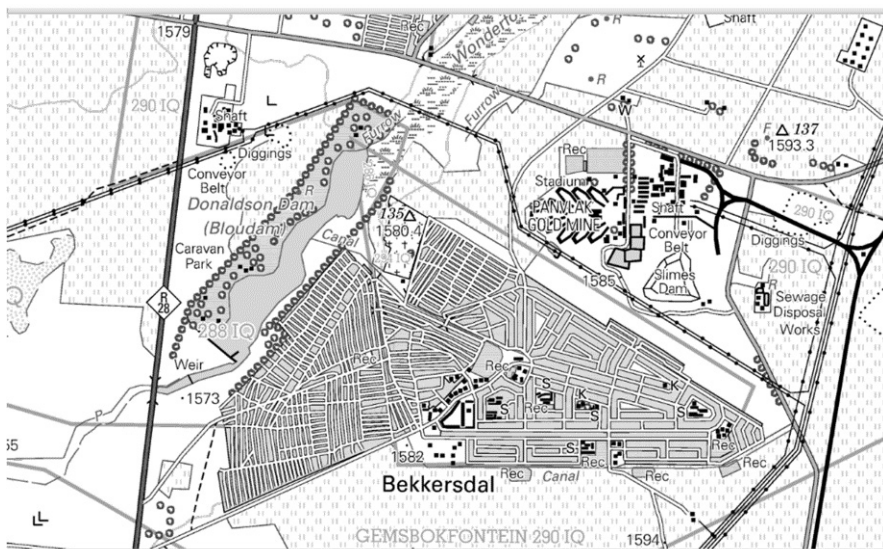

Figure 3-1. Map of the Bekkersdal Township, South Africa.
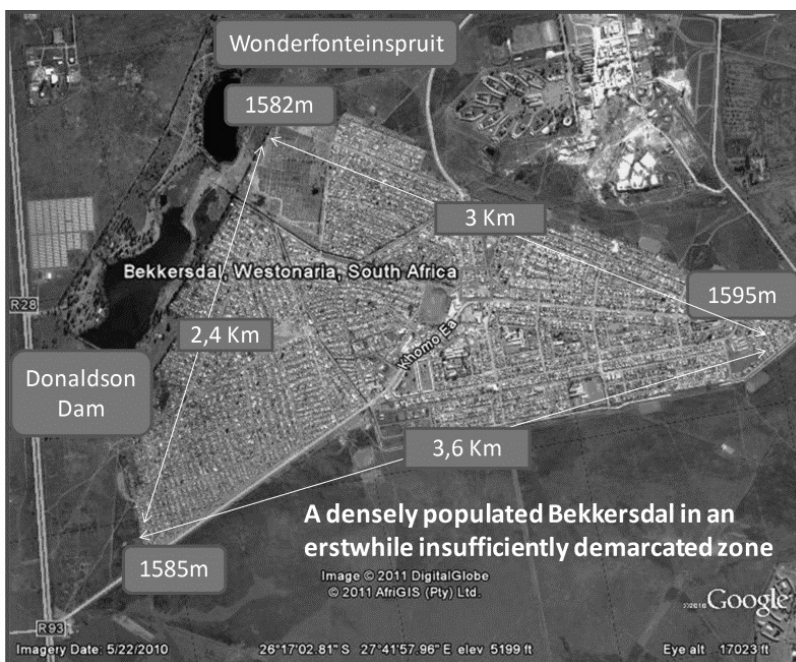Source: Winde 2010.

Figure 3-2. Locational map of the Bekkersdal Township, South Africa.

An equally broad conceptual understanding of ecohealth (inclusive of wellbeing) has been adopted by the IMD team. The broad ecohealth and wellbeing understanding regarding this project covers the standard issues also accentuated by ecohealth experts, which include, amongst others, to determine the ecohealth (and wellbeing) status of people in: (17)

– their built-up environment (e.g. services, housing, service delivery, local management, security);
– their immediate and/or natural environment (e.g. environmental capacity, experiences, issues, concerns); and
– their wellbeing (e.g. financial, physical, social, emotional, psychological environment).

As for the major research objectives of history as participating discipline (and particularly those of a regional historian) in a team inclusive of several disciplines, the tasks focused on in this context of space and time (see the fields as indicated in the aforementioned Table 3-1) are on an urban

township, and with ecohealth and wellbeing as broad theme of study (see Table 3-1). Considerations for the focused regional history research themes (see Tables 3-1 and 3-2) were to:

–   record and historically analyze primary research information and published research that should reveal the health history and wellbeing status of the Bekkersdal community and broader area before 1945 and until 2013 (thus, the growth, decline and/or change coupled with poverty); and
–   record oral and written information (the latter in popular and scientific writing) on the responses and impressions of the Bekkersdal community members (and its immediate authority) regarding a means of coping with their status of living and their experience of the natural environment (inclusive of environmental destruction and/or remediation and/or other issues).
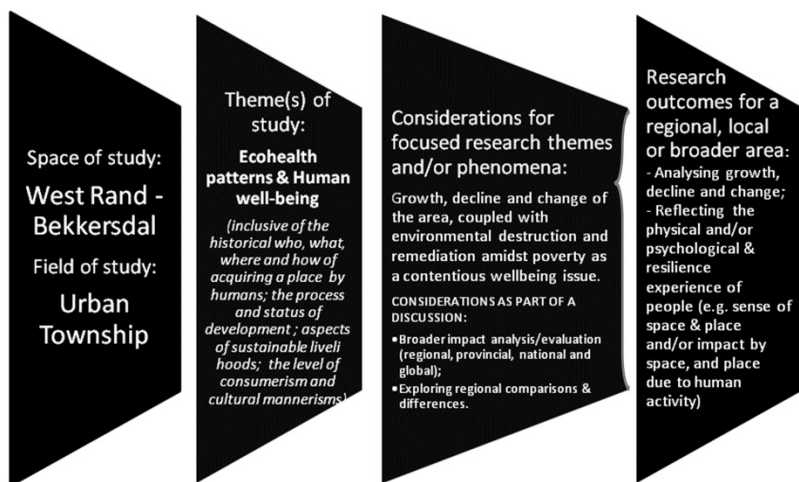
Because the regional history research as outlined forms part of a project, a historiographical reflection on regional history as practice or as a branch of history is not the main focus (although it should indeed not be ignored in postgraduate research). However, a historiographical analysis of available literature on the region and the dominant emphases will certainly be of value to map new research against past outputs. As far as the research method or approach is concerned (see last column of Table 3-1), it should by nature be a regional history, but in the IMD project regarding the Bekkersdal area, the integrative multidisciplinary focus of the research project should also be taken into account. References to research to be conducted according, for example, to a mixed methods approach may also surface to fill the research requirements of some disciplines.

The use of a micro or narrow vision of space to work towards a collective regional history research focus for Bekkersdal, one as outlined above – and inspired by some suggestions in Table 3-1 earlier – may visually feature as follows in Table 3-2.

The next section is a concise example of how to use Tables 3-1 and 3-2. By scrupulously relying on Table 3-2 as selected framework and content for doing research on Bekkersdal as space, and considered from the broader generic ideas for focus and method in Table 3-1, the value of working more constructively towards capturing the past and present of regional histories is exposed. It could also be considered as an effort to advance or renew traditional research methodologies in vaguely defined regional histories (inclusive if its micro-local features).

Because the Bekkersdal space, the timeframe and theme of study were already introduced in the section preceding Table 3-2, a discussion of the focused theme of study (namely the considerations identified so far in the research and observations with regard to ecohealth and human wellbeing tendencies in Bekkersdal) will now follow. The discussion itself will reveal preliminary efforts to contextualize – in a broader context – a part of the past and the present of this area from 1949 up to 1994. (18)

Table 3-2. An example of a research framework in a theme-specific discourse in regionally focused histories.

Space of study: **West Rand - Bekkersdal** Field of study: **Urban Township**	Theme(s) of study: **Ecohealth patterns & Human well-being** *(inclusive of the historical who, what, where and how of acquiring a place by humans; the process and status of development; aspects of sustainable livelihoods; the level of consumerism and cultural mannerisms)*	Considerations for focused research themes and/or phenomena: Growth, decline and change of the area, coupled with environmental destruction and remediation amidst poverty as a contentious wellbeing issue. CONSIDERATIONS AS PART OF A DISCUSSION: • Broader impact analysis/evaluation (regional, provincial, national and global); • Exploring regional comparisons & differences.	Research outcomes for a regional, local or broader area: - Analysing growth, decline and change; - Reflecting the physical and/or psychological & resilience experience of people (e.g. sense of space & place and/or impact by space, and place due to human activity)

Mining initiatives and colonial practices dominate direction and determine fates

In 1886 and up to the start of the South African War in 1899, the Central Witwatersrand was the main gold-producing area of the country. The East and West Rand were developed since the early years of the 20th century, ever since the large-scale gold prospecting commenced along the so-called West Wits Line in the Far West Rand from the 1930s. (19) On 5 June 1934, the first gold mine in dolomite deposit area was established by the Venterspost Gold Mining Company. Venterspost Mine came into production in October 1939, followed by Libanon in March 1949 (*State of the Union* 1958, 137–138). On the farms Venterspost, Gemsbokfontein, Libanon and Uitval, the mineral rights belonged to the British rooted New

Consolidated Gold Fields Co. They established the Company Western
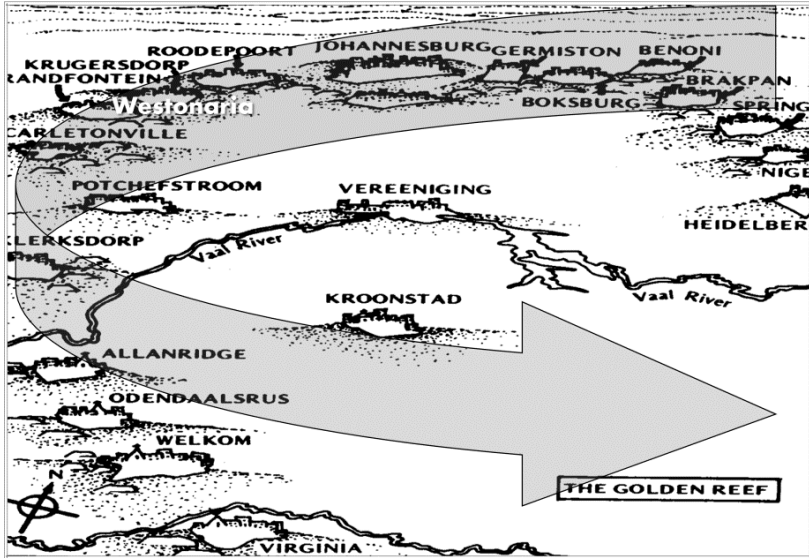Areas Limited (Galloway 1995, 5–6, 8).

Figure 3-3. The West Wits gold line in South Africa.
Source: Van Eeden 1988.

Before 1942, the mining authority Western Areas Limited took some
financial and managerial strain in order to ensure that the barren areas in
which they operated functioned reasonably. In that year, a Health
Committee under chairmanship of the mine director at Western Areas
Limited, Mr. Paul Nel, was approved by provincial authorities. Under
Nel's passionate leadership and guidance in the several committees on
which he served, the infrastructural development in the area developed
with remarkable strides. Initiatives for the development of a township for
black inhabitants were acknowledged on land made available by Western
Areas Limited and by Randfontein Estates Gold Mine. By late 1948, when
Westonaria was awarded full council status, this council gradually took
over the work of the Health Committee in the "Native [sic] Settlement",
12 years later more commonly known as Bekkersdal. The Township then
functioned by virtue of Act 25 of 1945 (NA, 1956a). This Act very much
formed part of the broader colonial mentality of the time (Myers 2008, 1–
15) of "allowing" limited to controlled land occupation according to a

Group Areas Act, close to industrial development in so-called "white" demarcated areas. (20) With regard to human settlement, the Peri-Urban Areas Health Board also paid attention to the provision of accommodation for the community in the "Native Location" [sic], based on its afore-mentioned policy stipulated in Article 40, Act 25 of 1945. In this process, a notion of strict control of movement in the heyday of apartheid was expressed (NA 1956b):

Vermy... stigting van meer swart kolle as wat absoluut moontlik is […]
Avoid... the founding of more black spots than is absolutely necessary […]
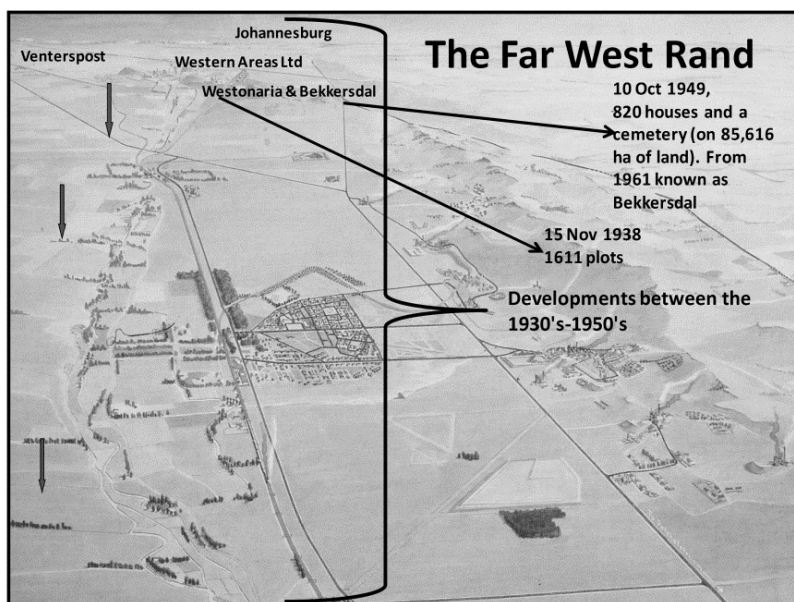

Figure 3-4. Positioning Bekkersdal in the West Wits Gold Line developments. Source: Van Eeden, 1988.

Owing to this arrangement, ways of proper local governance were also distorted because of different governing and legal systems applicable to different groups of people, thus further strengthening a growing racist society (compare Olowu and Wunsch, 2004: 32, Walker as in Buhlungu et al, 2006; Bekink, 2006; Scher as in *History of South Africa* 2014, 328–348).

Some municipalities took practical steps to lay out townships (as happened in the Krugersdorp area – the present-day Merafong municipal area), while others embarked on builder-owner schemes. Municipalities at the time lacked experience and no organization existed to which they could turn for advice (Olowu and Wunsch 2004, 32–34). Ever since the outbreak of the Second World War (1939–1945), housing insufficiency for black people deteriorated to such an extent as to create unsolvable issues by the late 1950s (*State of the Union* 1958, 102). To provide for the lack of housing, several squatter camps developed in an uncontrolled way on illegally occupied vacant land near towns or places of work (Bonner as in Brown 1991, 59–74). With no other accommodation available or permissible, it was hardly possible for the British colonially bred South African authorities to refuse squatters and squatting, for example, close to the foreign-governed gold mines. Similarly, sufficient running water and basic minimum sanitation facilities (if any) became a menace to squatters, local government and inhabitants of surrounding towns. (21) Discontent and frustration regarding living and working conditions, spirited by waves of a growing national consciousness against suppressive and destructive human rights practices (Grobler as in *History of South Africa* 2014, 374–395) were continually exploited in the years after the 1980s by politicians and politicized by groups in local areas such as Bekkersdal, as the shoe fitted (Khaba and Van Eeden 2015, 1–16).

The wellbeing status of Bekkersdal by 1994

Though it's possible to dig very deep into detail about the development of Bekkersdal in order to obtain a historically worthy perspective on the wellbeing environment of the township, space does not permit. Consequently, the township will be concisely discussed regarding particular topics for the sake of considering the regional history research methodology as suggested. It was stated earlier that ecohealth aspects related to the built-up and natural environment may direct the reason for the status of communities. Equally so, their wellbeing standing is inclusive of, for example, the financial, physical, social, emotional and psychological aspects. The list can be longer and may even include the impact of the political stand of the day (Inglehart 1997; Przeworski, et al 2003, 78–127; Moller and Saris 2001, 97–114). In the case of Bekkersdal, destructive politics and the physical environment detrimentally contributed to trigger the other features of wellbeing into negatives. The historical development recorded of Bekkersdal bears unspoken witness in this regard.

Developments

By the early 1950s, the Council apparently paid attention to housing infrastructure in Bekkersdal (building 820 houses), as well as the establishment of a beer hall. The intention was that the income generated by the beer hall would be supportive in funding other initiatives in Bekkersdal, as it was difficult to do so without sufficient funds. At the time, the population of the formal side of Bekkersdal was calculated statistically as follows (RSA NA 1957–1966):

> Black people: 4 885 (occupying 794 houses for rent built by the Westonaria municipality); Coloreds: 121 (occupying 26 houses for rent built by the Westonaria municipality).

At the time (1955), the rent for the three-roomed houses was £1 5s 0d per month (sanitation service provision and garbage removal included). A two-bucket system was in use and it was said that each house had its own latrine provided by the municipality. The daily cleaning of latrines were via the main sewer system. Garbage was removed twice weekly. Each home had a washing area as well as its own water provision. There were no standpipes or communal washing areas (RSA NA 1957–1966). In 1964, Westonaria was declared a Group Area based on the Group Areas Act (RSA NA 1964), which further reduced possibilities for expansion as most surrounding land was declared white area for the township development of Westonaria, whilst most of the land close to gold mining industries was subsequently declared unsuitable for development due to dolomitic instability (RSA NA 1988-1989).

Ten shops were also established by the town council. In this instance, the motive was to ensure the self-sufficiency of black inhabitants (compare Galloway 1995, 8–12; 155–157), yet on a temporary basis only. Central government regarded urban dwellers as people who also had other permanent settlements in the black homelands (RSA NA 1958, 102–103, 105). This was yet another aspect of the apartheid policy rooted in the "former" colonial Indirect Rule system. The Westonaria Council was also required by central government (under the National Party) to apply strict influx control measures (Galloway, 1995, 159; West Rand Times and Westrander 1959, 1).

Bekink holds the opinion that continuation of an indirect rule segregation policy by the National Party Government after 1948 also affected the tax income of the black areas because of income spent in areas declared white. Furthermore, the historical reality that the final control and management of local authorities fell under higher government institutions

is indicative of a lack of proper local autonomy (Bekink 2006, chap. 5). As a result, communities were mobilized into action against the system by the 1980s and agitators specifically targeted Black Local Authorities that imposed rent and service charges on townships to increase revenue – a policy that continually gave rise to anger in communities (Makobane 1992, 12). Occasionally, some form of hope would flare up for proper future development of the township, such as at the time of the Open Space Study conducted in 1985. In this report, commissioned by the Westonaria Community Council, the need for the development and expansion of the Township was accentuated (RSA NA 1985a):

> Due to the unsuitability of 1 024 residential sites to the west, [and] the freezing of development in 1983, there has been very little growth in recent years. Since 1983, Bekkersdal has been witnessing the growth of a squatter camp and temporary structures totaling approximately 2 900. This has been due to the natural growth of the population and the fact that there [were] no residential sites available [...]

Insufficient housing was not only a Bekkersdal problem at the time, but a national phenomenon in black residential townships (Smith 2003; Lemanski 2009, 472–484). This was the case despite the will to renew and to add value to insufficient local housing needs. Other services did not go unnoticed. In 1989, the newly elected 29-year-old mayor Kesiloe H. Shoai (probably the youngest mayor ever) with the support of four other young elected councilors and three women) vowed to aspire to provide a roof over the head of each Bekkersdal resident by correcting the "ills of former councils". Shoai also asserted that other townships on the West Rand gold reef were better provided for than Bekkersdal, and therefore urgent action was required:

> We are here to do justice and promote our township to obtain equal status with similar townships countrywide. Our primary aims are to see that justice is done to pensioners, disabled and destitute people and, most of all, squatters. Fundamentally people must be properly housed. (22)

In the course of time, growing dissatisfaction coupled with improper guardianship and an uncontrolled population increase far beyond the existing formal township boundaries, (23) together with the gradual downscaling of mining operations after decades of careless activity, created a platform for political instability with traces of anarchical resistance. Sporadic violent activities from the late 1980s up to 1993 dispelled any notions of sustainable development. (24)

Shortly before the 1994 democratic election in South Africa, the government made provision for a system of ad-hoc intergovernmental grants to channel resources to collapsing local townships and communities. These were handled by Regional Service Councils (RSCs) and Joint Services Boards (JSBs). Continual crises in local government served as the catalyst for changing the political structure in South Africa in the 1980s and early 1990s as viewed by Bekink (2006, chap. 4) (and it might also have been the triggering catalyst in 2014 with the May elections on hand – because of still lingering issues concomitant with a host of circumstances of ever-increasing complexity. See Westonaria-Bekkersdal history in the sections to follow).

The Local Government Transition Act of 1993 (LGTA) served as the first step to transform Local Governments (Bekink 2006, chap. 4) with the Local Government Negotiating Forum (LGNF) from 1993 acting as the operational body to ensure progress towards equal and acceptable services (Bekink 2006, chap. 5). Hoffman adds that when the African National Congress (ANC) came into power in South Africa in 1994, they promised an "ambitious program to expand access to public services, regardless of ability to pay, in order to redress the inequities the apartheid system [and previous systems] created". (25)

Environmental destruction

A most contentious issue currently in South Africa is the incalculably perceived impact the gold mines may have had on the built-up and the natural environment. The financial urge and determination by central government and mining companies to overcome the dolomite "threat" in the Far West Rand during the 1930s did not allow for any long-term vision. Neither was community development necessarily carefully designed (Van Eeden 2006, 204–230), as can be observed in the Bekkersdal township settlement history (RSA NA 1988–1989).

Ever since mining developments and expansions followed, areas beyond the western boundaries of the formal Bekkersdal were never regarded as being suitable for township development. However, informal settlements sprang up at a rate that left hardly any possibility to avoid the scenario from becoming increasingly chaotic. (26)

Nearly forty years later (in 1985), references in the municipal records of Westonaria made mention of "several dolomite stability reports" that had been compiled. All these reports concluded that the areas to the west of Bekkersdal were unsuitable for formal settlement development (NA, 1985b). The Director-General of Cooperation and Development in Pretoria

granted permission to the Development Council of the West Rand (managed as part Johannesburg) to upgrade Bekkersdal on land identified as suitable. In a letter, the Director-General explicitly pointed out that (RSA NA 1985c):

> Bekkersdal can be upgraded with the understanding that inhabitants must accept the risk related to development and that governing bodies must not be blamed if problems develop. Inhabitants must understand that the whole area up to a certain height is a risk, even if all necessary precautions are taken. (27)

There were some efforts years after 1994 to start diverting the stalemate built environment development of Bekkersdal to other options of land selling and development opportunities much farther away from the present day township area. The reality of a destructive and increasingly destructive environment created long-term impacts (Winde and Stoch 2010, 75–82) which the community was apparently unwilling to accept. The observation made by the ANC spokesperson (Stephen Eck) subsequent to negotiations between the squatters and the mining authority is recalled (Strachan 1993, 5):

> [...] each time the mine and the community would come close to an agreement, the move was stalled by squatters demanding items unrelated to the move...the residents had resisted, but they did not understand the danger...The mine had declared the area unsafe before the shacks were erected. The high density of residents on the land and water leaking into the ground had increased the risk [...]

Whether the community had psychologically submitted itself to a new future reality and sense of place as being the "historical" Bekkersdal, is the theme for another discussion (as examples see McKenzie 1993, 6; Strachan 1993, 5). A recent news report accentuates the complexity (Matlala and Aboobaker 2013, 8):

> Sixty-one-year-old Miriam Nofemele – a mother of four – said she was tired of living in someone's backyard. 'This is my plot. I'm not going anywhere, as you can see I am busy' [...]

Determining its immediate effects with regard to wellbeing and a yet growing financial and spatial legacy as a result (WLM 2013) may only provide more clarity in the distant future for community, government and researchers. What seem to be inevitable realities are the irreversible impact of past decisions in ways regarding regional administration, land

allocation and a forced social divide, closely knit with the creation of poverty because of wars and uncontrolled urbanization. A very important aspect of human resilience in wellbeing (if not the most important), namely education, became racialized and marginalized. Its legacy in Bekkersdal and the broader region of Westonaria display this reality in gloomy statistics. (28)

The ecohealth and wellbeing scars of a deeply rooted traditional region?

In this discussion, present-day tendencies internationally with regard to understanding and recording regional history studies were considered by briefly exposing the reader to parts of regional studies historiography (continentally, internationally and its visibility in South Africa). As proposed for regional history as a focus of research, the research methodology advances from emphasizing a very explicit geographic territory as area or space in which a theme and focused field or phenomenon forms the core of the discussion. The development of the area is explored within a very specific time frame. In the process of exposure, the history of the area – while considering broader driven processes – is not ignored. The given reality that researchers cannot escape or ignore the nationally declared regions as determined by, for example, governments, is considered in the suggested methodology. Instead, there is a necessity for researchers not to be limited to areas within affirmed regional boundaries only, but to explore broader phenomenological features even beyond such boundaries (also compare Grundlingh's idea of new social history, which fits this paradigm well. See Grundlingh ca 1993, 1–10).

The regional history approach as discussed in Chapter Three has further been shaped into a regional history studies research methodology: one that is regarded to be a developing approach to be considered as a point of departure to further renew the field of regional history studies. In the sphere of Africa's history, a refreshed focus on the continent's transregional and global history is of growing importance (Manning 2003, 361; Cooper 2001, 23–46).

By way of illustration, the Bekkersdal mining community in Westonaria – as part of the West Rand District – was used as example of a space by contemplating aspects of the suggested methodology for regional history pertaining to the ecohealth and wellbeing in the community during the period 1949 to 1994. Ever since the initial development of the township, it was indicated that the establishment of Bekkersdal in South

Africa's Union-of-Britain-heydays originally catered merely for short-term human wellbeing and industrial economic needs from mostly foreign investments, while actually being strictly fenced within the growing political apartheid regional boundaries created by colonial mentalities of the time. Though it can be speculated that the built-up environment of Bekkersdal in its early days momentarily (for approximately 20 years) served the ecohealth and wellbeing needs of the community, the period from the seventies up to 1994 was disastrous. This was because the socio-cultural needs among ordinary people, amongst others, outgrew the fixed ideologies within the political sphere. Initially (namely in the first years after establishment in 1949), the Bekkersdal township itself was sufficiently provided with the infrastructural requirements of the day, but because it was the uncontrolled expansion of the informal section of Bekkersdal that, amongst others, threatened the wellbeing of the formerly privileged. All these deeply rooted complexities contributed to transforming the community into a violent, poverty-stricken, politically occupied and socially disordered society (Khaba and Van Eeden 2015, 1–16; Rogerson 1996, 167–179). By 2011, for example, informal settlements in the Westonaria Local Municipality (inclusive of Bekkersdal) accounted for 75% of the population while a mere 25% of the population was catered for regarding formal housing (*Census Report* 2011; *State of the Environment Report* 2011).

The ecohealth status of Bekkersdal within the natural environment first and foremost exposed the vulnerability and temporary nature of mainly foreign established and controlled economic activities and human settlement patterns in especially the western areas outside the formal Bekkersdal. Poverty, low education levels and a community characterized by declining economic activity due to the present day downscaling of gold mining operations have had a detrimental impact on the extended Bekkersdal community as well as the broader West Rand Municipal Region of Gauteng. In 2013, this region was regarded as the poorest region contributing to the Gross Domestic Product of South Africa's richest province, namely Gauteng. (29)

By discussing the nature of the ecohealth and wellbeing of Bekkersdal as an example of a micro-regional space for studying a theme in regional history, the intention was mainly to utilize this space as an example to expose the applicability of the suggested framework (Table 3-1) for considering research themes (as in Table 3-2). It was argued that a loose or sloppy way of addressing research themes in studies of a micro-and-macro-regional history nature will not necessarily contribute to a broader regional studies research process of understanding. A more epistemologically

structured approach in regional history research is required to assist the historian (and the experts of disciplines that may be recruited for expertise input in more integrative regional studies projects). Core themes related to regions and regional developments could be defined and brought together collectively to provide a more encompassing, well-researched (inclusive of national and global) regional history studies imprint of a territorially distinct space.

It can also be reasoned that the contribution to regional history studies by historians in individual countries would optimally serve research ventures from a micro engagement to space towards the macro-phenomenological enquiries. This constitutes a way in which historians could safeguard themselves against being derailed in a "purely" national history in which transnational and global roots (though not directly visible) have an indirect impact on lives. The requirement for more scientific professionalism and growth by historians to understand human developments and contributions in regions is long overdue.

CHAPTER FOUR

A PRELUDE TO WHOLESALE REFORM: THE HISTORY OF REGIONAL GOVERNANCE AND PLANNING IN AUCKLAND, NEW ZEALAND, 1840–2010

MARK N. DAVEY

New Zealand covers a land area greater than Britain and similar to the size of Japan. It comprises two main islands, the North Island and South Island, and supports a population of 4.5 million people. As a former colony of the British Empire, New Zealand was settled in the early 1800s. Auckland, now New Zealand's largest region by population, was settled by the colonists after 1840, and for 25 years was the capital of New Zealand. The governance structures for Auckland and the nation as a whole are based on the British Westminster system of democracy. Similarly the country's legal doctrines are derived from the English common law system. As such, many of the statutes are of British origin: for example, until 1991 the planning system was an adaptation of the British Town Planning Act.

More than in other developed nations, control of expenditure, decision making and the provision of services is highly centralized in New Zealand. In this regard, central government spends nine dollars per annum for every one dollar that local government spends. Furthermore, local government is provided with its power and authority through legislation set by the central government (a unicameral parliament) and results in the form, roles, and responsibilities of local government being at the whim of politicians of the day. However, the legislation does devolve to local government in Auckland, and to other city and regional councils throughout the country, the authority to rate, set policy, plan, and provide specific services to their respective regions. Regardless, the funding imbalance between central government and local government has an overwhelming effect on the

functions which local government can feasibly undertake and on their overall role in regional development.

Auckland has become unique in the New Zealand context. The city is situated on a narrow isthmus in the upper North Island (refer Figure 1). Auckland's size and geographic location has a significant impact on the development, investment and migration patterns of the nation. The region contributes over one third of the country's GDP, comprises over 1.5 million people, and a significant number of central government politicians usually come from the region (via a Mixed Member Proportional voting system). Auckland's economy is largely based on service provision but yet it is New Zealand's gateway to global markets. The Ports of Auckland handle 37 per cent of all import and export trade, and 70 per cent or all visitors to New Zealand pass through Auckland International Airport. Critical issues have stemmed from Auckland's unique characteristics; they have challenged the governance and planning frameworks throughout the region's history as well as how central government responds to Auckland.

Figure 1. The Auckland Region
Source: Adapted from Davey 2014.

In the beginning

Auckland was founded in 1840 by Governor Hobson following the signing of the Treaty of Waitangi (Grainger 1953) with the Maori (the indigenous people) reported to total no more than 800 scattered across the entire region and islands and very few on the shores of the Waitemata Harbour where the new city would emerge (Bassett 2013; Stone 2001). In 1841 Auckland became the capital of New Zealand and steady population growth occurred, with the population reaching nearly 3,500 by 1851 (Bassett 2013). In 1865, Auckland relinquished its title as the capital city to Wellington because the latter was regarded as a more central destination given that gold rushes in the South Island had seen a rapid increase in the southern population.

The population increase in Auckland during the 1840s and 1850s led to the beginning of formal governance arrangements in the region (Royal Commission of Inquiry into Auckland Governance 2009, 114). Auckland was divided into administrative units which oversaw local works such as the construction of roads and bridges. By the mid-1840s what was briefly called the New Ulster Government in the north was carrying out some rather basic public works. This lasted until 1851 when the Governor of New Zealand, Sir George Grey, granted self-governing powers to the growing township (Bush 1971, 33). The first attempt to establish an Auckland city council at this time initially failed due to a lack of legislative frameworks, and no rating base or candidates for office (Bassett 2013, Bush 2008). In 1853 a second attempt was made by the Auckland Provincial Council. Again, this failed largely due to conflicting personalities and community resistance to the necessary levies to fund such an organization (Bush 2008, 4).

Eventually after several petitions, the Auckland City Council was established in 1871 under the Municipal Corporations Act 1867 to deal with local issues like roads and sanitation (Bassett, 2013). Through legislation in the 1850s the newly formed Auckland Provincial Council had been granted wide responsibility for the provision of policing, schools and hospitals. Initially the Auckland Council's jurisdiction was confined to a small area of 623 acres (Bassett, 2013). It would gradually expand and today Auckland Council covers 5,600 square miles (*Te Ara* 2013a).

In 1876 the administrative face of New Zealand changed when the six provinces across the country were abolished. This meant that most of the roles of the former Auckland Provincial Council were devolved to counties, municipalities and roads boards in the Auckland region (Bush 2008). This gifted a significant amount of additional authority to the

recently formed Auckland City Council which for its first five years had done little. The disestablishment of provincial councils around New Zealand removed a middle layer of governance in New Zealand. Henceforth there was only central government and local government.

As immigration increased and land settlement proceeded apace, the number of local authorities mushroomed. By 1895 there were 600 authorities serving a population of approximately 700,000 across New Zealand (Bassett 1997). The small villages within Auckland grew into contiguous suburbs (Chalmers and Hall 1989) which became known as the City of Auckland and its outlying highway districts. These authorities co-existed with a collection of special purpose boards known as 'ad hocs' which delivered specific services. These boards were not restricted by the historic and often arbitrarily devised administrative boundaries, meaning that service provision could overlap the district boundaries. This caused problems for the efficient delivery of infrastructural services like roading, water reticulation, sanitation services and fire prevention. There was a "complex net of local government which significantly limited coordinated planning on a metropolitan scale" (Chalmers and Hall 1989, 85). Auckland's governance throughout the late 19th century and early 20th century was typified by the territorial or special purpose boards, each managing a particular service or an element of infrastructure (*LGNZ History* 2011; *Local Government Timeline* 2013; Royal Commission of Inquiry into Auckland Governance 2008; *Te Ara* 2013a). The predominant issue with these arrangements which continued through most of the 20th century was their small size, the breadth of their functions, and the limitations on their funding and their area of authority (Bassett 2013; Bush 2008).

Over this time the population and land area of the Auckland City Council was growing, and discontent arose amongst the smaller boards and boroughs in relation to resourcing (Bassett 2013). Between 1905 and 1925 successive mayors of Auckland City campaigned for amalgamation; as a result, a notion of regionalism first gradually emerged. In 1928 the idea of a new single metropolitan regional body was formally proposed, but was rejected (Bassett 2013). This could have offered a solution to the piecemeal nature of governance in the region. Instead, it was another 35 years before a wholly regional structure emerged. Meanwhile, wider Auckland experienced, "rampant urban expansion" with the population reaching 51,000 in 1891, 62,000 in 1901, and 102,000 in 1911 (Bush 2008, 8). This placed significant pressure on infrastructure provision within the Auckland City metropolitan area; there was an "uphill struggle dealing with burgeoning urban problems" (Bush 2008, 5). The establishment of

some form of regional or metropolitan body was the obvious solution. However these efforts through government bills and then the work of the Local Government Commission in the 1940s struggled to achieve amalgamation of small authorities and the creation of a regional body (*Te Ara* 2013a, 11). Despite this some small roads boards did amalgamate with the Auckland City Council up until 1928, and some of the districts cooperated under duress with the funding of the War Memorial Museum. Most agreed to buy bulk water and to cooperate over tram routes.

Because of the growth in Auckland during its first 50 years, in the early 1900s some thought was given by Auckland's local politicians to the desirability of planning. Arthur Myers, Mayor of Auckland 1905–1909 and then MP for Auckland East (1910–1921) was a fervent advocate of town planning. Issues like overcrowding, poor provision of core services, unsanitary living conditions, and competing and uncomplimentary land uses needed to be addressed. In 1912, and then in 1919 conferences at the national level discussed the need for town planning. In 1926 the Town Planning Act was passed by Prime Minister Gordon Coates' government. Municipalities were to produce plans which were to be submitted to the government for approval. Progress was slow. As late as 1953, only 17 out of more than 100 councils around New Zealand had an approved plan (Bassett and Malpass 2013). Regional plans were still optional at this time. Few were discussed, and none adopted prior to World War Two (Bassett 2013, Palmer 1984).

The Post War Period – an acknowledgement of a problem

The returning service men and women fuelled a post war population boom in Auckland, resulting in the rapid expansion of local government and several amalgamations with the largest local authority, the Auckland City Council. The notion of regional governance and planning gained adherents but it was a long struggle against petty parochial interests.

The desire for some form of regional governance began in earnest in mid-1954 when a new mayor of Auckland City Council, John Luxford, proposed a two-tier local governance system (Bush 2008). This led to the establishment of the Metropolitan Council as a tier that would sit above the Auckland City Council and the smaller boroughs, roads boards and ad hocs within the region. Further investigations initially lacked adequate resourcing, and by October 1959 another Mayor of Auckland City Council, Dove-Myer Robinson, stepped up the pressure for regional governance (Bush 1971 2008).

In March 1961, the Auckland Regional Authority Establishment Committee led by Mayor Robinson reported back to the other Auckland local authorities and to central government, identifying regional planning as one of the key priorities for a successful region (Bush 2008). At the same time central government's Local Bills Committee decided to enquire into whether the current form of local government was capable of meeting the needs of Auckland's rapidly growing population (*Te Ara* 2013b). These enquiries led to the introduction of an Auckland Bill in 1962 which proposed the establishment of a regional authority in Auckland covering the 32 municipalities. The Bill proposed that the new authority would be the regional planning authority for Auckland. Furthermore, the regional authority would also carry out regional works and services and, in the process, assume the functions of many special-purpose authorities in the region (*Te Ara* 2013a, 1). This proposal was specifically for Auckland, an attempt to contend with its extraordinary issues brought about by above-average population growth, inadequate governance, and lack of forward planning.

After a lengthy late-night debate the Bill was passed in 1963. It resulted in the establishment of the Auckland Regional Authority (ARA). For the first time since 1876 a three tier governance arrangement now existed in Auckland. The ARA was designated as the body to carry out regional functions although unfortunately the scope of the functions was significantly scaled back from what was envisaged in the first Bill. The ARA became the first formal institutional arrangement for the administration of the Auckland region (Bassett 2013, Bush 2008, Chalmers and Hall 1989). The establishment of the ARA created not only an organization tasked with region-wide functions (a logical approach for the provision of services), but also an institution for the development and implementation of regional policy and growth management never experienced on this scale in New Zealand before.

The establishment of the ARA combined with the Robinson mayoralty marked a time when significant infrastructure investment was made to meet population growth and demand – in 1965 the population of Auckland surpassed 500,000 (Auckland Regional Council 2010). Major infrastructure developments arising during the 1950s and 1960s included the Auckland International Airport, the Mangere Sewage Treatment Plant, Cossey's Creek and Hunua water dams, the Auckland Harbour Bridge, and an expanding motorway system.

Throughout the 1960s and 1970s the ARA matured as a regional governing body (Bush 2008). One of its key functions was to undertake regional planning in accordance with the Town and Country Planning Act

(1953). However, what was achieved from this was argued to be "no more than [an] outline [of] vague policies and the broadest of strategies" (Town and Country Planning Act Review Committee 1973, 5–7). The result of this was that the key planning issues at a regional level, such as the relationship between land use intensity and the provision of physical infrastructure, services, and amenities were "seldom […] dealt with successfully or even recognized as objectives" (Town and Country Planning Act Review Committee 1973, 7).

Furthermore, the potential benefits offered by a regional authority to manage growth and development were impeded by the large number of territorial authorities which sat below it, and by their politicians. There was no restriction on locally elected politicians at the territorial level to also run for election to the ARA. The result was that many mayors of territorial councils managed to get elected to the ARA as well, where they usually waged parochial battles to the detriment of a regional perspective (Bassett 2013). Similar parochialism undermined the work between 1945 and 1984 of several Local Government Commissions which were empowered by central government to recommend amalgamations within the region. All of them failed because central governments allowed themselves to be frightened off by the threat of an electoral backlash at the central government level (Bassett 1997). In the case of the ARA this meant that regional policy and its implementation were restrained by local interests that ran contrary to the regional interest. One example of this was the public ownership of landfills in the region. The reluctance of territorial interests to enable the acquisition of new landfill sites led in part to the private sector involvement in waste disposal in the region that now exists (*Auckland Waste Stocktake & Strategic Assessment* 2009).

Local politicking often restrained progress in Auckland. For example, through the 1970s and 1980s, when inflation was high, local politicians strove to keep rate increases lower than the rate of inflation, culminating in a reduction in council revenues, less spending, and neglect of Auckland's infrastructure system. The introduction of the Town and Country Planning Act (1977) which required ministerial 'sign-off' on regional planning schemes and provided for the Crown to contribute towards the cost of regional planning and development, did little to improve the Auckland scene in what were nationally cash-strapped times (Palmer 1984).

A regional approach to the problem

Up until 2010 the most significant event in the history of governance and planning in Auckland came by way of the 1989 reforms conducted under

the Local Government Act (1974). This led to the amalgamation of 28 territorial local authorities across the region into eight, and the abolition of many ad hoc authorities. The Auckland Regional Authority became the Auckland Regional Council (ARC) with wider powers and a much larger resource base. Important assets like Auckland's largest bus company, the Yellow Bus Company, the Ports of Auckland and their waterfront land originally owned by the Auckland Harbour Board, were all placed under the ARC in 1989.

The local government changes, many of them envisaged by governments nearly a century earlier came as part of a significant wave of public and private sector reforms that occurred in New Zealand after 1984. The changes were driven by the objectives of improved economic management and efficiency, greater accountability, transparency, and market contestability (Easton 1989, Rouse and Putterill 2005, Scott 1995). The internecine warfare and inefficient governance of Auckland could not continue in the new economic environment following the market-led reforms.

Changes to the Local Government Act that passed in May 1989 enabled the Local Government Commission (LGC) to reorganize the functions and boundaries of all local authorities in New Zealand. The LGC reduced 817 units of local government to 93 across the country (Bassett 1997, 243–244). Some commentators at the time questioned why 'one big city' for the whole region was not enacted (*New Zealand Herald* 1988). Earlier, in 1987 the Auckland City Council (ACC), the most populous of the territorial authorities in the region, had pushed for unification but failed to gain support from the other local authorities. The LGC decided on seven territorial and one regional authority (ARC). They were enacted on 9 June 1989 by Order in Council (Bassett 1997, 244).

The 1989 reforms to local government saw 43 authorities in Auckland (28 territorial local authorities and several smaller ad hoc authorities) reduced to just eight (Royal Commission of Inquiry into Auckland Governance 2009). The changes sought to reduce the high levels of autonomy and poor integration of planning and decision-making functions across the region. These governance arrangements remained in place until their disestablishment on November 1, 2010. All eight authorities in Auckland held planning duties mandated under the Resource Management Act (1991). The reforms solidified the role of regionalism, and the new Auckland Regional Council (ARC) was tasked with investment and service delivery functions. This was an evolutionary move towards one single authority for all of Auckland.

Shortly after this reorganization of local government took place, the Town and Country Planning Act (1977) was repealed and the Resource

Management Act (1991) enacted in its place. This marked a significant change in how local and regional planning in New Zealand was undertaken. It signaled a departure from the British-derived legislation and pioneered an effects-based approach to environmental planning that was predicated on environmental sustainability (Memon and Perkins 1993, Memon 1991; Memon and Gleeson 1995). However, like the old Town and Country Planning Act (1977), the Resource Management Act (1991) still required planning documents to be prepared by local authorities. The Act included a requirement for regional councils, in this case the ARC, to develop regional policy statements (which replaced the regional planning schemes). The intention was that these would provide an overarching policy framework to inform the lower level district plans that were developed and implemented by the four city and three district councils. In practice, the regional policy statements were far more permissive than the previous regional plans and focused on the bio-physical environment rather than the management of growth by way of land use and infrastructure sequencing and provision. This environmental effects-based premise has delivered poorly in respect to assisting the future orientated role of town planning particularly in a country where over 87 per cent of the population is urbanized (Beattie 2013; Davey 2014). The first generation plans under this new legislation gradually came into effect during the 1990s.

At a broader level the 1989 governance reforms in Auckland marked some centralization of power and the creation of new economies of scale favoring those units of local government that held the majority of the rating base (Bush 1990, 2008; Jayne 1989; Rouse and Putterill 2005). However, while the 1989 reforms consolidated the centers of competing power, internal power struggles between local authorities (to the detriment of regionalism) continued, albeit with fewer players (Bassett 2013).

The Auckland Regional Council and planning

The creation of the ARC held great promise for regionalism in Auckland. However, to the region's detriment between 1989 and 2010, the ARC experienced several major shifts in how it planned and delivered regional services. In 1992, only three years after its formation, and just as signs were emerging that the region now had the authority and wherewithal to manage region-wide growth and development, the then Minister of Local Government, Warren Cooper, stripped it of many of its service delivery functions, removed one billion dollars of assets from it, and restricted the ARC's authority to regulatory planning functions and transport, similar to

the ARA which it had replaced (Bassett 2013, Bush 2008). It was clear that the Minister who hailed from the provincial South Island did not appreciate the benefits of regionalism to Auckland, and thought of regional councils as an unnecessary tier of government (Bassett 2013). The immediate impetus for change was to enable improved management of the assets and their sell-down, however this never eventuated (Bush, 2008). The result undid some of the work of the 1989 reforms which created for the first time since 1840, a body tasked with the region-wide issues of planning, investment, and development. The hopes of the ARC evolving into Auckland's paramount council were quashed.

The 1992 changes caused a split in service and regulatory functions. A new Auckland Regional Services Trust (ARST) was created by the 1992 legislation to hold the assets that had been stripped off the ARC. That regional body no longer possessed the income that had been bestowed upon it in 1989. The changes led eventually to a realization that some form of re-integration between these two organizations had to occur if regionalism was to progress. ARST refused the asset sales intended by central government and instead transformed them into financially viable entities. These assets changed hands twice between 1992 and 2010. First in October 1998, they were transferred to a new body called Infrastructure Auckland over which the seven territorial authorities were able to exercise considerable power. They regarded its assets as their milch cow. It was at this point that the highly profitable EnviroWaste Services Limited, owned by Infrastructure Auckland, which looked after refuse collection and owned two major landfills in the region, was sold.

In July 2004 the ARC's constant requests to government for more funds for public transport led Helen Clark's Labour government to switch the assets of Infrastructure Auckland half way back to the ARC. A new intermediary body called Auckland Regional Holdings (ARH), owned by the ARC, managed the regional assets with the profits going to the ARC. One year later the Ports of Auckland, a listed company 80% owned by ARH, was delisted and the remaining 20% that was privately owned acquired by ARC. The goal was for ARH to be able more freely to develop the Auckland waterfront. By April 2010 ARH reportedly held $1 billion worth of assets and in the previous financial year had contributed net revenue of $31.7 million (Smith 2010) to the ARC. Even with the unimpeded revenue stream now coming to the ARC the money was insufficient to fund the responsibility imposed on it for running regional public transport. What exacerbated the ARC's problem was that the Auckland region was the fastest growing area in New Zealand with 76 per cent of the country's population increase between 1991 and 2006

(Auckland Regional Council 2010). Moreover, the old parochialism that had existed since early in the Twentieth Century where outlying areas were reluctant to contribute financially to regional services like the Auckland Zoo, the Auckland Art Gallery, the Maritime Museum and the Auckland Philharmonic Orchestra had not been resolved (Bassett 2013).

Although lacking legal status, a Mayoral Forum and a Regional CEO's committee was established in the mid-1990s and it sought to provide a mechanism for better integration of services (Hucker 2000, 2). In July 1998 both gained legal standing resulting in the establishment of the Auckland Regional Growth Forum (ARGF) and the Auckland Regional Land Transport Committee (ARLTC) (Hobbs 2000). These bodies met regularly and produced the Auckland Regional Growth Strategy 2050 (1999) and the Auckland Regional Land Transport Strategy (Auckland Regional Council, 1999a). These documents marked important planning milestones in the region: they were the first formal collaborative regional planning exercises across the region that had legal standing and multi-stakeholder buy-in (Auckland Regional Council 2010).

The Auckland Regional Growth Strategy 2050 (ARGS) (1999) was portrayed as a unique, and initially non-statutory, planning approach in New Zealand. It was tasked with setting a vision for how the region would accommodate population growth, provide infrastructure and manage the associated environmental impacts over 50 years (*Auckland Sustainability Framework* 2007, 4). The ARGS 2050 took a broad, visionary approach. As noted by the Office of the Minister for the Environment, it viewed regional issues in an integrated manner and was written in collaboration with the seven Auckland territorial bodies, thereby providing a concept for how growth would be managed across the region (2009, 5).

Despite a strong mandate for the integration of land use and transport policies by the ARGF the Growth Strategy by its own evaluation in 2007 had failed to deliver (*Growing Smarter* 2007). Some of the key barriers to successful implementation included: tools available to allow comprehensive redevelopment were inadequate; there was uncertainty about the sequencing of growth; there was a hands-off, high cost, and time consuming regulatory regime; poor market uptake of high density development opportunities; poor infrastructure provision to support intensification mainly due to lack of funding; limited alignment of policy, funding and implementation across the various councils, central government and private developers; unplanned growth in the rural and coastal areas; poor community support for the management of growth; and lack of up-to-date information on growth, delivery times and infrastructure plans (*Growing Smarter* 2007. 5–7).

These perceived weaknesses were later reiterated by the Office of the Minister for the Environment (2009) which cited the "weak legal relationship between the ARGS and other plans, including RMA plans, funding plans and other plans" (p.6) to deliver regional services in an integrated manner. The poor legal relationship stemmed from the weak wording of the legislation in both the Local Government Act (1974, 2002) and the Resource Management Act (1991). As a result the legislative mandates lacked sufficient strength to require the content of district plans (land use codes and ordinances) to adhere to the direction as set down in the Auckland Regional Growth Strategy 2050.

A second regional planning document came in the form of the Auckland Regional Policy Statement 1999 (ARPS). The existence of ARPS, unlike the ARGS 2050, was required under the Resource Management Act (1991). It was first notified in May 1994 but took until August 1999 to become operative on account of legal disputes predominantly in relation to the use of the Metropolitan Urban Limits (first made possible under the Town and Country Planning Act 1977) as an urban growth management tool. The aim of the ARPS was to achieve

> integrated management of its natural and physical resources" within the Auckland region and to "maintain a quality environment… and at the same time, maintain and enhance opportunities for the region's future growth. (Auckland Regional Council 1999b, 5)

The Resource Management Act (1991) required that regional and district plans must not be inconsistent with the regional policy statement. Again, because of the wording, this resulted in varying levels of 'consistency' between the regional plans and district plans. This became a matter of legal interpretation and was highly contestable (Berke, Backhurst, Laurian, Day, Crawford, Erickson, Dixon 2006; Laurian, Day, Berke, Ericksen, Backhurst, Crawford, Dixon 2004).

A private sector response to Auckland's woes

Inadequate regional governance, planning, and long-term investment eventually began to show in Auckland. It was typified by the 1994 water crises, the electricity crisis of 1998 (BBC News 1998, *Te Ara* 2013a), growing motorway congestion, and the conglomeration of state housing on peripheral areas (leading to significant spatially intense social deprivation issues).

Some key private sector stakeholders in Auckland had been observing what was occurring in respect to population growth and economic

performance along with the regional governance and planning woes. In 2000 a group of these private sector stakeholders gathered in Auckland and formed a trust called Competitive Auckland (McDermott 2008). They wanted to ensure Auckland's competitive advantage was maintained and that economic development was enhanced. Its members encapsulated these aims by championing the need for "a 'world-class' city" (McDermott 2008, 7).

The Competitive Auckland Trust later formed a committee to further their interests by taking a partnering and advocacy role. Their aim was to focus on the regulatory and infrastructure performance of the local authorities in Auckland, and to advocate regional approaches to economic planning and development that would target particular projects. From this group the Auckland Regional Economic Development Strategic Leadership Group (AREDSLG) was established in late 2001. It was to be an informal coalition between Competitive Auckland, district, city and regional council, Maori, education sectors and other stakeholders. It received its funding from local authorities and Industry New Zealand following a model reflecting that of the Auckland Regional Growth Forum: a group comprising key stakeholders across Auckland strategizing and bringing about positive change (McDermott 2008). As can be seen, such was the irritation with the status quo that a profusion of organizations had sprung up with governance reform as their expressed or implied objective.

In October 2002 the AREDSLG released the Auckland Regional Economic Development Strategy (AREDS). The strategy was a collaborative effort between stakeholders in Auckland signaling that: "This is where we want to go; these are the issues that need to be addressed" (*Auckland Regional Economic Development Strategy* 2002, 2). However, internal governance issues relating to the group's legitimacy, the informal relationships and a lack of buy-in regarding funding and implementation led to the failure of both the group and its strategy. However, the establishment of the group served to highlight the high-level of private sector stakeholder concern surrounding Auckland issues and the need to resolve them at a time of unprecedented growth and development. Parochialism kept winning at the expense of regional cooperation.

The attempt by the AREDSLG and the production of the AREDS (2002) was not in vain: it alerted cabinet ministers, many of them Aucklanders, to the seriousness of regional issues. Central government realized that "a whole-of-government approach [was] essential for the Auckland region to achieve its economic potential" (Tizard 2002, 1) and that without changes these plans were never likely to be implemented. Central government coercion was required.

Local Government Act 2002 reforms

In 1999 a new centre-left Labour administration came to power. It was led by an Auckland MP, Helen Clark, who had taken an interest in local government throughout her life. Her government was more ready to acknowledge the issues facing Auckland and realized that central government leadership was necessary given the scale of the issues and challenges facing the region. First, the administration lifted central government investment in Auckland's infrastructure (Auckland Regional Council 2010). Second, it addressed local governance through the enactment of the Local Government Act (2002). The focus of the new Act that replaced the old and outdated 1974 legislation was on sustainable development, inter-generational responsibilities, and the four community well-beings: social, economic, environmental and cultural. It provided local authorities with the powers of general competence and encouraged long-term planning. Councils were exhorted to work together more collaboratively and with central government (Guerin 2002; *Towards better local regulation* 2012). Like so many local government and planning initiatives in New Zealand, these ideas came from the third-way policies, devolution and ideas about spatial planning current in the UK at the time.

Craig (2004, 2006) argues that while the new Act broadened the roles and responsibilities of local authorities in Auckland it did not address the real issues. The cost of the new initiatives undertaken by councils led to an average annual rates increase of 6.8 per cent across New Zealand between 2002 and 2012 (*Better Local Government* 2012; Smith 2012). This caused considerable public unease given that inflation was running at a considerably lower rate. Part of the problem was that through the Mayoral Forum, the government advocated increased spending by local authorities for initiatives in the region. While central government itself was now also contributing more money than it had done in past it wanted a more secure platform for coordination to occur, a sign that Bassett (2013) interpreted as a hint that further amalgamation could be in the offing.

Further tinkering – 2004 Local Government Act amendments

To provide greater coordination the Local Government Act 2002 was followed two years later by the Local Government (Auckland) Amendment Act (2004). It made two key changes to the governance and planning within the Auckland region. First, it required "[…] the integration of transport and land use planning throughout the region" (Bell

Gully 2010, 1) and, second, it reinforced the ARC's role in providing regional and strategic oversight by requiring local authorities to adhere to the region's strategies and plans (McDermott 2008). These changes meant that the district plans were now required to 'give effect' to the plans that sat above them, in theory strengthening the hierarchical structure of governance (Batistich and Jungen 2010; Carruthers 2011).

The intent was for the ARC to produce big-picture policy, (the Auckland Regional Growth Strategy 2050 and the Auckland Regional Policy Statement), and for the territorial authorities to act in accordance with these. Prior to the enactment of the Local Government (Auckland) Amendment Act (2004) and the Resource Management Amendment Act (2005) there was no requirement for other planning documents to give effect to the Auckland Regional Growth Strategy 2050 (1999), it was purely voluntary. The 2004 changes reduced the autonomy of the territorial authorities to decide what could be contained within their district plans: instead they were required to be accountable to regional planning policies and to give effect to these in their district plans (McDermott 2008).

It has since been argued that the Local Government (Auckland) Amendment Act (2004) was not successful in achieving integration and alignment between local plans and region-wide strategy as a result of two factors (Bell Gully 2010); first, the litigious and time consuming district plan change process in New Zealand weakened the ability to alter statutory plans; second, the reluctance on the part of the local authorities themselves to adopt, in entirety, the strategic direction set by the Auckland Regional Council. Thus by dragging their feet the democratically elected councilors in the territorials and the planners, discredited efforts to ensure better regional cooperation, in much the same way that the 28 pre 1989 bodies had done. Petty politics kept trumping regionalism.

The Local Government (Auckland) Amendment Act (2004) also dealt with the reorganization of the planning, funding, and delivery of passenger-transport services in Auckland. This led to the establishment of the Auckland Regional Transport Authority (Bassett 2013). Its direction was supposed to come from the Auckland Regional Growth Strategy 2050 (1999). Whilst increased government subsidies on top of the money now restored to the ARC by legislation assisted with the funding of public transport, rivalries between the territorial authorities and the ARC continued. Waitakere City Council and Auckland City Council invested heavily in rail, North Shore City Council in a northern busway and Manukau City Council in motorways. The 2004 reform demonstrated that tinkering with the existing regulatory planning system was not sufficient

to expedite the integration of land use and transport functions across the region.

These issues continued to occur and were again poignantly illustrated through the negotiations and disputes over waterfront land ownership and redevelopment for the hosting of the Americas Cup in 2000 and 2003, and later the stadium debacle in 2006 over where to locate a venue for New Zealand's hosting of the 2011 Rugby World Cup final (Bassett 2013). In the latter, the New Zealand Rugby Union assumed that Eden Park in Auckland would be the stadium to host the final and that the local authorities in Auckland would contribute towards its upgrade and associated transport improvement costs. Central government would pick up any shortfall. However, due to over spending and lack of budget by local authorities few, including the ARC, were in a position to contribute the necessary funds (Orsman 2006). Central government then suggested as an alternative, given the rising cost of retrofitting Eden Park and associated infrastructure, including its suburban location, that a brand new waterfront stadium was a viable option.

To central government and the Auckland Councils' dissatisfaction, the ARC refused to relinquish the two Ports of Auckland Limited container wharves which would be required (wholly owned by ARH which was in turn owned by the ARC), citing that 20 per cent of all jobs in the region depend on the port and that no remuneration by the territorial local authorities was on offer to account for the loss in earnings by the ports (Bassett 2013). The situation turned hostile between the ARC, central government and the territorial local authorities in Auckland. The mayors of the four city councils made calls to the Prime Minister for the ARC to be disbanded on the grounds of its inability to provide regional leadership (Bassett 2013). The lack of funds also prompted central government to appoint a commission of inquiry in late 2006 into possible additional sources of local government revenue amid ballooning rates bills because of the overspending councils (Rudman 2006).

The One Plan approach

The problems of too much planning and too little implementation in the Auckland region remained during the 2000s, however central government politicians in Wellington were becoming far more cognizant of the issues that Auckland faced and open to the need for reform in Auckland (O'Sullivan 2007a). During this time the Auckland region continued to experience rapid growth at a rate of 2.3 per cent per annum (*Government*

at a Glance 2011), considerably higher than comparable North American and Australian cities were experiencing at that time.

The failure of the AREDSLG to implement the Auckland Regional Economic Development Strategy led to the ARC forming a standing committee called the Auckland Region Economic Development Forum (AREDF) which involved all the councils in the region, business, tangata whenua (indigenous people) and other interest groups (McDermott 2008, 366). Set up on July 1 2005 and tasked with the stewardship, implementation, monitoring and review of the AREDS, the AREDF developed an implementation plan for the Auckland Regional Economic Development Strategy called the Metro Project Action Plan. This was released in October, 2006 (Le Heron and McDermott 2008). From this a set of recommendations emerged centered on the development of a One Plan tasked with implementation and options for altering the governance arrangements in Auckland to ensure effective implementation. This signaled the start of formal discussions about governance reform in Auckland.

There were two governance options presented in this report: first, a stronger regional authority (a Greater Auckland Council) and second, joint powers between the seven local authorities and the Auckland Regional Council with binding decision-making responsibility. This was met with varying levels of agreement by the mayors and councilors of the seven territorial local authorities; again they were reluctant to relinquish any power to another entity (*Strengthening Auckland's Regional Governance* 2007, 3). Whilst deliberations occurred, implementation stalled (O'Sullivan 2007b). In the end, the first option (a greater Auckland Council) was agreed upon in principle by the seven territorial local authorities plus the ARC. A Greater Auckland Council would take responsibility for implementing the One Plan. This was in part driven by pressure from the Prime Minister and her office over the frustration that a waterfront stadium could not be agreed to at the local level.

In July 2007 central government endorsed recommendations for the development of the One Plan and the establishment of the Auckland Regional Sustainability Development Forum (2008). The fact that central government bought-in to the project was a significant achievement. It was set up on 24 September 2007 as a standing committee of the Auckland Regional Council: it was described as a "collaborative political body comprising representatives from central, regional and local government" (Auckland Regional Sustainability Development Forum 2008, 1). Constituted as a "successor to the Regional Growth Forum", its task was

to "take a leadership role during the emergence of Auckland's One Plan" (McDermott 2008, 10).

Whilst the relationships borne from this new forum were described as an "unprecedented partnership between local and central government, with a commitment to coordinated and integrated planning and implementation across the region", (Hewison 2008, 20) change in Auckland's governance structure remained elusive. The Prime Minister could still not get the local authorities to agree on a suitable governance structure for Auckland. The aim of the One Plan was about "delivering better on existing decisions and commitments and setting a clear direction for how the region plans to achieve its aspirations for sustainable development" (*One Plan for the Auckland Region* 2008, 1). There was mounting community pressure "to turn the region's strategies into action and to bring an improved regional focus to decision-making" (*One Plan for the Auckland Region* 2008, 1). The Auckland Regional Sustainability Development Forum achieved higher levels of engagement and collaboration with the eight local authorities and key central government agencies than previous forums.

The commitment given to the One Plan, adopted by the Auckland Regional Council on October 28, 2008, signaled a determination to move beyond parochialism and previous failures. Despite these efforts, central government was becoming impatient. Buoyed by continued private sector disdain and lobbying at the lack of progress being made to rectify the shortcomings of governance in the region, and before the release of the One Plan, the then Minister of Local Government announced on October 30 2007 that there would be a Royal Commission of Inquiry into Auckland Governance (*New Zealand Herald* 2007). The purpose of the inquiry was to identify the most appropriate long-term governance arrangements for Auckland to provide a template for forward advancement (*Royal Commission of Inquiry into Auckland Governance* 2007). This approach offered the government a degree of moral authority and relieved them of potential backlash (O'Sullivan 2007c). By the time the Commission had undertaken its inquiry and presented its findings (initially scheduled for December 1 2008 but not released until March 2009) a new Center-right National-led government had been elected.

The inquiry offered the new Prime Minister and Cabinet a robust model of governance in Auckland that it hoped would ensure that the city and region of Auckland remained internationally competitive (a goal earlier identified by the Clark government in 2007). The Global Financial Crisis served to fuel this hope since the view was held that the Auckland economy is critical to the performance of the nation's economy. Reform ensued and on November 1 2010 a new Auckland Council was created but

the final outcome differed significantly from what had been recommended by the Commission (Royal Commission of Inquiry into Auckland Governance 2009). The Royal Commission favored the establishment of one Auckland Council for the whole region but more opportunities for parochialism were allowed to creep into the enabling legislation. The Commission advocated for six local boards, but the minister handling the legislation established 21 of them. Nevertheless, the council's regional focus would hopefully be ensured by the establishment of a powerful mayoral office, elected at large, with significant resources. The outcome was the creation of a region-wide unitary authority, the Auckland Council, coined by the media as Auckland's 'Super-City'. A raft of new regional and local plans with a greater expectation of implementation were included in the Royal Commission's report and the restructuring that followed (Davey 2014).

Conclusion

The history of planning and governance in Auckland between 1840 and 2010 is distinguished by the slow development of a regional vision and poor plan implementation; opposing agendas due to ad hoc governance across the region; a lack of regional oversight in terms of growth, development, and investment; and a slowness of central government to respond. The forces of parochialism usually drowned moves towards a regional identity for Auckland. Much discussion could be generated locally, and a series of ad hoc authorities were established over the years to handle specific regional functions such as the provision of clean water, effective sewerage and better public transport – even if they had overlapping boundaries. But any fruitful changes to governance within the wider Auckland region required central governmental intervention. Planning legislation first occurred in 1926 but the requirement to develop plans by central government did not occur until the 1953 Act. The legislation was strengthened in 1977. However, planning was never able to keep apace of the rapidly increasing population pressures even following the formation of the Auckland Regional Authority in 1963 which again took place because of government legislation. The stipulation in the 1989 wholesale reforms conducted at the national level that territorial politicians could not contest elections at the regional level provided regionalism with a sharper focus. But it was central government in 1992 that then partly undid the regional thrust in Auckland when it stripped away most of the resources from the new Auckland Regional Council, allowing the territorial local authorities to circumvent regional agendas. This again

compromised the ability for a coordinated and integrated approach to growth-related challenges. While a variety of regional plans developed, and agencies were established to coordinate public transport as well as several lesser functions, the ARC languished until central government, itself under pressure for greater enabling subsidies, restored the ARC's former resources. Even then there was a financial shortfall that a big spending central government was unable fully to make up.

A need for governance reforms across the Auckland region had never died away completely after 1989, and especially after 1992. Auckland City Council, the biggest of the seven territorial agencies within the region, frequently advocated further reform. So did the business sector that constantly bemoaned the discordant opinions on regional issues that emanated from the territorials. The Mayoral Forum enabled some fruitful discussions to take place between local leaders and central government, but progress was glacial. In the end it took an act of what was seen by ministers as lese majesty over the waterfront stadium before central government took steps to bring about a final solution to a century and a half of local government disharmony in Auckland. The method chosen by the government was to establish a Royal Commission to examine how best to restructure governance in the region so as to facilitate the implementation of Auckland's One Plan.

It took 160 years to get a governance model with sufficient strength and a capacity for decisiveness that might enable a better response to Auckland's issues. It is too early to say whether the governance changes on November 1, 2010 have succeeded in making the new council's outlook more regional. But the opportunities afforded by competing fiefdoms to thwart regional initiatives have certainly been substantially reduced. New Zealand's largest city at last has a chance to plan regionally, to look outwards, and to compete with other Pacific Rim cities. (1)

CHAPTER FIVE

MUNICIPALITIES' PARTICIPATION FUND, INEQUALITY AND GROWTH IN THE STATE OF MATO GROSSO, BRAZIL 2001–2010

WILLIAM RICARDO MARQUEZIN AND ADRIANO MARCOS RODRIGUES FIGUEIREDO

The Brazilian State of Mato Grosso (MT) presents an impressive per capita income inequality. According to calculus from the official statistics provided by the IBGE (Instituto Brasileiro de Geografia e Estatística) database, among Mato Grosso's 139 municipalities, as of 2001, the richest 15 contributed with 62% of the State's GDP; the poorest 15 only 0.57%. By 2010, among its 141 municipalities (two more than 2001), this proportion had no significant change, say, 61% and 0.73% respectively the richest and the poorest 15. Almost 70% of those 141 municipalities, as of 2010, have a GDP per capita smaller than the national average (Brazil IBGE 2010). At the same time, municipalities like Sorriso, Lucas do Rio Verde, Sapezal and others are among the highest GDP per capita in the country. With 5,565 municipalities in Brazil, Mato Grosso has 7 in the top 10% according to the municipal Human Development Index (HDI) of 2010, calculated by the United Nations Development Programme (UNDP) at its Brazilian office. One other municipality is above the national HDI average, and those remaining are below the mean of the national HDI.

The Brazilian Federal Constitution of 1988 established some governmental transfers to States and Municipalities so that a quota share of the Goods and Services Tax (GST) of each city and a Participation Fund would act as a policy to reduce inequalities and eradicate poverty. In fact, we argue: is this governmental transfer system, with emphasis on the Goods and Services Tax (GST) and on the Municipalities' Participation Fund (MPF), helping to elicit economic growth and to reduce GDP per

capita inequalities among municipalities of Mato Grosso, in the period 2001-2010?

The general objective is to investigate how the intergovernmental transfer policies, with emphasis in the Municipalities' Participation Fund (MPF) and the quota share of the Goods and Services Tax (GST) of each city, contributed to the growth of per capita GDP between the years 2001 and 2010.

Specifically, firstly we did an Exploratory Spatial Data Analysis (ESDA) of growth and GDP components; and secondly, an analysis of the effect of GST and MPF over GDP per capita growth. The Exploratory Spatial Data Analysis (ESDA) was used with annual data from 2001 to 2010 at municipal level.

Characteristics of Mato Grosso

Mato Grosso (Figure 5-1) is one of the largest Brazilian states, twice the size (903,357 km²) of the USA's state of California (423,970 km²) and is one of the most important agricultural areas in South America and in the World. In the 2013 agricultural year, Mato Grosso's production was 23.5 million tons of soybeans (25% of Brazil's production), with 7.0 million hectares planted (Brasil IBGE 2013). Its production ranks the state as first in soybean, maize and cotton production and second in beef cattle, among Brazilian states. It has an emerging industry mainly in agribusiness.

Mato Grosso has a huge economic concentration: the upper five municipalities in Gross Domestic Product (GDP), in 2001, were the capital Cuiabá (22.4%), Rondonópolis (6.7%), Várzea Grande (6.5%), Sorriso (3.5%) and Sinop (3.4%), together with 42.6% of MT's GDP and 38.5% of the population. The capital alone had a GDP equivalent to the lowest 106 municipalities. By 2010, this scenario had not changed much, respectively: Cuiabá (18.5%), Rondonópolis (8.5%), Várzea Grande (5.8%), Primavera do Leste (3.5%) and Sorriso (3.5%), were equivalent to 39.8% of total MT's GDP (Brasil IBGE 2013).

Comparing the annual GDP per capita (GDPpc), among Brazilian municipalities, the country's average GDPpc was R$ 19.016,00 in 2010, and MT's average GDPpc was R$ 19.331,00. In the 141 total municipalities of MT, 43 had GDPpc above the national average. The lowest values were for Alto Paraguai (R$ 6.607,86), São Pedro da Cipa (R$ 6.970,00) and Santo Antônio do Leste (R$ 7.872,00) (Brasil IBGE 2013).

Figure 5-1. State of Mato Grosso (MT), Brazil, South America

According to the official Financial System in Brazil – FINBRA (1) (BRAZIL MF 2013), the quota share of the Goods and Services Tax (GST) transferred to MT's municipalities represented in average 23.5% of total budgetary income. The Municipalities' Participation Fund (MPF), another important source of municipal income, had an average of 19.5%. That's why we present a detail for these intergovernmental transfers.

The goods and services tax in Mato Grosso

The 'Imposto sobre operações relativas à Circulação de Mercadorias e sobre prestações de Serviços de transporte interestadual, intermunicipal e de comunicação' (ICMS), say the 'Goods and Services Tax' (GST), has an important role in the economic structure of Brazilian Municipalities and States.

In 2009, the GST was 87.87% of all MT's tax income, and 48.55% of overall income (Mato Grosso SEFAZ 2013). According to the Federal Constitution of 1988, 25% of total revenue of GST must be transferred to the municipalities. From this transfer, 3/4 is distributed according to the fiscal value added and 1/4 according to the state's law. The distribution

rule changed from 2000 to 2010, and as of 2013, it followed the rule for determining the quota:

- Fiscal Value Added (75%): value of outgoing of goods, net of the value of incoming goods, for each year, adding up the value of exemptions.
- Own fiscal incomes (4%): relative share of municipal own tax income and the state own tax income.
- Population (4%): percentage of municipal population in the state.
- Area (1%): percentage of municipal area in the state.
- Conservation Unit/indigenous territory (5%): percentage of indigenous land in the municipality and the sum of all percentages for those municipalities which have indigenous land.
- Social coefficient (11%): municipal percentage in the sum of the inverse of the municipal human development index (MHDI) in the state.

According to this, in 2010, the MT's municipalities in the top 10% of GST revenues had an average of R$921,95 (2). At the same time, those less privileged by the tax revenues received transfers of R$173,24 per habitant (Mato Grosso SEFAZ 2013). The overall average was R$387,23 per habitant and 64% of the state population were below this average.

The Municipalities' Participation Fund in Mato Grosso

The Municipalities' Participation Fund (MPF), similarly to the GST, is an important source of revenues for the municipal government. According to the official Financial System in Brazil – FINBRA (Brasil MF 2013), in 2010, an average R$321,74 per habitant was transferred to municipalities, and 61.6% of the MT's population were in municipalities which received less than this average.

The Federal Constitution of 1988 established that 22.5% of all revenues of income tax and taxes over industrialized products should be transferred to the municipalities as of the MPF. The present legislation sets that the states' capitals get 10% of total MPF, the other municipalities get 86.4% and 3.6% is kept as a reserve. In general, the calculation has two factors: population and per capita income (Brasil MF 2013). For municipalities in the interior, the coefficients are obtained from the percentage share of the State over the MPF, and the coefficients of the number of municipal inhabitants. For the reserve coefficients, the distribution contemplates those municipalities with more than 142.633

habitants, obtaining the fraction figure for each municipality in the sum of all the populations of those municipalities of the reserve as a populational rule. The IBGE annually publishes this population statistic.

According to the National Treasury Secretariat, (Brasil MF 2013), in 2010, the upper 10% of the MT's population received per capita transfers of R$833,68 in average, in 64 municipalities with less than 12 thousand habitants. The lowest 10% received an average of R$148,07, in Cuiabá and Várzea Grande, the two biggest populations in the State. The three biggest per capita transfers were Araguainha (R$ 3.509,25), Serra Nova Dourada (R$ 2.815,11) and Ponte Branca (R$ 2.155,15). The five lowest were Várzea Grande (R$ 145,89), Cuiabá (R$ 158,93), Sinop (R$ 181,23), Rondonópolis (R$ 188,25) and Cáceres (R$ 203,98).

Method and data

The study included 139 municipalities as of 2001 – in that year the municipalities of Ipiranga do Norte and Itanhangá had not been created. All monetary values were at December 2010 prices, deflated using the general price index (IGP-DI) available at the IPEADATA (Brazil IPEA 2013) and described at Table 5-1.

The municipal per capita income growth rate ($Y_{i,t}$) between 2001 and 2010 followed Barro and Sala-i-Martin (1992, 230), calculated as an expression (1)

$$Y_{i,t} = \frac{1}{T} ln\left(\frac{Y_{0+T}}{Y_0}\right), (1)$$

where Y_0 is the municipal GDP per capita(GDPpc) in year 2001; Y_{0+T} is the GDPpc in year 2010; T is the year.

The income per capita at the initial year 2001 ($Y_{i,t-1}$) is the logarithm of the municipal GDPpc of 2001. The sectorial composition (share) in the economy followed Barro and Sala-i-Martin (1992, 234), adapted by Dassow (2010, 48):

$$S_i = \left(\frac{VA_{i,0}}{VA_{total,0}}\right)x \ ln\left(\frac{VA_{i,0+T}}{VA_{i,0}}\right), (2)$$

where S_i is the composition of the value added of sector i in the total added in the economy; $\left(\frac{VA_{i,0}}{VA_{total,0}}\right)$ is the sectorial representation in the municipality's total added by 2001. The $\left(\frac{VA_{i,0+T}}{VA_{i,0}}\right)$ represents the growth rate of the sector i (i relates to industry, agriculture, services, and public administration sectors).

The GST Transfers (*ticms*) are the total of the GST transferred from the state government to the municipalities divided by its population, by each municipality, calculating the per capita value.

Table 5-1. Variables description.

Description	Theoretical Background	Empirical Background	Source
$Y_{i,t}$ - Municipal per capita income growth rate	Oliveira and Monastério (2011)	Dassow (2010:46)	IBGE
$Y_{i,t-1}$ - Per capita income at the initial year	Solow (1956)	Maranduba Júnior (2007); Ribeiro (2010); Oliveira and Monastério(2011)	IBGE
Sind - Industrial composition	Myrdal (1965)	Barro and Sala-i-Martin (1992:234); Maranduba Júnior and Almeida (2008); Dassow (2010:48)	IBGE
Sagro - Agricultural composition			IBGE
Sserv - Services composition			IBGE
Spub – Public administration composition			IBGE
ticms - GST Transfers	Myrdal (1965); Fujita et all (2002)	Maranduba Júnior and Almeida (2008)	MF-STN
tfpm - MPF Transfers	Myrdal (1965); Fujita et all (2002)	Maranduba Júnior and Almeida (2008)	MF-STN
gini - GINI index	Kuznets (1955); Barro and Sala-i-Martin (1992:234),	Souza (2003) and Dassow (2010:48)	UNDP

Source: Author's elaboration.

The MPF transfers (*tfpm*) are the total of MPF transferred from the state government to the municipalities divided by its population, by each municipality, calculating the per capita value.

The Gini index (*gini*) is the income concentration degree by municipality.

Spatial data analysis

According to Anselin (1988, 7), the spatial data analysis is used to describe the spatial distribution of variables, to trace spatial correlations patterns, to point out the existence of clusters or even outliers. The spatial dependence may be treated using Moran's I method in global terms or even by using the LISA (Local Indicator of Spatial Association) method.

To address the spatial weight, we used the queen rule, where the municipalities which face common borders have the weight 1 while non-neighbors have weight 0. With this contiguity matrix, the LISA (I_i) are calculated by (3):

$$I_i = \frac{(y_i - \bar{y}) \sum_j w_{ij}(y_i - \bar{y})}{\sum_i (y_i - \bar{y})^2 / n} , (3)$$

where n is the number of municipalities; w_{ij} is an element of the contiguity matrix (1 for neighbors i and j, and zero for non-neighbors; and y_i is the natural logarithm of the GDPpc of municipality i.

The LISA measure is useful for the analysis of local spatial processes. In this sense, the local indicators are associated in four groups: High-high – municipalities i and j with high GDPpc values; Low-low - municipalities i and j with low GDPpc values; High-low and Low-high for those municipalities in these respective groups. These high and low values are defined according to the average, if I_i is above or below the average value.

The Gini coefficient is the traditional income concentration index relating the inequality among values of a frequency distribution. A Gini equal to zero means perfect distribution, equality, and all values are the same among municipalities. The opposite would be a Gini of one, meaning perfect inequality and one municipality has all the income.

Growth and inequality in Mato Grosso

Between 2001 and 2010, the State of Mato Grosso exhibited a real GDP per capita growth of 4.55% annually. The average income per capita was of R$ 13.191,64 in 2001, and grew to an average of R$ 19.691,05 in 2010.

There is a strong income inequality in the state, and in 2001 the richest municipality had income 29 times higher than the poorest. In 2010, this difference was about 12 times. Figure 5-2 and 5-3 have the real GDPpc growth rates for 2001–2010, for Mato Grosso's municipalities, according to the IBGE official data. Most municipalities were with low real GDPpc growth rates (dark colors represent higher growth rates).
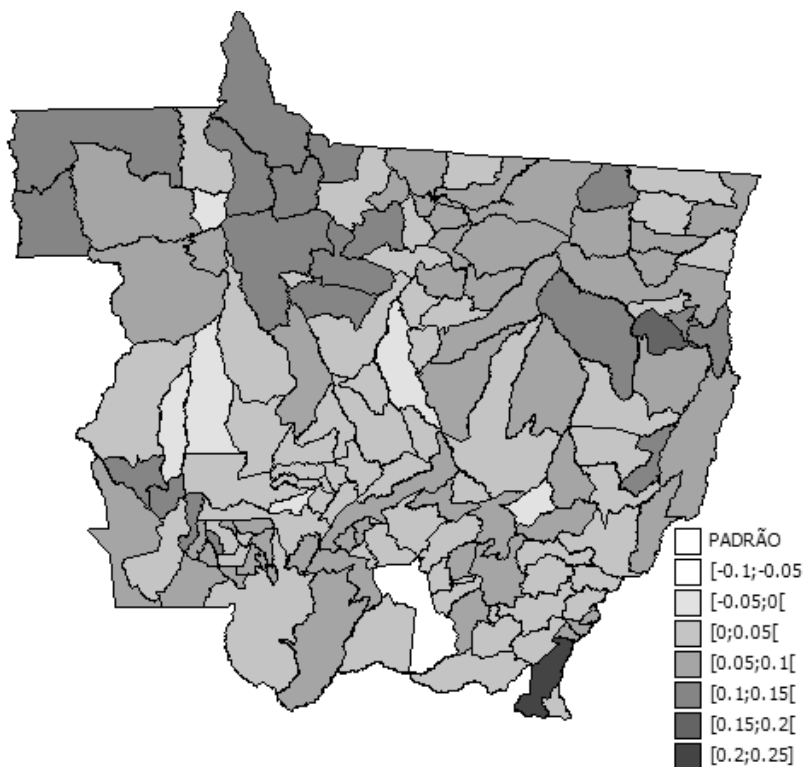
Figure 5-2. GDP per capita growth rates, Mato Grosso, Brazil, period 2001–2010. Source: IBGE official data, research data.

Among the 139 municipalities, two presented an average real growth above 15% annually: Bom Jesus do Araguaia (14.9%) and Alto Araguaia (20.4%). The negative highlights were seven municipalities: Sorriso (-0.1%); Sapezal (-0.3%); Juruena (-0.6%); Campos de Júlio (-1.4%); Nova Olímpia (-2.1%); Santo Antônio do Leste (-4.2%); and Santo Antônio do Leverger (-8.0%). It can be seen that 59 of 139 municipalities were in the

central group (5%). The map exhibits a pattern of higher rates in the northern part of the state, and an outlier in the extreme south. This outlier is specifically related to the railroad Ferronorte, connecting the state with a port on the coast of Atlantic Ocean. The northern part exhibited high growth mainly as agricultural frontiers were opened into the Amazon forest. The negative growth municipalities were mainly due to expressive increase in population, reducing the GDP in per capita terms.
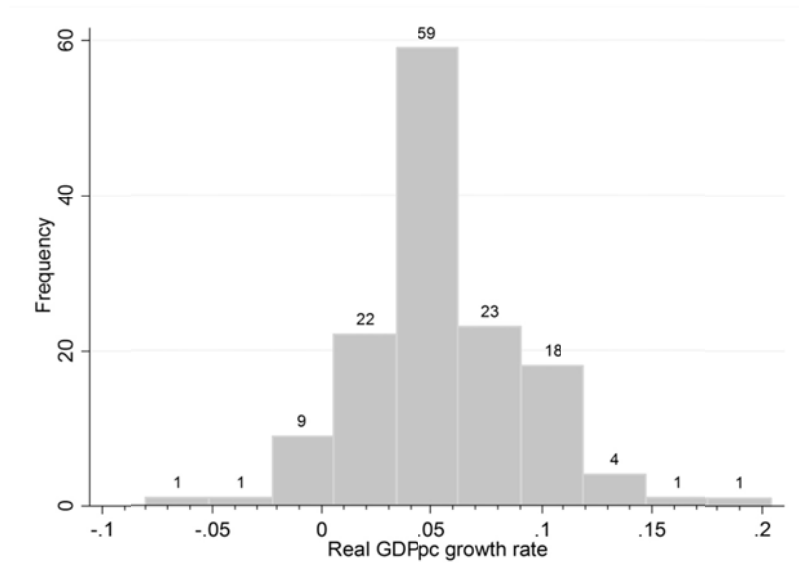
Figure 5-3. Histogram: GDP per capita growth rates, Mato Grosso, Brazil, period 2001–2010. Source: IBGE official data, research data.

In Table 5-2, there are descriptive statistics of the variables in the dataset. The real GDP per capita in 2001 showed a mean of R$ 13.217,00. The maximum was for Santo Antônio do Leverger, with a real GDP per capita of R$ 108.361,00. This municipality is the 33rd highest real GDP but with only 1,930 habitants, showing up a high GDP per capita. The minimum was for Vale de São Domingos, with a real GDP per capita of R$ 3.712,00.

The mean of the industry sector composition in the period was 0.0674, with a maximum in Rondonópolis with 0.3593 and a minimum in Nova Olímpia with -0,1469. The agricultural composition had a mean of 0.2218, a maximum at Nova Bandeirantes (0.6950) and a minimum of Santo

Antônio do Leste (-0,3739). The services composition had a mean of
0.1155, the top in Alto Araguaia (0.7127) and the bottom in Santo Antônio
do Leverger (-0,5629). The public administration composition had a mean
of 0.1271, a high in Novo Santo Antônio (0,6550) and a low in Novo São
Joaquim (0,0060).

Table 5-2. Descriptive statistics, Mato Grosso, 139 municipalities.

Variables	Mean	Median	Std. Dev.	Min	Max
GDPpc growth	0.0541	0.0497	0.0371	-0.0799	0.2041
GDPpc 2001 (R$ pc)	13,217	8,751	14,834	3,712	108,361
Industry composition	0.0674	0.0544	0.0769	- 0.1469	0.3593
Agriculture composition	0.2218	0.2218	0.1859	- 0.3739	0.6950
Services composition	0.1441	0.1282	0.1227	- 0.5629	0.7127
Public admin composition	0.1271	0.1082	0.0887	0.0060	0.6550
GST transfers (R$ pc)	445.03	382.59	305.04	87.68	1,883.49
MPF transfers (R$ pc)	973.11	535.94	1,721.46	60.68	13,408.23
Gini Index	0.5755	0.5800	0.0771	0.36	0.87

Source: Research data. Note: monetary values in real 2010 prices, in R$ per capita.

Comparing the sectorial composition variables, we observe that the
agricultural sector had a higher standard deviation (0.1859), given a bigger
representativeness of this sector in some sub-regions of the state. The
services sector also presents an expressive standard deviation (0.1227) but
this sectorial importance was not for the majority of the municipalities.
The smaller standard deviation was for industry (0.0769), essentially
because almost all municipalities had a small participation of the industry
(106 of 139 had less than 0.1).

The per capita transfers had high amplitude: the GST ranged from
87.68 to 1,883.49; the MPF from 60.68 to 13,408.23. Respectively, the
means were 445.03 for GST and 973.11 for MPF. Comparing to the
budgetary expenditures, the municipalities had a per capita mean of R$

1.800,44, with a high of R$ 4.506,85 in Santo Antônio do Leverger and a low of R$ 532,43 in Santo Antônio do Leste.

Growth and tax transfers spatial analysis

In this section we analyze the spatial autocorrelation among municipalities' growth rate of their GDP per capita and GST and MPF intergovernmental transfers. The calculation of the LISA (Local Indicator of Spatial Association) was associated to a statistical significance level of 5%. Say, values in blue/red are statistically significant and different from zero, meaning that they can be included in a group (we have four groups: High-High, Low-Low, High-Low and Low-High values of the LISA). In the regional science literature it is usual to call them spatial clusters.

In Figure 5-4, the LISA map for the municipal real GDP per capita growth rate between 2001-2010 exhibits more clusters Low-Low type (in dark blue) rather than others. Mainly, we can say these Low-Low clusters are in agricultural areas.
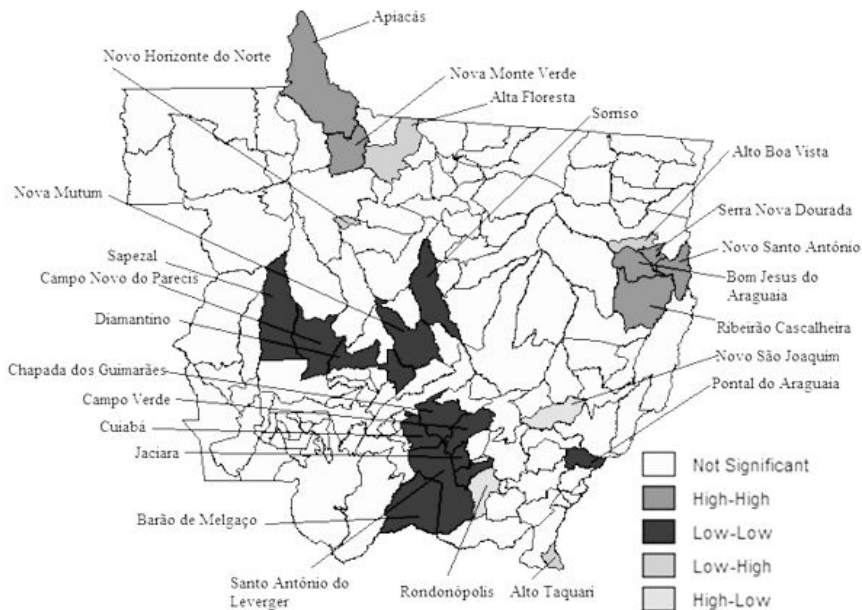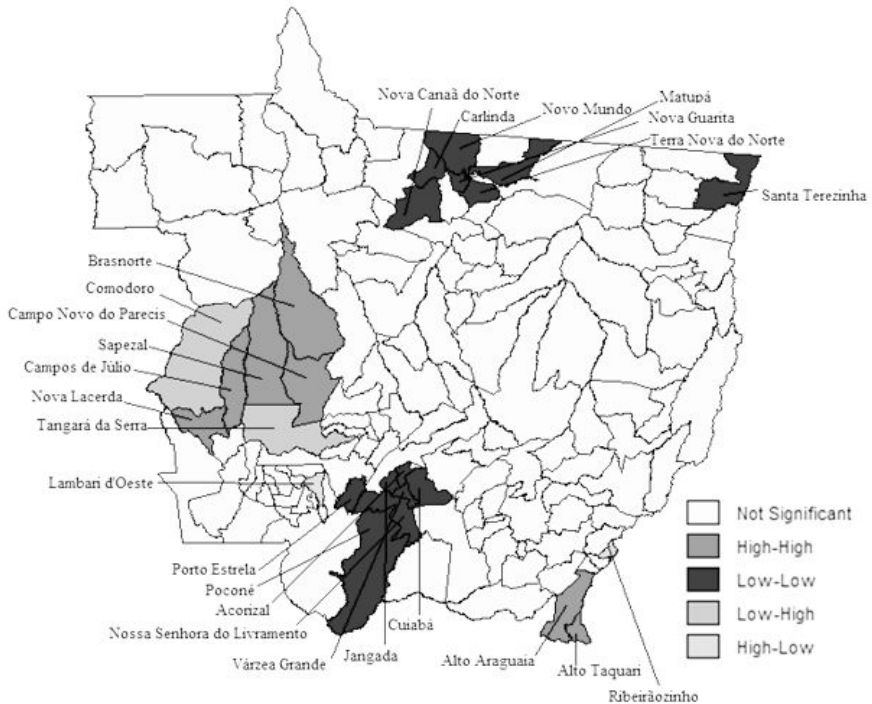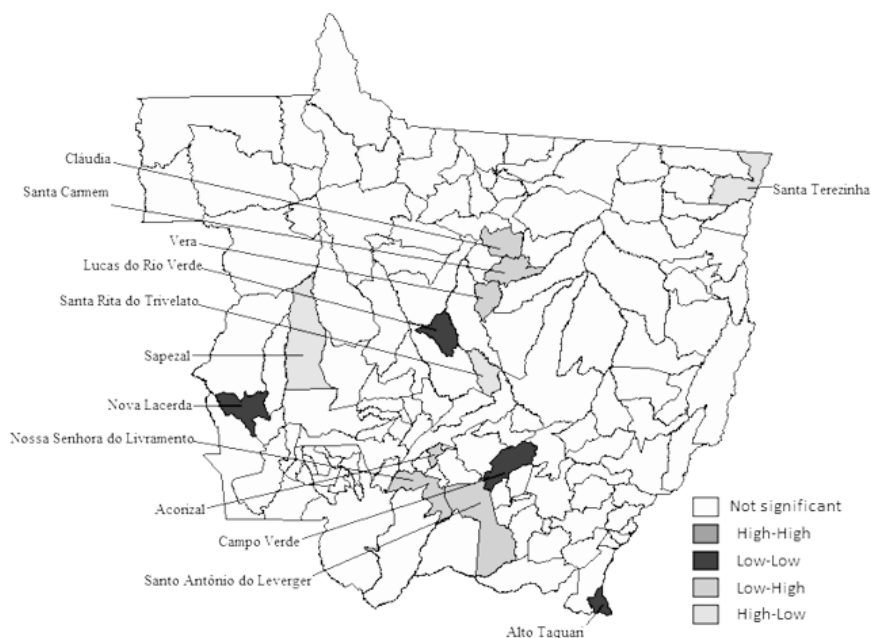

Figure 5-4. LISA clusters of municipal real GDP per capita growth for the period 2001–2010, Mato Grosso, Brazil. Source: IBGE official data, research data. Obs.: Values statistically significant at 5%.

These are municipalities with low LISA values whose neighbors also have low LISA values for the growth in GDP per capita. Twelve municipalities show this situation: Barão de Melgaço with an annual growth rate of 4.94%; Campo Novo do Parecis (0.19%); Campo Verde (0.5%); Chapada dos Guimarães (1.63%); the States' capital Cuiabá (3.02%); Diamantino(3.68%); Jaciara (3.14%); Nova Mutum(3.81%); Pontal do Araguaia(4.18%); Santo Antônio do Leverger (-7.67%); Sapezal(-0.27%) and Sorriso (-0.10%).

   Only six municipalities showed up high values surrounded by neighbors with high values: Apiacás (12.16%); Bom Jesus do Araguaia (16.02%); Nova Monte Verde (11.68%); Novo Santo Antônio (10.96%); Ribeirão Cascalheira (5.78%) and Serra Nova Dourada (10.80%).

   Municipalities with high growth values with neighbors with low growth are Novo São Joaquim and Rondonópolis, respectively, with 5.65% and 6.47% annually. In contrast, those with low values surrounded by high values are Alta Floresta (4.57%), Alto Boa Vista (4.66%), Alto Taquari (4.32%)and Novo Horizonte do Norte (3.44%).

   Analyzing Figure 5-5, with the average GST transfer per capita by municipality, between 2001 and 2010 with a mean of R$ 445,03, there were 14 municipalities in low-low clusters; 7 in high-high; 2 in high-low and another 2 in low-high, at the 5% significance level. The low-low clusters included: Acorizal (R$ 174,06 per habitant yearly); Carlinda (R$ 163,45) the State's capital Cuiabá (R$ 292,37); Jangada (R$ 197,51); Matupá (R$ 308,47); Nossa Senhora do Livramento (R$ 129,41); Nova Canaã do Norte (R$ 253,40); Nova Guarita (R$ 242,82); Novo Mundo (R$ 421,76); Poconé (R$ 123,38); Porto Estrela (R$ 389,16); Santa Terezinha (R$ 261,66); Terra Nova do Norte (R$ 355,30) and Várzea Grande (R$ 185,26). The two high-low clusters are Lambari D'Oeste and Ribeirãozinho, respectively with   R$ 577,33 and R$ 572,95. The seven high-high municipalities exhibit two clusters: one including Alto Araguaia (R$ 1.042,80) and Alto Taquari (R$ 1.675,49); and another with Brasnorte (R$ 639,77), Campo Novo dos Parecis (R$ 1.085,08), Campos de Júlio (R$ 1.883,49), Nova Lacerda (R$ 476,29) and Sapezal (R$ 1.566,99). Two municipalities in the low-high values form a cluster: Comodoro and Tangará da Serra, respectively with R$ 321,41 and R$ 305,91.

Figure 5-5. LISA clusters of average municipal real GST per capita for the period 2001–2010, Mato Grosso, Brazil. Source: Mato Grosso SEFAZ official data, research data. Obs.: Values statistically significant at 5%.

In Figure 5-6, the MPF transfer per capita in real values had its LISA values mapped. The mean of the distribution was R$973,11, and there was no high-high cluster statistically significant at 5%. In the high-low group there were three isolated municipalities: Santa Rita do Trivelato (R$ 1.022,79), Santa Terezinha (R$ 1.823,50) and Sapezal (R$ 1.198,61). In the low-high LISA classification, there were six municipalities in two clusters: a) Acorizal (R$ 583,27), Nossa Senhora do Livramento (R$ 666,57), and Santo Antônio do Leverger (R$ 728,59); and b) Cláudia (R$ 222,72), Santa Carmem (R$ 828,14), and Vera (R$ 370,68). The low-low pattern had four isolated municipalities: Alto Taquari (R$ 367,07), Campo Verde (R$ 280,68), Lucas do Rio Verde (R$ 231,15) and Nova Lacerda (R$ 687,45).

Figure 5-6. LISA clusters of average municipal real MPF per capita for the period 2001–2010, Mato Grosso, Brazil. Source: Brazil MF/STN official data, research data. Obs.: Values statistically significant at 5%.

The information in Figure 5-7 evidenced a high-high cluster with Comodoro and Nova Lacerda, with 2000 Gini values of 0.64 and 0.60, respectively. We must remember that low Gini values are better results in inequality. Low-low values occurred for Barra do Bugres and Rio Branco, both with 0.55.The high-low values of Gini were for two clusters high-low values of Gini in Araputanga (0.59) and Arenápolis (0.59). A third cluster high-low was for Alto Garças (0.70), Guiratinga (0.61) and Ribeirãozinho (0.60). Low-High results were found in three isolated municipalities: Conquista D'Oeste, Nova Canaã do Norte and Sapezal, respectively with 0.57, 0.56 and 0.47.

The need for tax revision

The Brazilian state of Mato Grosso presents an important economic inequality among its municipalities. This seems to be persistent over the years and the political actions by tax transfers are not showing satisfactory results in terms of inequality reduction.
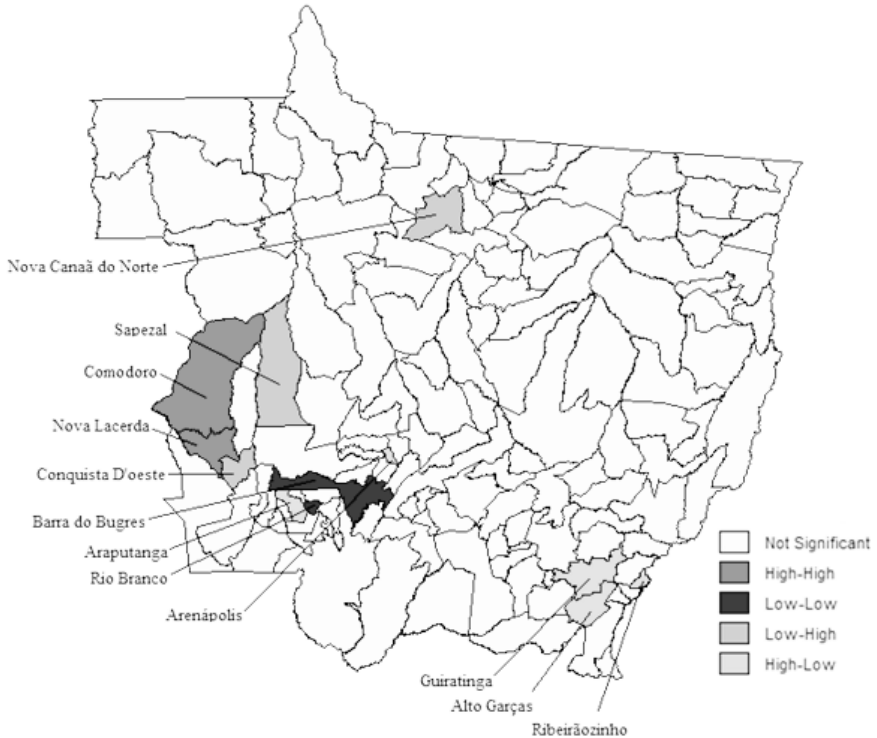
Figure 5-7. LISA clusters of the GINI Index of 2000, Mato Grosso, Brazil.
Source: UNDP Brazil official data, research data. Obs.: Values statistically significant at 5%.

In this sense, by using the LISA statistic for spatial dependence, we infer that municipal growth is not uniform across the state of Mato Grosso, presenting more clusters of the low-low type than the high-high type. Below the average there are more clusters of the low-low type in terms of GST per capita transfers. Looking at the MPF transfers, we also conclude that there is no high-high cluster of MPF per capita.

The tax transfers should be an active way of reducing inequality, but we found a bigger concentration in the GST per capita and MPF per capita than in the GDP per capita in 2010. There is a need to revise the methodology of the calculation of intergovernmental transfers, as we notice that the tax transfers have, among others, a function of economic inequality reduction.

CHAPTER SIX

REGIONAL IDENTITY CONFLICTS IN ROMANTIC OPERAS IN THE FIRST HALF OF THE 19TH CENTURY

PRZEMYSŁAW KRZYWOSZYŃSKI

Exotic civilizations fascinated composers of staged works, especially in the 18th-century French court; the most characteristic work concerning "other" civilizations was the opéra-ballet *Les Indes galantes*. In the post-Napoleonic Romantic period, a time of colonial conquests and independence movements, the conflict of civilizations and the image of confrontations between them became a very important theme in librettos and in musical forms of the time. The characters and local communities in these works were described by means of interesting musical techniques and fine artistic effects. The composers created dramas in which conflicts between communities were, on one hand, a good background for the dramatic plot; on the other hand, the artists could express their personal political support for independent movements and use such a work as an analogy for contemporary events.

During the first half of the 19th century, the most important operas from within this trend were *Le Siège de Corinthe*, *Moïse et Pharaon*, and *Guillaume Tell* by Rossini; *Il Pirata* and *I Puritani* by Bellini; and Donizetti's *Les Martyres* and *Dom Sébastien roi de Portugal*. Community and dialogue, and confrontations with "others" were also present in various other contexts, such as the political revolutions in *La Muette de Portici* by Auber, and the political plots in Verdi's "Risorgimento" opera or his *I Vespri Siciliani*. At the same time, religious persecutions were portrayed in the French *grand opéra* like Meyerbeer's *Les Huguenots* or *La Juive* by Halévy.

I will analyze the direct and indirect influence of selected French, Italian and German operas from the first half of the 19th century on regional conflicts and local patriotic attitudes. By direct influence I mean

the reception of the original stage pieces, whereas indirect influence is used in relation to the impact of variations based on original fragments from romantic operas.

Opera and Politics on the National Level

Two great anniversaries in the operatic world are being celebrated this year: the *bicentennial* of the births of Verdi and Wagner (in 2013). Their artistic creations influenced the unification of two nations and led to the rise of two important nation states – Germany and Italy. Both the Italian and German composers became symbols of political unification, and helped shape the idea of nationalism and national identity (Cohen 2013, 4). However, the idea of unification of regions and nations was born earlier and is connected with early operas by Verdi and his predecessors, as well as with some French operas.

Relations between socio-political life in the first half of the 19th century and operas from that time are particularly interesting for three main reasons: Firstly, in the period between 1815 and 1848, there were many serious conflicts between authoritarian legitimacy and national (revolutionary) movements, some of which were only local movements, for example, in the area of today's Italy, Netherlands, Germany, Hungary and Poland. Secondly, Romanticism valued individualism and idealism, and the importance and influence of individuals increased in public opinion. This idea was manifested in the art and activity of virtuosos like Liszt, Paganini, and Chopin, as well as by many opera singers. Moreover, according to philosophers (the German Romantics or Giuseppe Mazzini), the nation was understood as a human being that possessed his own characteristic, unique spirit (Sabine 1968, 397 and ff.). Soon after the Napoleonic wars, the legend of the Emperor as a hero who changed the history of the whole of whole Europe became an inspiration not only for artists, but for almost all independent movements. Thirdly, many independent movements, even local ones, were fascinated by colonial conquest, which had an important and visible influence on political and artistic life in 19th-century Europe.

Rescue Opera and *Grand Opéra*:
Their Role in the Constitution of Regional Identity

We must remember that opera from the time of the French Revolution was the most popular medium at the beginning of the 19th century. Since the end of the 18th century, European audiences in theaters no longer

represented just the aristocracy and members of royal families. 19th-century audiences also consisted of lower social classes, including merchants, representatives of free professions, and students. As an example, we can use some descriptions from popular novels of the 19th century, like *The Red and the Black*, *The Count of Monte Cristo*, *Madame Bovary* or *Anna Karenina*, in which twists in the action often take place during performances in opera houses; also, the events in the plots of librettos sometimes constitute direct allusions to the intrigue of the novel. In almost every diary from that time, one can find detailed descriptions of operas. (Lacombe 1997, 239; Dumesnil 1963, 405–406; Weinstock 1963, 252; Barbier 1987; Krzywoszyński 2012, 49–65). What is surprising about these descriptions is that the opera house was considered a centre of social and political life, where people only rarely came just to listen to music.

During the times of the French Revolution, the opera was used as a propaganda vehicle for the idea of the unification and glorification of the nation, society and the heroic fight for revolutionary ideas (Bartlet 1992, 107–156). The first the rescue opera (revolutionary opera) *Les rigueurs du cloître* (1790) by Henri-Montan Berton was used by revolutionary authorities as well as by the French army. Very popular at that time was another rescue opera– *Lodoïska* (1791) by Luigi Cherubini, which emphasized the importance of cultural and political community (Starobinski 1973, 190; Gmys 2003, 192–193; Smith 1970, 182; Role 2000, 166; Krzywoszyński 2013b, 573–579; Charlton 1992, 169–190). During the Napoleonic époque, a new genre of opera became very popular, which later became the *grand opéra* and popularized the universal idea of conquest – as in *Fernand Cortez ou La conquête du Mexique* by Gasparo Spontini. By musical and theatric means, the composer presented the conflict of civilizations, and in the year 1809, the work was used as a metaphor for the wars against the Austrian Empire. In an allusion to Napoleon I, Cortes brings enlightenment and civilization to barbarians and represents reason and law as opposed to irrationality and injustice. What is particularly interesting in *Fernand Cortez* was that not an individual, but the community was the main hero (Bartlet 2002, 289). According to Streatfield, everything about the work – the music, set scene and dramatic effects – were innovative and had monumental style:

> Spontini's training was Neapolitan, but his first visit to Paris showed him that there was no place upon the French stage for the trivialities which still delighted Italian audiences. [...] He is the last of what may be called the classical school of operatic composers, and he shows little trace of the romanticism which was beginning to lay its hand upon music. He was accused during his lifetime of overloading his operas with orchestration,

and of writing music which it was impossible to sing – accusations which sound strangely familiar to those who are old enough to remember the reception of Wagner in the seventies and eighties. His scores would not sound very elaborate nowadays, nor do his melodies appear unusually tortuous or exacting, but he insisted upon violent contrasts from his singers as well as from his orchestra [...] (Streatfield 1907, 34–35; see also Chaillou 2004, 19 and ff.)

It is interesting to note that in Napoleon's Empire applauding was forbidden during performances, and audiences could clap only at the end of an opera (Starobinski, 2011, 154).

The division of Europe created by the final agreement reached at the Congress of Vienna in 1815 was artificial; many nations were separated (Italy, Germany), while others found themselves under foreign rule, in many cases under that of an enemy power (Poles, Belgians, Greeks). The idea behind the settlement was to restore legitimate (i.e. hereditary) monarchs to the thrones of Europe's kingdoms. As a consequence, it provoked the rise of many liberal and radical movements and ideas.

Restoration was visible in cultural and artistic life. At that time, there were many opera houses like in Italy (La Scala in Milan, La Fenice in Venice, San Carlo in Naples, Teatro Argentina in Rome, Teatro Comunale in Bologna, Teatro Regio in Turin, Teatro Riccardi in Bergamo), as well as in Germany, that were dependent on official rulers and local courts (Hardin 1999, 18–23). In spite of this, many political and economic rapports, and contacts and exchange between regions were animated through artistic activity, including operatic performances (Alessandro 2012, 132–170) Many composers and works promoted collaboration between regions in order to achieve national reunification, especially in Italy, and in some cases in the territory of former Poland, where operas sparked of political changes, both on the national and regional levels.

In the first half of the 19th century, two main genres of opera were the most popular: the first was the French *grand opéra* (based on earlier forms, the *tragédie lyrique* and revolutionary operas) with its large and complex collective scenes i.e. tableaux; the second was the Italian serious opera – *tragedia lirica* (former Neapolitan *opera seria*), which transformed old musical and dramatic schemes and forms, introducing collective scenes, and developing instrumental and choral means (Einstein 1959, 147; Charlton 2003, 5–6, 10–14; Lacombe 2003, 21–42; Williams 2003, 67–68; Kimbell 1991, p. 391 and ff, 430 and ff.).

During a fifteen-year period (1815–1830), opera became (sometimes accidentally) both the symbol for and the embers of revolution. The best example is *La Muette de Portici*, composed by Daniel François Esprit

Auber. The plot is based on two episodes from Neapolitan 17th-century history: the eruption of the volcano Mount Vesuvius in 1631 and the revolt of the Neapolitan people against the Spanish authorities in 1648. Eugène Scribe and Casimir Delavigne prepared an impressive libretto, with many theatrical effects as well as choral and ballet collective scenes – tableaux. Auber composed music in a heroic style typical for this time. After some problems with censorship, *La Muette de Portici* was performed in Paris in 1828 and 1829; the reception was quite surprising. The successor to the Neapolitan throne, having had a premonition of revolutionary tension after a performance in May 1829 said: "Nous dansons sur un volcan." ("We are dancing on the volcano"). In August 1830, the opera was staged in Brussels. During a second performance, people from the audience started a revolt, rapidly taking control of the city; this finally led to Belgium becoming independent from the Netherlands (Bardos and Fulcher 1988)

According to the general opinion, the plot of the opera was very dramatic, but its revolutionary effect was also due to the exalted and heroic music, especially the overture. Moreover, the duet from the second act, *Amour sacré la Patrie…*, and the choir of revolutionaries became important symbols of revolt (Hibberd 2003, 150) Interestingly, the main characters of the opera are revolutionaries who die and whose revolution fails. The main hero, Masaniello (tenor), is poisoned and his mute sister Fenela (a pantomimic role, symbolizing the suffering of the nation, a victim of the vice-king of Naples) kills herself (by jumping into the volcano). For the first time in history, a revolution on stage became a reality. The Belgians patriots interrupted performance during the second act, when the revolt starts in the opera. In *La Muette de Portici*, the local community is against a central, absolute power. By coincidence, the music and, above all, the plot inspired a new revolution and acquired a new interpretation. This opera became a symbol for other romantic revolts. In Poland, Auber's opera was performed for first time in 1831, during the November Insurrection, and the reception was similar to that in Belgium. Therefore, the conservative authorities of the insurrection decided to withdraw *La Muette de Portici* from the repertoire (Fulcher 1987, 11 and ff.)

In this case, an opera without any intention by the composer became a symbol of revolt, revolutionary movements, and finally independence. In operas from the first half of the 19th century, the use of dances, melodies, instrumentations to identify the social, religious and national traits of two conflicted groups was very popular (Hibberd 2003, 164–165) This was particularly characteristic in the *grand opéra*, which was very popular

during Romanticism and became a genre internationally acclaimed and followed by French, Italian and German composers.

The *grand opéra* synthesized many artistic forms: musical (both vocal and instrumental), ballet and theatrical. That all had a great influence on fashion, with the clothes of the elites of Paris were often having been inspired by operatic scenography (Moindrot, 1998, 63). The libretto was usually based on different historical conflicts, including religious, as in Meyerbeer's *Les Huguenots* or Donizetti's *Les Martyres*, religio-cultural, as in *La Juive* by Halévy, or national conflicts, as in *Guillaume Tell* by Rossini (Bartlet 2003, 273–278; Coudroy 1985, 13 and ff.; Pendle 1979; R. A. Straetfield 1907, 45–46; Sandalewski 1980).

Italian Kingdoms and Duchies after *Opera Seria*

The second genre of opera adopted by revolutionary and independent movements was the Italian works written by Vincenzo Bellini in the 1830s. After 1815, Italy was divided into many regions, which usually followed historical and traditional borders. Although Venice and Lombardy, for example, were under Austrian occupation, many local kingdoms with more historically legitimate rulers were against the unification of Italy.

The most important opera houses and theaters were situated in the regional capitals, including San Carlo in Naples, Argentina in Rome, La Scala in Milan, and La Fenice in Venice. Paradoxically, although these theaters supported the processes of decentralization and regionalization, they were also used to promote unifying tendencies.

The Risorgimento independence movement started after 1815 on the Apennine Peninsula and had three main phases. Despite a lack of consensus on the exact dates for the beginning and end of this period, many scholars agree that the process began in 1815 with the Congress of Vienna and the end of Napoleonic rule, and ended in 1871 when Rome became the capital of the Kingdom of Italy (Collier 2003, 2; Riall 1994, 1). The first was that of intellectual unification (1815–1847), during which many local movements were too weak to remove local absolute authorities and did not cooperate with one another. The second phase was the country's revolutionary unification (1848–1849). The first organized attempt at unification, led by politicians and legal authorities, was eventually pacified by France and Austria. The third and last phase, state unification (1851–1871), was initiated by the Kingdom of Sardinia. The King of Piedmont, with the help of secret diplomatic discussions with the French and later with the Germans, ultimately achieved state unification.

The third phase was possible only due to the army and state's control of the Kingdom of Sardinia. Even Garibaldi's movement – a spontaneous attack against the Kingdom of Naples (the Expedition of the Thousand) – had to recognize the suzerainty of King Victor Emmanuel II.

Bellini's Operas and Italian Unification

In all of these periods, opera played a very important role and often became a symbol of Italian unity and independence.

In the first phase, the ideological foundations were also linked to musical works. During this time in Italy, the most popular opera genre was influenced by the late Neapolitan *opera seria*, with an accent put on vocal virtuosity. Nevertheless, thank to composers like Niccolò Antonio Zingarelli (Bellini's teacher), Johann Simon Mayr (Donizetti's teacher) and Gioachino Rossini, the older forms of opera were developed and finally reached their apogee in *bel canto* – the vocal style that prevailed throughout Europe in the 19th century.

In the 1830s, two of Bellini's operas became a symbol of the Risorgimento movements: *Norma* (1831) and *I Puritani* (1834). Unlike Auber, Bellini, a composer of Sicilian origin and a pupil of Zingarelli, was conscious of the Italian political situation and censorship. During his short life (he died at 34), he composed ten original operas, and had a very individual style, with beautiful lyric melodies. For his two mature operas, the first staged in Milan and the second in Paris, he took inspiration from the French *grand opéra*, including its instrumentation, the importance of the choir as a collective character, and political conflicts as a main topic of the plot (in *Norma* between the Gaul community and the Roman occupiers; in *I Puritani* between royalists and parliamentarians). In *Norma*, all political allusions were focused on Oroveso (bass, the high priest of the druid). He plotted and ordered the revolt to wait; according to Batta, he is "[...] a precursor of the Verdi prophets, army commanders, and freedom fighters in the decade of *Risorgimento* (in that case in the period 1848-49 – P.K.)." (Batta 2005, 29). The message from Norma was very clear for Italian patriots from 1831, especially soon after the Carbonari uprising fell. The famous choir *Guerra, guerra ("War, war")* illustrates the preparation for the insurrection. "The proclamation of the fight against the hated 'eagle's lair' and 'the city of the Caesars' did not go unnoticed in Milan, the base of the Habsburgs, any more than the stirring, elementary force of the chorus of '*Guerra, guerra*' (Batta 2005, 29; Kimbell 1991, 514 and ff.). In *I Puritani*, the most characteristic part is the heroic duet from the second act, *Suoni la tromba* (*"Sound the trumpet"*), which is a

patriotic appeal. A very expressive section starting with the words "Patria, vittoria, onor" was censored and the word *libertà* (*liberty*) was changed to *lealtà* (*loyalty*). The work also has a very important trumpet part starting the march motive melody that became an unofficial anthem before 1840 (Brunel 1987, 69–71).

Verdi as an Inspiration for *Risorgimento*

In 1815–1830, the second most popular type of opera was engaged operas with clear political purposes, and written to support a particular ideology or cause, as composers usually took sides in these conflicts. For instance, Rossini's French adaptation of his earlier Italian opera *Maometto II* under the title *Le Siège de Corinthe* was a clear allusion to the Greek revolt against the Ottomans Empire in 1826. Its presentation of the Greek community – a choir of warriors led by a priest against Turkish invaders, is the best example of commitment to the idea of independence. Moreover, great artists like Byron and Delacroix also supported that revolt (Condé 1989, 82–83; Sandalewski 206–229; Batta 2005, 540–543).

In Italy, political allusions to actual situations can also be observed in Verdi's "Risorgimento" operas. The best example is *Nabucco*, firstly performed in 1842 in Milan. The famous choir *Va pensiero* sung by Jewish slaves in *unisono* is the finest expression of yearning for a homeland. The plot of *Nabucco* is dominated by community conflicts, and the opera was immediately a great success. It was also acclaimed by other composers – both Rossini and Donizetti (the latter was present at the premiere of *Nabucco*) admired this opera. It is worth mentioning that following Giuseppe Mazzini, the leader of the Italian radical patriots, this opera showed a new design for Italy and referred to the moral responsibility for achieving a united country (Cohen, 2013, 5; see also Batta 2005, 671).

Verdi's later very popular operas, such as *I Lombardi* and *La Battaglia di Legnano*, are also examples of patriotic, and in some sense, national operas. During the revolution of 1848-49, melodies from these operas became street melodies. Everyone was whistling or humming fragments from Verdi's operas, which were also used as a call sign. After the failure of the revolution, Verdi still remained a symbol of Italian unification, and his name even became a symbolic acrostic (Viva Verdi! i.e. Viva Vittorio Emanuele Re D'Italia!). His operas were performed in Paris, including *I Vespri Siciliani*, when the French-Piedmont alliance became a fact. (Batta 2005, 672–675; 688–689; Cohen 2013, 7).

The opera in the first half of the 19th century was still a universal phenomenon, both in their librettos (most written in Italian and French) and in their music forms. The national schools emerged after 1850, when artists preferred to adapt texts in national languages based on historical events and took inspirations from authentic folk music. Earlier, there was a universal, conventional musical canon in the forms, melodies and harmonies used by composers to describe national, religious, regional communities. Within this tradition, for instance, Meyerbeer used the original choral melody "God is my castle" to present religious community in *Les Huguenots*. Conventional means also served to characterize the Turkish invaders in Rossini's operas, including instrumentation (rhythm and percussion) and "oriental" melodies (Coudroy 1985, 13 and ff.; Krzywoszyński 2013b, 580 and ff.). Religious differences were represented in Halévy's *La Juive* by a clear dissonance, i.e. different tonalities, with one played as an illustration of work in Eleazar's manufacture and the second as music from the cathedral (Pierrakos 1987, 20–21).

Not surprisingly, in earlier stage pieces for the stage, we can also find musical illustrations of political conflicts. For example, in the court of Louis XIV and Louis XV, *tragédie lyrique* was used to glorify the king's power, and the plot contained many allusions to the current situation, such as in Lully's *Thésée* and Rameau's *Les Indes gallants* (Malignon 1960, 139–143; Porot 2009, 62–63; Demuth 1963, 77, 147–171). In classical operas, conflicts were not presented as particular historical examples, but were rather universal, dramatic stories focused on the fate of the protagonist, such as in Gluck's *Orfeo ed Euridice* or Mozart's *Idomeneo*. This was both a consequence of Enlightenment ideology and its vision of world, and due to the fact that the audience was different, being mostly derived from the aristocracy (Demuth 1963, 184; Prod'homme 1985, 117–118).

In the second half of the 19th century, when the unification of Italy and Germany became a fact, and colonial conflicts and rivalries changed previous ideas about international brotherhood, operas from national schools became much more popular. These were written in national languages, featured folk dances and music with original tribes and harmonies, and were based on national legends and stories. This trend was visible not only in empires like Russia, but also in nations that did not possess at that time their own country, like the Czechs and Poles.

In some cases, opera served to legitimate authority, like Mayr's last opera *Demetrio, Re di Siria* in 1823, performed soon after revolutionary

actions in Savoy and Modea. (*Demetrio* premiered in Turino in the Teatro Regio in 1823.)

> This opera was closely linked with the political situation in Turino and changes on the Savoy and Modean throne, which inspired revolution: 'Rivoluzione Piemontese' by 'Carbonari' and Carlo Alberto, the new ruler had to enact a liberal constitution, but his cousin Carlo Felice returned and rescinded all the agreements; both the liberal constitution and the forces of reaction were against the revolution, so Mayr, who was popular in Turin, was asked by the king to compose an opera in the old style to honour authority. (Winkler 2012, 13–16)

The late operas created or reworked by Verdi showed that unification did not always result in a happy ending for local movements. In both the late version of *Simon Boccanegra* and in *Don Carlos*, the composer warned of the hidden dangers in collectivity, which can be easily manipulated. The enthusiasm of earlier "Risorgimento" operas had passed. Nationalism as an expression of international brotherhood was slowly replaced by chauvinism; after the unification of Germany and Italy, both countries, instead of cooperating, engaged in rivalry and efforts at domination (Cohen 2013, 9–11).

German Search for Opera Tradition within Musical National Identity

In the 19th century, Germany was, like Italy, divided into various small kingdoms, duchies and even free cities. However, unlike Italy there were no original operatic tradition, and operas were usually based on Italian and French musical works (Kozłowski 2009, 16–17). Paradoxically, it was the Bavarian origin composer Johann Simon Mayr and his work had a fundamental influence on the operas of early romantic Italians composers. He brought German musical traditions (oratories and instrumental music) to the Italian operatic art. Thanks artistic and pedagogical activity of Mayr, his influence on Italian composers like Rossini, Zingarelli, Pacini and young Donizetti (Mayr's pupil) was serious. But Mayr continued the Italian opera style. (Allitt 1989). The first original German opera composer since Mozart was Carl Maria von Weber. His work *Der Freischütz – singspiel* with spoken dialogs based on old German legend, very quickly achieved international success. It is worth noting that:

> This work [...] marked the emancipation of the German opera from Italian and French models [...]. In addition to the magic and supernatural elements, the opera specializes in local color of the forest, peasants, rustic love, hunting, and hunting horns [...] the folk tale, the folk-song type of melody, and folk dances. These elements are rather naïve and nationalist in emphasis." (Boyden 1959, 339)

The libretto by Friedrich Kind also made allusion to the German situation after the Napoleonic Wars (Batta 2005, 838). After Weber's death in 1826, the continuation of the German tradition became problematic. The famous Germans romantics created very few stage works: Franz Schubert composed only two operas, Felix Mendelssohn Bartholdy composed some *singspiel* in his early carrier, but never finished a complete opera piece. Heinrich August Marschner composed operas in the German style (both in language and music), but this constituted the only example, and he was unable to create a "German school". Creating a powerful national style was the main goal of Richard Wagner's artistic life. His early operas such as *Rienzi* were nevertheless based on the French *grand opéra* style, yet this work still had an important influence on the creation of a new German identity:

> In the context of the contemporary German political situation [before revolution 1848/49 – P.K.], Rienzi became a figure representative of the "Young Germany" movement. (Batta, 762–763)

Wagner decided finally to create his own style and genre. He created symbols of a Volk German identity overcoming divisions and used some historical location associated with Germany writ large: the Wartburg Castle, the Rhine, Nuremburg. Believing that myth, not history yields truth, he proceeded to mythologize each of them (Cohen 2013, 9; Batta 2005, 792–793, 832). Finally, the German opera style became original thanks to a new conception of the operatic work, i.e. the music drama (*Gesamtkunstwerk*), a total work of art that synthetized all the arts, and which became a national tradition in Germany in the second half of 19th century, after the failed revolutions 1848–1849.

Phenomenon of the Opera

The 19th-century operas and fragments analyzed above acquired new meaning due to the political situation of the moment, and thus later became symbols expressing regional patriotic attitudes. Sometimes the new interpretations followed the author's intentions; however, in many instances a particular political context changed the original meaning or added very different connotations. Some arias, choirs or overtures were by chance performed at important historical moments, then came to represent, sometimes over long periods of time, particular political stances. Opera thus became a very powerful vehicle for political identity. Even people who were not frequent theater-goers find some operatic pieces representative of their political opinions.

Usually these citations from operas were not literal, and many new arrangements were created by a variety of different artists. Moreover, it became very popular among romantic musicians to write pieces on subjects taken from well-known stage works; this was considered a challenge and a means to prove one's talent and composition skills. Obviously, there were many ways in which 19th-century operas had a second life. Transcripts and extracts from works, arrangements, and variations were prepared mainly for the piano, but also for other instruments, such as the cello or violin. Many miniatures and arrangements were created to popularize great vocal and instrumental works. Instrumental solo pieces also served a role in education, especially for the piano: small forms were often performed in salons during social gatherings. Pieces intended for the salon, teaching, and concerts yielded benefits not only for the arranging composer, but also for original creator. Although they did not bring tangible income, operas by great artists of that time (i.e. Donizetti, Bellini, Rossini, Wagner, Weber, Verdi, Auber and Meyerbeer) owed much of their wider reception to soloists. (Krzywoszyński 2013a, 141–155).

Today, opera can still play a significant role in cultural exchange between regional communities. For instance, since 2001 the Hoffman Opera Festival (named after the composer and writer Ernst Theodor Amadeus Hoffman, 1776–1822), a Polish-German collaboration, has constituted a broad cultural exchange between the Poznań Opera and Polish regional institutions with organizations from Bamberg. These concentrate on musical performances, most of all operas composed and inspired by E.T.A. Hoffman. There are also exhibitions and other cultural events organized by region of Wielkopolska and Bamberg (See Płomińska-Krawiec and Połczyńska 2004). This festival provides an opportunity to rediscover many forgotten works from the époque. Moreover, local festivals in Italy and Germany dedicated to Rossini and *bel canto* offer excellent occasions for cultural exchange and dialogue, such as the Wildbad Belcanto Opera Festival (since 1991) and the Rossini Opera Festival Pesaro. (1)

CHAPTER SEVEN

HISTORICAL CONSCIOUSNESS AND THE EXPERIENTIAL IDEA OF HOME

SULEVI RIUKULEHTO AND KATJA RINNE-KOSKI

Research on regional identities has taken a curious turn: in the conferences and publications of regional scientists the politico-administrative regions such as municipalities, cities, and provinces have attracted the main attention. It often seems that personal, experiential attachment to places and events has almost been forgotten. Administrative borders rule. Only secondary place is given to history – or no place at all. Although regional identity is a social phenomenon it is originally constructed on the personal level in a process where historical consciousness plays a central role (e.g., Straub 2006; Rüsen 2012). However, the whole concept of identity, including collective identity, is hotly debated and controversial (e.g., Lorenz 2012, 28; Ricoeur 2000, 98–128 and the first chapter in this book). Challenging the validity of historical consciousness in similar manner does not seem to be an issue.

This chapter focuses on personal historical consciousness. In this context, regional identities are examined from a highly individual angle of vision, on the level experiences at home. Actually, the fashionable concept of regional identity is put aside and other conceptual tools are brought to the fore. Historical consciousness and the experiential theory of home form the main elements in this conceptual framework. The experiential theory of home is not yet a fully developed theoretical construct. We use this concept to refer to the ethnographic research focus on home that has been – and is – of great interest in the University of Helsinki, Ruralia Institute. Home in the larger meaning of *Heimat* (i.e., not only house or family but the larger personal attachment to homey places and memories of whatever kinds) is here under examination. The personal, experiential point of view is also under focus concerning historical consciousness. This

means that when we operate with historical consciousness in this chapter, we direct our main attention to the experiential, personal level.

The role of historical consciousness could clearly be seen when people's perceptions of their home were researched in South Ostrobothnia, Finland. The research data were created by ethnographic methods in 2012–13 in the Kuortane region. The informants were heard in groups. Special interest was shown in their personal memories and their descriptions of homey landscapes. The memories and landscapes revealed in the data were understood as interpretations of their home. Both important places (geographical interpretation) and important events (historical interpretation) were identified. The research data were created in 2012–13 in eleven group discussions, four out-door group walks and one group drive (a discussion held in a minibus) involving a total of 116 informants. The introductory results as well as the comprehensive documentation of all 16 productions are published in Finnish in the report series of the University of Helsinki, Ruralia Institute (Rinne-Koski & Riukulehto 2013; Riukulehto & Rinne-Koski 2013).

As comparison material we make use of previous data that were collected in 2012 in the neighboring region of Nurmo by Timo Suutari and Sulevi Riukulehto in ten group discussions with 124 informants (Suutari & Riukulehto 2012; Riukulehto & Suutari 2012).

The material resulting in group discussions is enormous: more than 30 hours of material were recorded in Kuortane and 25 hours of material in Nurmo. Rich data can surely be utilized in many ways for decades to come. In this chapter we first illustrate the theoretical principles of an experiential theory of home. After a short introduction of methods and data we focus the main attention on the borders of home. It appears that the areas people interpreted as home did not follow municipal borders. The experiential home was often smaller and sometimes larger than the municipality in question.

In space and in time

People live in space and in time. We are unable to exist outside of either one of them. But space and time are entirely unorganized and chaotic frames. They only acquire meaning in personal experiences. This idea borrows from the Heideggerian conception of place as lived and experienced space (Heidegger 1954/1971, 152–). The world around us (both spatial and temporal) needs to be experienced. A certain point in space will become specific when it is infused with meaning. It thus becomes a place. Place seems to be heuristically more defined and more

specific than space. For example: a book is put on its own place in a bookshelf (Blunt and Dowling 2006, 3).

This Heideggerian approach has plenty of sympathizers among human geographers, social scientists and architects, such as Yi-Fu Tuan, Paul Ricoeur or Christian Norberg-Schultz. (1) The more specific a place is the more important we feel it to be. It may be a home, a pub or a fishing place – or, indeed, it is my home, the pub and the fishing place. It can also have a proper name.
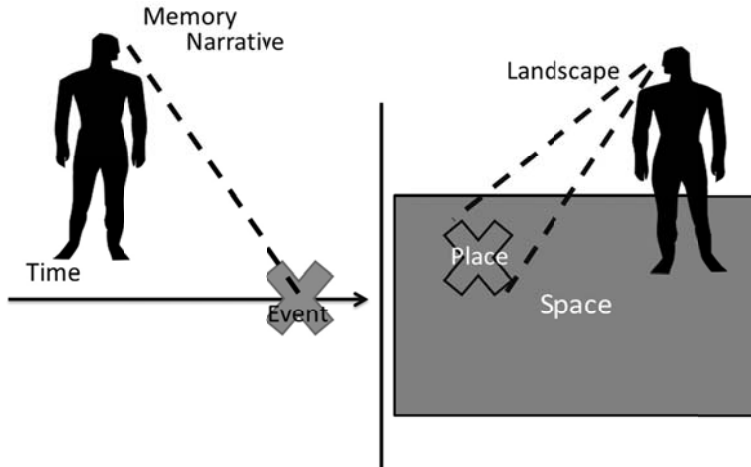
Figure 7-1. Some basic concepts in history and geography.

There are specific points in time, as well. In history they are called events: such as a wedding day, an inter rail trip, Victory Day, or the Tsunami. Also such processes of longer durability as establishing a relationship or joining a community are usually understood as events. Ernest Labrousse's distinction between structures, conjunctures, and events was made famous by Fernand Braudel (Ricoeur 2000, 28, 244; Braudel 1969). An event may be personal in nature or it may be important because it has a notable general meaning. Analogically a place may be important for personal reasons, or it may have a common significance that makes it valuable for everyone (as individuals) and for all together.

Everyone can name places and events that are important and meaningful just to him or her. We refer to these kinds of places and events as key factors marking the idea of home because they have a specific role, a key role, in an individual's experience of home. They are the places and

events that are remembered. Stories are told about them. They are in a specifically valuable position in forming one's experiences of home. They are felt to be homey.

Certain places and certain events belong together. We do not usually imagine a place without events. This became clear in the group discussions in Kuortane. When informants were heard in the field (in those places that are meaningful to them) they did not begin to define the opening view but rather the events that occurred there. They told about events that were important to them or to the whole community. The meaning of a place is based on the fact that it has been the staging ground for a certain event. Such pairs of places and events are illustrated in Figure 7-2 (a view to Salmi in Kuortane, Finland): the home yard with its games of childhood; the Salmiranta lakeside where villagers learned to swim and where they have their weekly ice swimming during the wintertime; Piiskoomänty, the old tree dominating the village. It serves as a meeting point where many events worth remembering have occurred.
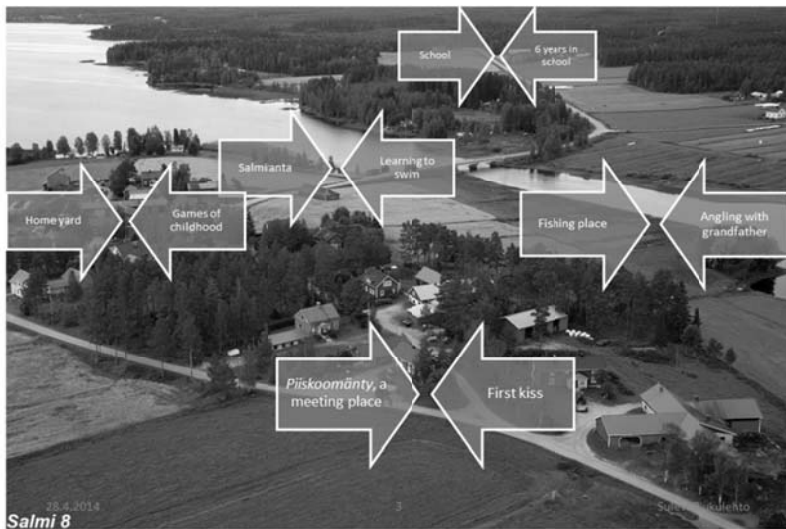
Figure 7-2. Home (as *Heimat*) is composed as the network of key places and key events. Picture from Kuortane, Finland.

There is also the riverside where someone used to fish with a grandfather and further away down the road is the elementary school with all its memories of learning. Over the years the living space becomes

entirely filled with these kinds of memory pairs. This is how home is composed as the network of key places and key events.

The same kind of picture could represent any homey landscape. It does not matter where one looks, meaningful events and places are cumulated everywhere: here the first kiss, there a car accident… All the memories are not pleasant, but all together make a region a place full of importance and meaning. This kind of home has a special word in many languages: the German world calls it *Heimat*, the French talk about *son pays*, in Swedish it is *hembygd*, in Spanish *patria chica*, in Polish *mała ojczyzny*, in Finnish *kotiseutu*, in Czech *domov*, etc. (Blickle 2004, 2–3; Fernandez Manjón 2010, 17; Řezník 2009, 239).

Home embedded by experiences is always unique. No one else can have exactly the same experiences. Thus, experiential homes are not identical but always individual. Obviously, experiential home thus understood is a universal phenomenon. Everybody has events and places that are experientially the most important for him or her. These key factors of home are more meaningful than some other factors. They are homey. They belong to one and one belongs to them. One can live without a house and still have home. One can move dozens of times and still have a home in some certain place or in all these places (and events) together.

In research work home can be revealed in the key factors. However, it is important to notice that the key factors of home cannot be stored away. Places and events cannot be put in pockets or conserved in bottles. An event is a temporal phenomenon. When an event is over it stays behind and cannot be similarly returned. Place is tied to geography. It cannot be identically repeated elsewhere. The new versions of homely houses in a new domicile are dim replicas only. We still believe in the idea that home is not something that is left behind, but something that is taken to go. Home follows us differently, not in key factors (events and places) but in our interpretations of them.

Place imposes an interpretation on the landscape. It relates to how I experience and comprehend a place. Place must be understood here widely: it is a question of natural environment, built environment and socio-mental environment at the same time. Social relationships and traditions form a notable part of the experiences of place. Usually the three environments are seamlessly connected together. This kind of interpretation of important places is under question when we talk about natural landscapes, built landscapes, soundscapes, or even landscapes of the soul. Landscape is how I personally see, hear, smell and sense the place. It is the place that is interpreted.

Again, the same holds analogically with the experiences of time. We can differentiate specific points in the flow of time. They are called events and we can take them over almost permanently in interpretations. Although all the interpretations of events have much in common they seem to be easily divided in two groups: memories and narratives (or stories).

Both narratives and memories have come to the fore of history during the last decades mostly due to the influence of the third and fourth generations of French annalists and other French authors. And, again, the influence of both narratives and memories have spread over the other cultural and social sciences. Probably the most influencial works are Paul Ricour's *Temps et recit* (*Time and narrative* I–III, 1983–1985) and Pierre Nora's *Lieux des memoire* (1983–1992) (About the influence, see Piwnica 2014; Mudrovcic 2005).

An interpretation of a personal event is a memory. If we hear about an event from others, we usually call the interpretation a story or a narrative. Story, too, is a kind of memory: it is a commonly shared memory trace of a bygone event. Or the other way round: memories are also narratives, drawn up in one's own mind. They are not virginal in nature but in many ways processed interpretations of what happened.

Despite the analogic interpretative nature there are some elementary differences between memories and stories. Memory is much more personal. It is my remembrance of an event in which I have taken part. Memory can be shared with others, and then it becomes a narrative. Narratives connect us to community; they convey know-how, historical knowledge, and traditions and link our own interpretations to common property (knowledge). Our personal historical consciousness consists entirely of personal memories and the narratives shared in community with others. The interpretations of events are self-made but they are always made in interaction with other people and the environment. For example: the historical details of home are mostly obtained from other people. Only a small part is invented independently (an illustrating experimental research of memory in children's historical consciousness is Létourneau and Moisan 2012; see also Lorenz 2012, 24).

Time, event, and story (or memory) are basic concepts in history just as space, place, and landscape are in geography. Two rich research traditions have emerged from these conceptual baskets. Often it seems that these traditions could talk to each other more. Quite commonly we choose either of the two traditions as frames of research. However, plenty of phenomena simultaneously employ both frames. Such a phenomenon is experience. It is always situated at the intersection of time and space. If we

open up and define the experience of home, for example, we need both geography and history. We have to study both landscapes and narratives. It is hard to imagine an experience where time and space would not meet. Place is a geographically basic concept, but in practice it requires history: Space becomes a place when it acquires a specific significance. This usually means that something happens in a place. Analogically, events and even history itself would be difficult to consider without connection to named particular places. Things always happen in places.

Historical consciousness

At the beginning of the Introduction to his Philosophy of History Georg Wilhelm Friedrich Hegel coined a concept that is helpful also in this connection. He distinguished three main stages of historical consciousness: original, reflective, and philosophical. In Hegel's reasoning they represent three levels in historical self-consciousness. The first one is common awareness of the past: the simple understanding of historical processes, the passing of time and the possibilities for development. Every mentally healthy human being is able to become conscious of time at this level.

On the second stage (reflective consciousness) an individual becomes conscious of his history-nature. He recognizes history and produces history intentionally. Hegel also distinguished four sub-stages, each of which are more aware of its historical nature than the former. On the third level of consciousness (philosophical consciousness) one can reflect on history critically and rationally. According to Hegel not everyone, not even a majority of people ever reach this third stage. Hegel's classification has been successful. It has been improved on and applied in new contexts (White 1973, 81–131; Rüsen 2012; Straub 2006, 62). We here apply the concept of historical consciousness in the field of home experiences.

Historians and philosophers of history have usually been interested in the two higher stages: the Hegelian reflective and philosophical consciousness. They have quite understandably focused on the consciousness that can be recognized in history books, documentary films or academic historiography. The original, every-man stage of historical consciousness has often been left aside by historians. Perhaps it has gotten more attention in the fields of ethnology, anthropology, and oral history.

All the stages of historical consciousness are relevant in connection to the experience of home but the first one is obviously the most important. Everybody has personal historical consciousness: each one has his or her own memories and narratives heard from others. It is hard to imagine any kind of self-view or world-view without historical consciousness in an

original form. If identity is an answer to the question "who am I?" then historical consciousness is an elementary condition for personal identity, as well. Without memories, self-identification cannot obviously be made (Bamberg 2011; Polkinghorne 2006, 4–5).

Experiential home is history and geography
of the personal

Home in a general sense is a place, usually a house or a room, where personal belongings are conserved, where leisure time is spent and where family members are living. Not all people necessarily have this kind of home. We do not all have relatives or do not all live in the same place; all people do not necessarily possess property – so, they are not in need of a place for movables either. One can live all his or her life on the move as a migrant, derelict, or vagabond; nights can be spent in hotel rooms or even in sleeping cars on the railroad. Home in the meaning of a house, apartment or a room does not then exist. But all people – even derelicts and migrants – have personally important places and events of which they have processed their own interpretations: familiar landscapes and meaningful memories of events and human relations. In these physical and mental landscapes one feels at home, even if we cannot show any one a physically limited place that alone would carry the name of home.

In the traditions of human geography and history of *Heimat* home is more than a house or a household. According to David Morley a person is at home in the rhetoric of those with whom they share a mutual understanding of life. Home is where you can be recognized by others. The extent of the space in which a person may feel at home can vary – from the space of a house to that of a street, a neighborhood or a whole country (Morley 2000, 48). Home is multi-scalar phenomenon and imaginary place (Marston 2000). Feelings of belonging and relations with others can be connected to a nation or a park bench (Blunt & Dowling 2006, 29).

The first experiences of home begin to accumulate right from the moment of birth. The first home experiences are spatially quite limited: a parent's lap, the child's bed, perhaps a specific child seat in a car. Only a few of us can remember them; such first experiences will soon be buried under newer ones. The conception of home spreads from house to garden, neighborhoods, relatives, kindergarten, school and hobbies. In the spatial frame, home is experiential and consists in a personal relationship to geographic reality. It is the geography of the personal.

It is easy to see that the experiential construction of home is a universal phenomenon (following Kunnas 2013, 17–18). The first case will automatically take a special status when a worldview is constructed. The first experience of a dog will be the example and the baseline for all the later dog experiences. It will affect the person's general conception of dogs. What do dogs look like; how do they behave; how should I react. By the same token, each concept will have a specific tone on the strength of the first model that gives it its shape. Mother, father, street, school, mountain, lake, and field get their contents based on the first examples. All later mothers, fathers, streets, schools, mountains, lakes, and fields will be compared consciously or unconsciously to previous experiences and the first experience in the line has longstanding specific significance.

This is how home is constructed in the spatial frame of geography. But precisely the same way and at the same time – even in the same process – home is constructed in the temporal frame of history. Things, people, and places that a child meets induce memories and they connect to meanings. If the first-met dog chews a hole in the slipper of a baby this may cause a lifelong fear reaction in the child. The interpretation of the event (memory) may be so strong. If the child can talk he or she may shape the event into a story and transfer the fear onwards. Nearby places and people will play a specific part in the child's mind. A sentimental attachment is caused by personally important memories, in other words: continually cumulating historical knowledge. This is, at its simplest, how personal historical consciousness is formed. In a temporal frame, home is an experiential and personal relationship to history.

Methods and data

An outside specialist cannot indicate the key factors of home as *Heimat* because of the purely experiential nature of the home experience. The key factors have to be gathered from the inhabitants themselves. This formed the point of departure for data collection in both the Nurmo and Kuortane cases. In order to form an overall picture of the perceptions of home in the Kuortane region eleven group discussions were organized. In four of them the discussion was followed up by outdoor group walks. In addition one group drive (a discussion held in a minibus) was arranged. Discussions were organized in every village by Lake Kuortane (see map, Figures 7-3 and 7-4). Three group discussions were held further away from the lake in order to collect comparison material for the lakeside discussions that were the main target area of scrutiny. In addition to geographical coverage it was also important to reveal the perceptions of different types of residents.

This is why special discussions were also arranged for scouts, high school students, pupils of the secondary school, and summer residents.

Figure 7-3. Kuortane, Finland.

Group discussions and written exercises

Group discussions were started with a short introduction to the research project. A series of aerial photographs of Lake Kuortane was shown as a prelude. Participants were encouraged to reflect on their home in all its diversity: the natural and built as well as the mental and social environments. Researchers emphasized that any subject or theme would be relevant in this discussion if it feels necessary to a participant. The discussion was paced by a set of stimuli that were presented one by one. The stimuli were simple-formed pictures, questions and words. Researchers' role was mainly to listen, to set the pace for stimuli and to avoid guiding the discussion in any predetermined direction.

The themes included in the framework of stimuli were:

- the content of home
- home described to outsiders
- home as a photograph

- natural, built, and mental home environments
- home shaped by events
- the prominent figures of home
- how a place becomes a home
- the changes in home
- what must be conserved in your home?

In addition to these stimuli two written exercises were included in the framework. First, participants were asked to name one to three important places of their home. They should also tell what made the chosen places important. Finally, an empathy exercise: participants were asked to imagine the future of their home area after five years. A frame story was given and they were asked to continue the story according to their own ideas. They could choose either negative or positive prospects. Written exercises were added to the framework to ensure hearing every participant. Not everyone feels comfortable participating in vivid discussions in large groups, or wishes to explain in public ones' personal or sometimes even intimate experiences of places. Written exercises gave participants an opportunity to express themselves more privately.

The same framework of stimuli and written exercises was used in all the discussions. The exercises were only slightly focused according to the needs and situations of the groups. Thus the commensurability between different discussions and different people was secured. The contents and emphases developed freely over the discussions following the profile of participants and regions while stimuli stayed the same.

Group walks and group drive

An outdoor group walk is simply a group discussion realized in the field. In Kuortane walks were organized immediately after the group discussion. The participants were asked to choose the destination so that the route could easily be done in one hour, discussing interesting subjects during the walk and stopping if needed. The stops were not decided beforehand; only the destination and route were chosen.

The participants chose destinations where important events had happened and places that reminded someone of an event like a memorial. During group walks people did not usually define landscapes or geographic places per se, but expressed narratives and memories of their attaching events. Some of the stories were personal memories; others had a certain meaning for the whole community.
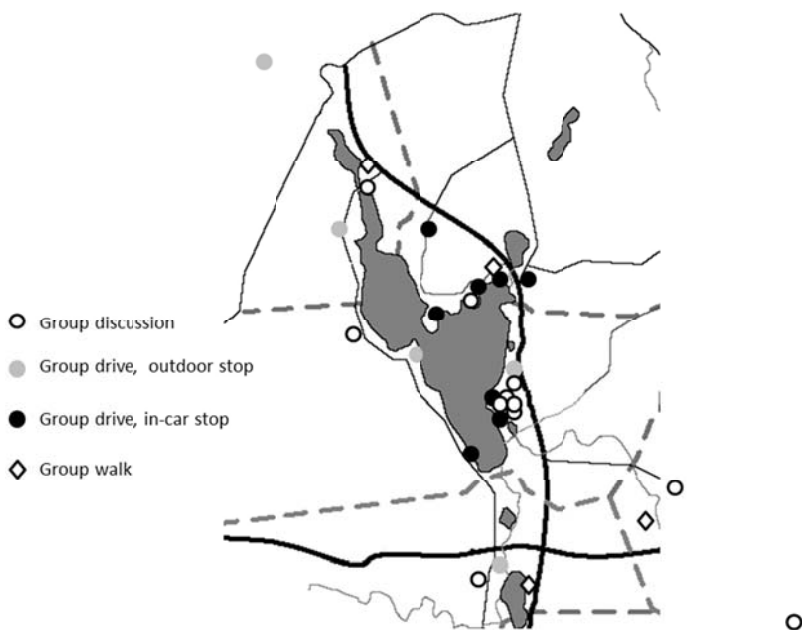
Figure 7-4. The compilation of the discussion sessions, group walks and group drive in Kuortane 2012–2013.

A group drive is (analogically to group walk) a discussion organized in a mini-bus. Lake Kuortane was circulated during the drive. The route with seven stops was planned in advance and time was also reserved for extra stops suggested by participants. A short group-walk discussion was actualized in each of the seven planned stops. The bus was left in order to better see a certain object and to talk about it. During the spontaneous extra stops informants stayed in the mini-bus. The stop, however, afforded an opportunity for a deeper discussion.

All the sessions (group discussions, group walks, and group drives) were recorded and transcribed. It forms 35 hours of recording and approximately 300 pages of transcription material. Besides, the contents of the sessions were summarized in book form (*Kotiseudun kerroksia Kuortaneelta. Kuortaneenjärven lähiympäristö kotiseutukuvassa*, in Finnish only). The publication also includes a detailed definition of the applied methods and abridged letterings of the central discussion themes in each session. Precise and free-access discussion documentation was considered essential because the discussions compose the framework of

interpretations and conclusions presented in a more academic manner in subsequent publications. The book is also illustrated with a rich collection of photos of the important places, objects, and persons mentioned within discussions.

Monolocational, multilocational, and non-place-based homes

People's conceptions of home can roughly be divided into three main groups concerning the meaning of place: some people live their whole life or the most part of it monolocationally, in one permanent place; others move from one place to another, living in multiple dwellings in succession or in parallel. Their home is multilocational. Place has an essential role in both monolocational and multilocational conceptions: the home is anchored to a place or even several places (e.g., Gustafson 2001). In addition, we can identify conceptions of home that are not place-based in the same meaning.

The people who have lived whole their lives in one place often think that they could not have their home anywhere else. They see home as an anchor place, a unique place in the world (Dovey 1985). In their conception of home the geographic territory is emphasized more than social or mental environment. Children and young people often agree just because they have always lived in one place only.

In Kuortane the traditional monolocational conception of home is easily and deeply linked with the agrarian way of life. The beginning of agriculture and permanent housing meant that people henceforth had one central location where their life was fixed. Living on the move stopped and the home remained in one place. Home and homey landscapes became stable, fixed points. New buildings, roads, and fields were established. Neighbors settled down into their dwellings. The social network became tighter. The monolocational lifestyle meant that most people spent their whole life in one place. Marriage could move an individual to a new place but probably not far away, however.

> It's something brilliant to live in a hundred-year-old house. It may be cold in winter and so on. […] We buried in the spring […] the last one who was born at home. (2)

> My own home, too, has a long story and long traditions and the timbers that there still are in the house have seen many, many generations. It is the kind of characteristic that awfully many people don't [have] or many, especially the young, don't have experiences about it anymore. (3)

> Oh well, my home has passed from generation to another within the Keski-Kulju family for five generations, and I am familiar with the place myself and I feel a closeness even to the furniture, which has run in the family for several generations, and the landscape which has not changed that much during the periods of time. (4)

> Seldom have farmers had opportunities to live somewhere else. […] Also I have lived all my life here. […] So I don't have any benchmark of comparing. The former generation has been talking about being away because of the war, but my generation has not been away [from home] except for military training…   Well, one winter at school in Alajärvi [municipality nearby] living half at home […] you may attend even high school living at home. (5)

Monolocational life imbues a strong sense of home. The home site is felt to be unique and its landscapes acquire specific significances.   Every grove, river bend and boulder, every house, granary and duckboards resonate with memories. Emotions accumulate in familiar places and they are felt to be important.   The influence of bygone generations and the traces of history are stratified in homey sites and landscapes in a way that cannot be fully shared with outsiders.

The monolocational conception of home is still natural and commonly known. This could be clearly heard in the group discussions and group walks arranged in Kuortane. Many informants who had lived elsewhere for a long time or contemporarily said that it was impossible for them to become rooted in a new municipality, no matter if it was just in the neighboring town or further away on the Western coast or in the Northern part of the country. Nowadays this kind of monolocationality seems, however, to be decreasing.

> I have made two detached houses built over there, in Seinäjoki and well…
> I have always thought of them more as accommodation than as a home. So,
> I have always had my home about kilometer that way. (6)

Instead, life has become multilocational. Moves have become commonplace. For most of us a move is not a unique happening. There are many phases in life: people leave their birthplaces because of studentship and jobs. It is not uncommon to move five or ten times. But the present-day multilocationalism is not only a question of migration. It has other manifestations: People have parallel homes. Relatives and family members may live at a distance. Cottages and second houses, working places, activities, even daily shopping centers may be situated in another locality (e.g., *Monipaikkaisuus* 2011; Hilti 2009, 148–149). The conception of

home changes along with the situations of life. New oases of home may be far from each other and they can be compared to the first home.

When home is understood as *Heimat*, when it is a room of experiences, full of personal interpretations of events and places, then home is necessarily unique. The geographic bounds of home vary individually. One can have several homes one after the other and at the same time. One's personal idea of home includes them all. This has been noticed many times in migration research (Wyman 2005). The new country has become as important as the old one. The phenomenon also occurs in the case of multilocationality in one country.

People living multilocationally notice that they often seek similar features in their various oases of home. Those who have lived by a lake in Kuortane have also gravitated to a lakeside in their new place of residence. Water was similarly a necessary factor in their first and second home, at the cottage and will be in future homes too. The one who likes skiing in Kuortane will probably ski in his or her other anchor places as well. We seldom stop to think about this. It may be surprising to find that one's own, homey way of life follows the same guidelines everywhere one sets down.

I am terribly active in skiing in Tuusula. We are there on the lake all the time with my husband and here [in Kuortane] the same madness goes on again. […] I also cycle around Lake Tuusula, as I do here as well. The lake is just a little bit smaller, twenty kilometers around. […] Now I just realized that there must be a connection somehow. (7)

It's fascinating that I have always lived by water. In Seinäjoki that was not the case and I was longing for it all the time. So, clearly a part of Kuortane is the lake here, or at least it is a part of my home. (8)

One of us got married and moved to the Ylipää neighborhood. He was missing water because here he was living on top of the hill with view to a lake. He missed water so much, that he had to fill up a big bowl of water and watch it for a while in order to ease up the longing for water. It was so important to him. (9)

Kuortane is my home. I was born here. I lived here for 19 years. I have always carried it [Kuortane] in my heart and have spent much time here. I have been living 29 years in the metropolitan area of Finland and 18 months in Canada, but it has always been Kuortane. I actually got myself a tattoo right here in my arm: Kuortane municipal coat of arms to prove where I am from. (10)

Actually, we can doubt if experiential home can ever be a coherent, unbroken area. Some parts of neighborhoods are always known better than some others. There are bare spots and irregularities. Life is concentrated in certain familiar places with a network of connecting corridors (roads, railways, and other itineraries). In reality, we easily identify the immediate surroundings of our own dwelling, school, working place, summer cottage, the houses of relatives and neighbors and the routes between them. When informants discuss their home they think about this kind of network formed by oases and corridors of home (Riukulehto 2013, 52–54).

Although a dwelling has a certain role when a sense of home is constructed, we should not overestimate its significance. One's own house or other permanent residence is not an indispensable requisite for a sense of home. Migrants, vagabonds, and cosmopolitans, for example, may live permanently on the move but still have certain personally meaningful places, where valuable experiences have been felt and where memories spring from. (In a way they are "everywhere at home," Peters 1999, 30; Naficy 1999, 3.) They surely live in places, as well, but the role of place in their idea of home is different from the place-based conceptions that dominate among the permanently settled-down inhabitants.

> I don't know what it is, but if I spend more time in my other dwelling place, like in my hometown, I soon will miss being here [in Kuortane]. And the other way around, if I have been here for a longer while, I'll be missing home. There is something different, you always want to be in the other place. (11)

> Well, I am living multilocationally now that I am originally from Mikkeli [municipality located in Eastern Finland] and my workplace is located in Jyväskylä [city located in Central Finland] and my husband is working in Vaasa [city located in Western Finland] and we spend almost every weekend here [in Kuortane] and visit Mikkeli every once and while. […] But this has been very interesting excursion for the last twelve years or so. […] Originating from eastern Finland I still wait for the forest to begin, where there are forests and houses I'm used to. But nowadays I am already accustomed to this landscape. (12)

The place itself is less an important factor than its interpretation when one is constructing the personal conception of home. The interpretation is experiential: the idea of home is formed by living, by gathering and exchanging experiences. Interpretation is partly conscious, and in a greater part unconscious. The landscapes can be detailed, outlined, and grouped in many ways. We talk about natural, cultural, and mental landscapes, for example. They can be familiar and homey or they can alternatively be felt

strange. The sense of home is originated in this kind of interpretation. We live our landscapes as our home. Although we lead the interpretation process, we are also manipulated. The role of education, teaching, and communication is immense. Interpretations are always made in interaction with other people and the environment. The original historical consciousness is strongly influenced by other people.

One feels at home when he or she recognizes the landscape around as close, meaningful, and homey. This is my landscape – whether it is nature, buildings and roads, sounds, colors, or the complex ensemble of manners. This is how we use to act hereabout. It is a question of one-of-usness, the sense of belonging. I belong here and this landscape belongs to me. These kinds of interpretations are constructed by everyone, also by the homeless and by cosmopolitans alike.

The borders and accumulations of home

Although the combination of home experiences is always personal and unique, many key factors of home are, however, commonly shared. Other people living in the same region and in the same situation of life have corresponding experiences of similar events and places. Experiences of home are personal but they also seem to spatially accumulate in communities. The same places and events are repeated in people's memories and narratives. The differences and boundaries between such accumulations are so obvious that they can be mapped. It is important to understand that the accumulations or loci of home do not follow municipal or any other administrative borders.

The data were explored in three classes. First, the natural environment was taken into focus. Six subcategories of natural environment were sketched (water systems; hills, mountains and vantage points; forests; fields and meadows; species; specific natural objects). Second, attention was directed to the built environment in ten subcategories (peasant houses; cottages and second houses; religious constructions; common halls; places for sport and exercise; municipal constructions; industrial and commercial buildings; logistic constructions; monuments and other memorials). Third, the invisible part, the mental or social environment was covered in ten subcategories (customs and manners; religion; civil movements; hobbies; food; traditions; historical events; language; kindred and ethnic relations; important persons).

In the Kuortane data every person seems to have a specific, unique perception of home that has been built upon and is continually being constructed from their personal experiences. The key factors of home, however, concentrated also on three sub-regional accumulations. This

means that the people living in the same area paid attention to the same homey places and events. They mentioned the same built and natural objects (such as Piiskoomänty in figure 7-2), they told versions of the same stories, they named the same important persons and so on.

As a result, it seems that in Kuortane the main accumulation of belonging lies densely around Lake Kuortane. Those who live there do not usually have important homey places for events far from the lake. Further, in Kuortane all the main villages seem to constitute smaller loci within the orbit of the main accumulation.

The informants who live further away from Lake Kuortane seem to have a larger accumulation of home. They have key factors situated around the lake but also further from the lake. Again we can distinguish smaller loci, but they are not as clear as the loci within the main accumulation. The clearest example is the home accumulation of the Mäyry area with Lake Kuhajärvi playing a significant role.

People's experiential conception of home does not follow any administrative lines (such as municipalities). It seems that the more important unit for regional identity is their experientially constructed idea of home (*Heimat*). It has a primacy from the individual's point of view because it is the first regional identity one has. Little children manifest home in simple forms (the home building, yard, parents, norms, etc.) much earlier than they can imagine more abstract regional structures, such as a municipality or fatherland.
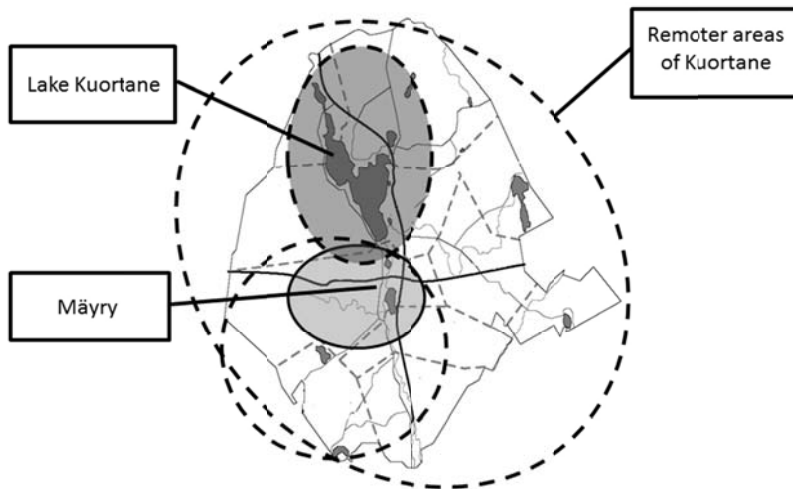
Figure 7-5. Loci of home in Kuortane 2013.

In Kuortane the impact area of home may also be mapped according to the changing surface structures of nature, characteristics of the local people and differentiation of local dialects. These were expressed and acknowledged very clearly in the data and seemed to be sustaining elements of creating and maintaining the feeling of home and identity. These are visible elements especially to newcomers.

> In my case the home consists of nature and the way Kuortane is positioned in relation to Southern Ostrobothnia. As seen in photos in the beginning of this session, nature starts to change as Suomenselkä [the watershed region] approaches and the landscape is becoming flatter. [...] And the character of the people is very Southern Ostrobothnian but it starts to mix with other tribes because the dialect border to Lehtimäki is located near these villages. (13)

> [...] When you go to Alavus and pass by Sulkavankylä to Virrat, the landscape is different and the dialect is different. (14)

> Neighbors living in Töysä – though living as near to me as the neighbors in Kuortane – they have totally different dialects. And the dialect border was really visible to me, as I came from elsewhere. [...] I live right by the border of Töysä. (15)

Similar results can also be drawn from the previous data collected from Nurmo 2012. Two clearly differing loci of home could be distinguished there (Alapää and Koura, see Figure 7-6). Besides, three sub-loci were recognised (Hyllykallio, Kiikku, Ylijoki). Again, people living inside of a locus named the same places as their key factors of home. They told the same stories, and they shared the same memories. The key factors both connected and differentiated loci. If the commonly shared key factors of the natural environment differed between two loci, the factors of the built and social environment differed as well. A region is forming one's insight and comprehension, which influences his or her historical consciousness.

Important places (i.e., specific points in space) matter when people experientially form their conceptions of home. Important events (specific points in time) matter, too. Events and places are not separated in memories. Home is a personal relation to both history and geography at the same time. In short, home (as *Heimat*) means the totality of the things among which an individual feels at home.
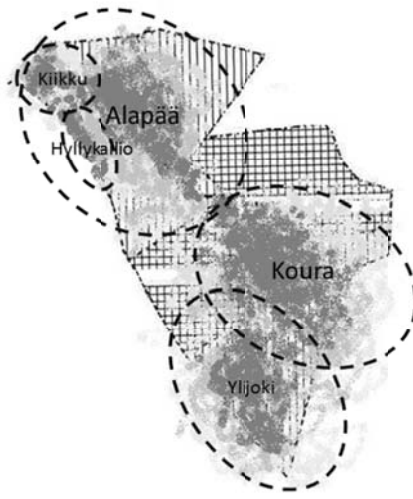
Figure 7-6. Loci of home in Nurmo 2012.

NOTES

Chapter One

(1) This is the driving theme in the great book edited by Sterling Evans, for which I am in debt at many points in this chapter: *The Borderlands of the American and Canadian Wests. Essays on the Regional History of the Forty-ninth Parallel*. Sterling Evans (ed.). University of Nebraska. Lincoln 2006.

Chapter Two

(1) This chapter was prepared with financial support from Charles University Grant Agency project 632913: "Geosocial Regionalization: General Questions, Methodological Approaches and their Verification" and the Czech Science Foundation project P410/12/G113: "Historical Geography Research Centre".

(2) In this text we understand the term homeland (*vlast*) similarly to German *Heimat* as emotive perception of national territory. The reestablishment of man-homeland relationship is one of primary aspect in the process of national revival.

(3) Blaník is a mythological mountain south-east of Prague. According to legends, the large army of Czech knights led by St. Wenceslas is resting inside the mountain. The knights awaken to help when the Motherland is in the greatest danger.
Jan Žižka z Trocnova (c. 1350–1425) was Czech general and Hussite leader.
Alois Jirásek (1851–1930) was a prominent Czech writer of the National Revival.

(4) The city of Tábor was founded in 1420 by members of Hussite movement and became an iconic place of the Hussite resistance. Therefore, the Hussites became known also as the Taborites.

(5) The true end of the communist era was in 1989. On the other hand it took some time to change the regional structures.

Chapter Three

(1) See also the WISER programme at the University of the Witwatersrand, South Africa in which space as prominent feature in regional and or local histories does not go unnoticed. As example see "Curating the Afropolitan City. New Ethnographies of Johannesburg" as discussed by the Group on 12–13 August 2014.

(2) Manning 2003, 172. It may be argued that the nationalistic focus in history as visible in several countries had also marginalized the view and vision with which

history was practiced in traditional times as also pointed out by Sulevi Riukulehto in Chapter One of this publication.

(3) This research was made possible with funding awarded in 2013 by the National Research Foundation of South Africa. The opinions that will be expressed in this abstract (and paper to follow) is that of the author and not the NRF.

(4) Saunders 1990, 131–140; Eloff 1986, 1; Bonner 2010, 3–27; Van Eeden 2014c, 118–140. Several historians and geographers have in the past deliberated on the concept of what is region in regional history and what is local. The energy from author's side is simply muffing to, again and regularly, saddle this contentious horse as part of this and each discussion on regional history. It is for the moment comforting to know that some practitioners of regional history at least acknowledge the simple reality that regional history studies departs from spaces and places which is inclusive of local and broader regional exposes. See *An Agenda for Regional History*, edited by Bill Lancaster et al. Newcastle, 2007.

(5) The author take note of recent trends in regional history, apparently referred to as "new regional history" and of which it is said also accentuate history, space and time. Also compare Close, 2014, 112–129.

(6) Noor Nieftagodien (guest editor), Special issue of New Contree, November 2013: Covering several articles on some local history research in especially the Gauteng province.

(7) At the time known as such with no clear choices between either regional or local (See Saunders 1990, 131–140).

(8) Compare Van Eeden 2014c; Cecile Jooste 2008 broadly covered a historiography of some first regional historians in South Africa in the first Chapter of her thesis.

(9) As embedded in contributions of Wilber 2002; *Transdisciplinarity* 2001, edited by Klein et al.; Nicolescu 2007 and *Handbook of transdisciplinary research* 2008, edited by Hirsch Hadorn et al. See Van Eeden 2014b, 27–43.

(10) See for example the Regional Studies Association's Global conference in April 2014 in Brazil in which Regional history studies were allocated a special session to.

(11) In historiography the era of "linguistic turn" in philosophical circles (as concept apparently inspired by a philosopher Gustav Bergmann) implied a reference to Richard Rorty's publication in 1968 with the same title in which a pre-postmodernist philosophy is followed that language is a significant but non-transparent tool in communicating science, such as research in History. Though, Marwick asserts that the control of language over the historians is not in cast and stone if arduous care and time-consuming efforts are invested in the writing process. See Marwick 2001, 11–12. Riukulehto, amongst others, probably refers to academics like A. Lüdtke in *The history of everyday life. Reconstructing historical experiences and ways of life*, 1995, Ch 1.

(12) Perhaps Honours and Master students to be very specific, with more specializing themes as consideration on a PhD-level, and the last part of the last criteria point more related to doctoral candidates and historians that continue specializing in the field of regional history.

(13) A space as part of a region that is indeed determined by individual or institutional choice, as this reality will always be the scenario when humans are involved.

(14) The information grid as structure in Table One serves as a draft guideline, which implies more debate and additional discussion and editing.

(15) Iggers refers to a lack of considering the nation-state (thus the broader global processes) in the regional history studies of some members of the erstwhile Annales School in France. See Iggers, 2005, 475 and Meyer et al. 1997.

(16) With reference to the presently known scenario see Van Rensburg 2014.

(17) Focus borrowed from the International Journal of Ecohealth, 2004 & Dominique F Charron et al, Ecohealth Research in Practice, 2012. See also the homepages of International Development Research Centre.

(18) The IMD research project on a mining community such as Bekkersdal will only be completed by Dec. 2015. What is reflected is what has come forth from the variety of primary and secondary resources, inclusive of qualitative data capturing through interviews and inputs gained from multidisciplinary thoughts (research and observations).

(19) See E.S. van Eeden, "The history of Gatsrand from the settling of the Trekker community, circa 1839, until the proclamation of Carletonville in 1948" as on Boloka with the Url http://hdl.handle.net/10394/10805 titled: The history of Gatsrand from the settling of the trekker community circa 1839 until the proclamation of Carletonville in 1948 / Elize S. van Eeden. The original Afrikaans version of this MA-dissertation (obtained at the erstwhile PU vir CHO) is also available at the North-West University, 1988.

(20) By 1918 Government passed an act to ensure that minimum standards for Black housing are in place. This was followed by the 1923 Native (Urban Areas) Act (and consolidated in 1945 after several amendments) which placed the responsibility for Black housing on local authorities. Yet, its housing scheme had to be approved by the former Minister of Native Affairs. See Davenport 1970, 77–96; Union of South Africa, State of the Union, Year-book for South Africa, Economic-Financial-Statistical, p. 99.

(21) Union of South Africa, State of the Union, Year-book for South Africa, Economic-Financial-Statistical, 102–103, 105. To address housing shortages further the Site and Service Scheme by the Native Affairs Department was adopted in 1954 to provide to black families a site after water and sanitation had been supplied. The families then had the opportunity to put up their own shelter on a site until a house had been built. Municipalities could assist these people on a loan basis by providing funding to individuals that should be paid back in 10 years.

(22) Ntsoelengoe, 1989, 11. See also WLM, File 12/1/1 (vol 3): Openbare feeste en sosiale verkeer. toesprake ca 1996- Newsletter Mayor, 01/1/1991-27/02/2002 ; A Tribute to the late Mr MT Letlhlake who was mayor and also a Bekkersdal born resident, 1997.

(23) See reference to 2011 population statistics in conclusion.

(24) Khaba and Van Eeden 2014. Compare RSA NA, KJB, Vol. 462, File reference 2/14/5-3, "Illegal squatting on the farm Zuurbekom", 1945; KJB, Vol.

489, File reference N9/9/3, "Proposed freehold (native) township Zuurbekom no. 9", 1941–1949; Galloway, 1995: 3.

(25) Despite Barak Hoffman of Stanford USA's insight in local government issues in South Africa, his historical knowledge and frequent assumptions on South Africa's local government past should be viewed with critical care. Hoffman ca 2004–2005.

(26) As example see RSA NA, CDB, Source 1/107, Ref. A6/5/2/W27, Beheer oor plaaslike owerhede Bekkersdal. Westonaria, 1988–1989, West Rand Development Board, Open Space Study, August 1985, 1–13, section 3.2 of the report; Collinge 1993, 13; Mokoena, 2001, 5.

(27) Bekkersdal kan opgegradeer word met dien verstande dat inwoners [die] risiko verbonde aan ontwikkeling aanvaar en dat owerheidsinstansies nie blameer sal word as probleme ontstaan nie. Inwoners moet goed verstaan dat [die] hele area tot ['n] sekere hoogte riskant is al word alle redelike voorsorg getref.

(28) WLM IDP 2012/2013; The WLM-IDP statistics has been borrowed by the Westonaria Municipality from the RSA Census data of 2001, 2007 and 2011.

(29) Map and information on the WRDM,
 shttp://www.localgovernment.co.za/districts/view/15/west-rand-district-municipality as retrieved on 7 August 2014. If considering that this region years ago was the hub of economic growth this statement, indicating its degrading, is depressing and requires new thoughts for renovation to ensure future sustainability – EvE.

Chapter Four

 (1) We wish to acknowledge the Hon. Dr Michael Bassett QSO former minister of local government, Auckland City Council councillor and historian for kindly reviewing drafts of this book chapter.

Chapter Five

 (1) This system is a federal platform reporting the data from municipalities and states finance in Brazil.

(2) Just to have an idea, in December 2010 the exchange rate was US$1,00 equivalent to approximately R$1.70.

Chapter Six

 (1) Since 1980, see the Official Festival Homepages: Rossini in Wildbad Belcanto Opera Festival, http://www.rossini-in-wildbad.com/rossini/ and Rossini Opera Festival, http://www.rossinioperafestival.it/?IDC=15.

Chapter Seven

(1) About conceptual relations between space, place and landscape in human geographic tradition, see Tuan 1977/2011; Marcus 2006; in architecture Norberg-Schultz 1971 and Sanabria 2011.

(2) Sata vuotta vanhas talos kun asuu, niin siinä on jotaki hohtoa. Vähän kylmä voi olla talavella ja muuta. – – Haudattiin tässä keväällä – – viimmenen, joka on meillä syntyny.

(3) Omallakin kotitalolla on pitkä tarina ja pitkät perinteet, ja ne hirret, mitkä on talossa tälläkin hetkellä, on nähny monta, monta sukupolvee. Että se on sellanen ominaispiirre, mitä ei kauheen monella ihmisellä sitten, tai että ei oo monella semmoisesta enää kokemuksia, varsinkin nuorilla.

(4) No mun kotiseutu on kulkenut sukupolvelta sukupolvelle Keski-Kuljun suvulla viis sukupolvea ja mä tunnen sen paikan itse ja mä tunnen, että siellä on lähellä myös se kaikki muutkin: kalusteet, jotka on periytyny monta sukupolvea ja se maisema, joka ei oo muuttunut paljoakaan aikojen saatossa.

(5) Harvoon maanviljelijät on päässeet asumaan mihinään muualle. – – Määkin oon ollu koko elämän täällä. – – Nii ettei oo vertailukohtaa. Edelliset sukupolvet toimitti sitä, että sotahommis on vaan tullut oltua, mut me ei nyt olla oltu muuta kun armeijassa … Joo ja yks talavi Alajärvellä koulussa ja sekin puoliksi kotuapäin ja – – nyt lukionkin käy kotua päin.

(6) Oon kaks omakotilookin rakennuttanut tuonne Seinäjoelle ja tuota... Mä oon niitä aina kuitenkin pitänyt enempi asuntoina kuin kotina. Että mulla on koti aina ollu tuossa tänne suuntaan kilometri.

(7) Hiihdän Tuusulanjärvellä hirveen aktiivisesti. Me ollaan koko aika siellä järvellä miehen kanssa, että täällä ihan sama hulluus jatkuu. – – Siellä minä pyöräilen myöskin Tuusulanjärveä ympäri, niin kuin minä teen täällä. Järvi on vaan pikkuisen pienempi, kaksikymmentä kilometriä ympärystää. – – Nyt mä vasta tajusin, että tässähän on muuten yhteys jollakin lailla.

(8) Jännä, että mä oon ollut aina vesistön ääressä. Seinäjoella toki en ollut vesistön ääressä, mutta koko ajan kaipasin. Et selkeesti osa Kuortanetta on toi järvi tuossa, tai ainakin osa mun kotiseutua.

(9) Täältä on yks avioliiton kautte meni Ylipäähän päin. Oli ikävä sitten vettä kun oli nähäny, tuos mäellä asuu niin sen piti laitaa korvoon täyteen vettä ja kattua siihen niin sitte se ikävä taas vähän aikaan hellitti. Se oli niin tärkiä.

(10) Koska mullehan se kotiseutu on tämä Kuortane. Mä oon syntyny täälä. Yheksäntoista vuotta asunu täälä. Niin se on ollu aina mun mukana ja mä oon kulkenu hirveen paljon täälä aina. Kakskytyhdeksän vuotta pääkaupunkiseudulla, puolitoista vuotta Kanadassa, aina se on ollu se Kuortane. Et mä oikein hankin tollasen tatskan tähän käsivarteen: Kuortaneen vaakunan, että tietää, mistä mä oon.

(11) Mä en tiedä mikä siinä on, mutta kun on toises paikas kauemman, niin kun vaikka siellä kotipaikkakunnalla, niin sitten rupiaa kaipaamahan tänne. Mutta sitten, jos täällä on ollu kauemman, niin haluaa sinne kotia. Et joku siinä on ero, että haluaa enemmän aina toiseen.

(12) Niin, mä oon varsinainen monipaikkainen, kun mä oon Mikkelistä kotoisin ja oon töissä Jyväskylässä ja mies on Vaasas ja sit me ollaan viikonloput, no talvella

joka toinen nyt ollaan oltu, mutta suurin piirtein kaikki vapaa-aika täällä ja välillä Mikkelissä käydään. – – Mut tää on ollut hyvin mielenkiintoinen tutustuminen noin viimeisen kahdentoista vuoden ajan. – – Siis itäsuomalaisena mä odotan, että milloin se maaseutu alkaa, milloin ne metät ja sieltä talot. Mut nyt mä oon jo tottunut tähän maisemaan.

(13) Kyllä kotiseutu aika pitkältä mun kohdalla lähtee siitä liikkeelle, että minkälainen se on luonnoltaan, kuinka se asemoituu siihen, nyt kun täällä Etelä-Pohjanmaalla ollaan niin kuinka Kuortane asemoituu Etelä-Pohjanmaahan. Niin kuin alussa jo niissä kuvissakin jo näkyi niin se kierros oli pitkälti sen Kuortaneenjärven rannalla mutta kun tännepäin tullaan niin se Suomenselkä alkaa lähestymään ja ollaan justiin siinä vaihtettuma-alueessa kun Suomenselkä muuttuu aakeeksi laakeeksi. – – Ja se luonteenpiirre on hyvin eteläpohjalainen ja siinä on ehkä sekoittumaa jo tuolta muista heimopiireistä, kun kieliraja menee tässä varsinkin näitten kylien hyvinkin tuossa lähellä kun Lehtimäelle päin mennään.

(14) – – kun tästä menee Alavudelle ja siitä Sulkavankylän ohi Virroille niin maisema on erilainen ja murre on erilainen.

(15) Töysäläiset naapurit, jotka on yhtä lähellä kuin kuortanelaiset naapurit niin aivan eri murre isäntäväellä. Ja minä joka tulin muualta niin minä huomasin sen ihan selkeesti sen murrerajan. – – No minä asun ihan Töysän rajalla.

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INDEX