



UNIVERSITY OF CRAIOVA  
FACULTY OF SOCIAL SCIENCES  
POLITICAL SCIENCES SPECIALIZATION &  
CENTER OF POST-COMMUNIST POLITICAL STUDIES  
(CESPO-CEPOS)

REVISTA DE ȘTIINȚE POLITICE.  
REVUE DES SCIENCES POLITIQUES

No. 58 • 2018





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FACULTY OF SOCIAL SCIENCES  
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**Revista de Științe Politice.**

**Revue des Sciences Politiques**

**No. 58 • 2018**



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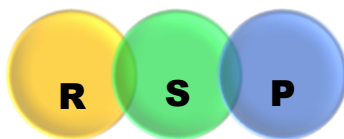
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## EDITORS' NOTE

### Governance-Society-Culture: Post-Communist Policy Analysis

#### Note of the Editors of the *Revista de Științe Politice. Revue des Sciences Politiques*

Anca Parmena Olimid\*,  
Cătălina Maria Georgescu\*\*,  
Cosmin Lucian Gherghe\*\*\*

#### Editorial tasks

The second issue (**RSP 58/2018**) of the *Revista de Științe Politice. Revue des Sciences Politiques* (hereinafter **RSP**) contains researches based on the linkage governance-society-culture before and after 1989.

**RSP 58/2018** analyzes, monitors and answers to the recent challenges in the field of the Eastern and Western challenges before 1989 and, also, Eastern and Western priorities after 1989.

The contents of the current issues mobilize and research:

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## EDITORS' NOTE

- (i) the legal resource in the field of policy and security;
- (ii) the social understandings of post-communist changes and challenges;
- (iii) the policy and security developments in East and West;
- (iv) the historical evolution of the recent conflicts;
- (v) the social and cultural settings in the post-communist landscape;
- (vi) the meanings of “ethnocultural” developments in post-communist countries
- (vii) the management of “free time education”.

Thus, **RSP issue 58/ 2018 (June 2018)** integrates a governance-society-culture vision and understanding in the East and West experiences for more than thirty years associating an inter- and multi-disciplinary analysis of the main societal priorities in this period.

The nexus between the three concepts is monitored considering also the European Union experience at micro and macro levels of action and implementation.

The articles of **RSP issue 58/ 2018 (June 2018)** enable both policy and practice contributions considering the changing social, cultural, political and historical determinants transforming the national, European and international landscape as follows:

- (I) Anca PĂUNESCU, Mihaela CHIRIȚESCU, *Political News – Language and Discourse* (the article emphasizes the impact of the political news and of the “language discourse”);
- (II) Loretta C. SĂLĂJAN, *Ontological Security and the European Union Global Strategy* (the article focuses on the particular landscape of the European Union security encounters and the fundamental understandings of the “ontological security”).  
The analysis of the European Union Global Strategy enables the following thematic areas: European identity, “the problematic Eastern vicinity” and its “security niche”;
- (III) Bejtush GASHI, Gurakuç KUÇI, *“Spider Diplomacy” as a Complementary Explanation of the New International Circumstances* (the article focuses on the development of the theory that the authors call “the spider diplomacy”). The concept offers a theoretical alternative explanation of the new international system matrixing the meanings and uses of the following topics: realism; neutral theories; Western Balkans; “a hybrid theory”; new international paradigms;
- (IV) Anca Parmena OLIMID, Daniel Alin OLIMID, *Analysis Framework of the European Commission: Monitoring Population, Human Capital and Inclusion in the Social Agendas n<sup>o</sup> 38 - n<sup>o</sup> 47 (October 2014 - April 2017)* (the article generates a social and legal analysis of the European Commission official documentation). The article explores the following key concepts and trends: population, human capital, social inclusion, social innovation, social affairs, development etc.;
- (V) Florin NACU, *Great Romania under the Menace of the European Extremism and Revisionism* (the research considers the social and historical developments of the year 1918 with impact on the evolution of the internal and external politics);
- (VI) Alexandra PORUMBESCU, *The globalization debate. From “The great Voyages of discovery” to post communism* (the article presents the “globalization phenomenon” and the consequences of the “global governance”);

## EDITORS' NOTE

- (VII) César GARCÍA ANDRÉS, *Historical Evolution of Ukraine and its Post-Communist Challenges* (the article focuses on the following steps of the research: conceptual framework, political and historical overviews of the problem, the “national identity” encounters and its patterns in the post-communist period);
- (VIII) Pablo Arconada LEDESMA, *Post-Communism and Desintegration: Somalia in the New World Order* (the article emphasizes the Post Cold war historical development and the main causes and effects of the Somalia’s crisis focusing on the internal and external causes and effects, the international aid conditionalities, the factors of identity and diversity, the postcolonial dysfunctionality and the political cleavages);
- (IX) Maria PESCARU, *The Crisis of Culture in the Post-Communism Transition* (the research individualizes the settings of the “crisis of culture” and the challenges of the post-communist period: Romanian society reform, the challenges of the social, political and cultural system, the national understandings of the “cultural reconstruction” and the “national identity” patterns);
- (X) Ecaterina Sarah FRĂSINEANU, *Management of Learning Time and Free Time Education for Students* (the article reviews the management of the “learning time”, “the time education for students”, the nature of resources, the system responses, the learning context and the relationship between learning and performing);
- (XI) Danijela VUKOVIĆ-ČALASAN, *Managing Ethnocultural Pluralism in Montenegro: Do We Need Interculturalism?* (the article frames the “ethnocultural pluralism” and the “multiethnic” settings of the mechanisms, actions and plans in Montenegro);
- (XII) Andrzej DUBICKI, *What do we accept, what we neglect? The quest for the proper version of collective memory. Some considerations about the names present in urban space after the 2015 elections in Poland. The case of Łódź and its neighbourhood* (the study focuses on the following topics: “collective memory”; “urban space”; “2015 elections” and Poland).

### Research methodology

The articles of issue 58 provide four main research methods focusing on the relationship between governance-society-culture. The thematic areas of the **RSP issue 58/2018 (June 2018)** are analysed and investigated using the following research methods:

- (i) The comparative social and historical research (the articles focusing on the European identity encounters; cultural identity; education process, collective memory, intercultural dynamics and patterns);
- (ii) The network analysis (the articles presenting the international actors and relationships, the globalization theories, facts and data, the diplomacy encounters)
- (iii) The policy framework analysis (the articles empowering the European Union institutional and structural architecture, the political news analysis, the political concepts, the political terminology and discourse);

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- (iv) The historical and political research and analysis (the articles focusing on the exploration of the post-communist challenges, the new world order, the electoral moments and processes).

The contents of the **RSP issue 58/ 2018 (June 2018)** enrich the policy analysis of the relationship between the governance-society-culture. This particular analysis of the institutional, social and cultural argument, the thematic area of the current issue develops a new research agenda focused on the Eastern and Western mutual recognition and understanding of the specific developments and patterns in the field.

Wishing you all the best,

*The RSP Editors*



## ORIGINAL PAPER

# Political News – Language and Discourse

Anca Păunescu\*  
Ileana Mihaela Chirițescu\*\*

### Abstract :

This article approaches political news and their analysis, according to the structure of the written press. Political news shall be analyzed as language phenomena and as discursive structures. The persuasion strategy of the issuer and the way he sees things underpin the political language. The social context of the problem, the language used, the journalistic language of the news, the status of the issuer, are always at the border between pragmatics and semantics, between linguistics and political sciences, between sociology and marketing policy. This article aims to address only a few elements of the also complex relationship between ideology and press, between the language used and the sphere of politics, without doubt remaining open for the many forms and visions that are to come.

**Keywords:** *political news; political analysis; political language; scientific terminology; idiom*

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### **Introduction**

The difference between language and discourse is described by many researchers in specialized works. Speech requires spoken and written language. Some linguists describe the discourse as the context of the emergence of certain statements (political discourse, internet discourse, religious discourse, legal discourse, etc.). Instead, language represents a system of communication, the system of words, signs and sounds. Political discourse lies at the heart of political news and has its own characteristics. Within political news, it is well-known that we encounter words never seen or heard before because a speaker or a creative writer has just invented them. The new records are constantly added to dictionaries, as speakers have to reference new concepts, objects and ideas.

### **Political language / discourse - characteristics**

Ferdinand de Saussure was the first to make the difference between language and speech. The starting point of Saussure's reflections is the unique, absolute, expressive act of speech, the endless series of different sound products and the series of different meanings.

Due to language, the audience reduces a particular phonic performance to one or another of the phonic production classes and a particular significance to one or another of the significance classes. Saussure makes the distinction between *langue* (as the possibility to use a language), *parole* (as a set of signs used by a community such as Romanian, French, English etc.) and speech (as a speaker in a given language). The language has a synchronous dimension (as relationships between signs at a given time) and a diachronic dimension (as the evolution of signs over time).

In its turn, the idiom encompasses the terms that define the different kinds of languages, the regional varieties of a language, as well as its social varieties.

According to the French linguist Philippe Blanchet: "An idiom is a minimal network of individual linguistic systems that are identified by an autoglottonym and a specific linguistic consciousness" (Blanchet, 1991: 85).

The invention of new words and concepts of language is a necessary part of maintaining the current social dynamics. For example, in the case of news, social scientific terminology is faulty and misused, such inconsistencies may be the reason for misunderstanding. As in any other field, in politics too, the creation and use of typologies - sets of coordinated terms that provide labels for different components of the analytical domain of interests - is often at the center of social scientific analysis.

When referring to political analyzes, we can think of either political theory or thinking, in short, of political science as academic discipline or newspaper articles, political events, speeches, etc.

The dialect - the territorial branch of a language - has a political character as well. Political-type dialects vary depending on several criteria: affiliation to a particular party, the type of speech of a particular speaker, his preparation which may be philological, political, journalistic. Equally, it is true that political discourse can be spotted by anyone who can fit smoothly into the category it belongs to.

Political terminology is not a hundred percent specific, that is, it can be found in other types of discourse, too. Political terms are limited, the field itself is not one that would not allow the understanding of political discourse by people with other types of professional training.

James Rayburn tells us at the beginning of his novel, "The Absolute Truth", that according to George Orwell "Political language is designed to make lies sound truthful



## Political News – Language and Discourse

and murder respectable, and to give an appearance of solidity to pure wind”. To Orwell, language decline must ultimately have political and economic causes, because “if thought corrupts language, language can also corrupt thought”. Thus, political language must be mainly formed by euphemisms, questions begging and a disturbing wave of dim. Orwell says that “four years have passed since the Dayton Accords brought a complicated, bitter peace to Bosnia. Almost a year has passed since NATO air strikes drove Serbia forces out of the Yugoslav province of Kosovo, making possible another complicated, bitter peace. Soldiers from United States, Great Britain, Russia, and many other countries (...) are now stationed as peacekeepers in the Balkans. Besides a considerable reduction in violence – no small achievement – what has the world’s intervention wrought?” (*Yugoslavia and the World*, The Atlantic Monthly, April 2000: 79).

Orwell speaks about the fact that this type of description and phrase is a “defense of the infinite”. The presence of the Balkan soldiers, these “peacekeepers”, the fall of bombs on Yugoslavia, the whole description is too brutal for most people to experience this kind of feelings and not to imply that it matches the alleged purposes of political parties. So, the unprotected villages are bombed from the air, the inhabitants were chased away in the countryside: this is called pacification.

Faced with such a writing, the reader seems rather to read a novel, not to read a story about living human beings embedded in a desolated reality.

The system of meanings common to those who share a certain ideology derives from the distribution and allocation of power through the force of discourse or the eloquence of the political act of communication. Ideologies usually arise due to imbalances or strong stagnation in society, aiming at reaching or regaining trajectory toward progress. There is a strong support for the emergence of diversified sources of communication that promise solutions for getting out of the deadlock and for an ideal remodeling of society.

Any ideology is almost oximoronic by its mere operation, it always promises freedom, independence, but for these things it requires regimentation, obedience and an inevitable loss of identity. In order to have a strong impact, an ideology must bring to the attention of individuals new, original ideas with a deep reforming character and a potential for robust change. This new character is a source of vulnerability in assuming ideological choices in the population.

Analyzing the connection between ideology and language, Edward Sapir identifies significant variations in the potential for internalization and externalization in terms of reflexivity and enhanced development of mental mechanisms and implicitly of ideological values. The Exeget also explores a generative dilemma concerning the interchangeability of cyclical dualism - ideology, namely the idea that language is the source of ideas, and ideas give birth to language: Only the external form of the language is constant, its internal significance, its value and its mental intensity varies according to the type of attention or the content of the reflection, chosen by the mind, it is understood that it also varies according to the general development of the mind.

Undoubtedly, political struggle is a confrontation of resources, and the true goal of resources is the acquisition of communication and communicators. Language as a decisive weapon has become relevant in the process of asserting and consolidating political power. Its universal character implies a certain level of versatility, but an effective communication act will, without exception, rely on contextualizing it, adapting the message in order to resonate with listeners, but also on shaping communication in order

to best harness the strength of the candidate's transmission, thus increasing the chances of credibility and naturalness in expression.

Language correlates interaction transactions between systems that are not interconnected. It is an art, but also a pragmatic science at the same time, thus acquiring the status of strategic art of asserting the power of manipulation and control. Language thus gets a dimension of the truth that pulses in the heart of a community. The linguistic exegesis centers on the understanding of lexical options, but the socio-political dimension also treats the dimensions of manipulation or even the assumption of a negative ideology, not by ignorance, but by the sphere of intervention of the gregarious emotional framework.

Language, as a finality, proposes a true communication of social reality. Political communication assumes the need to express social reality and focuses as an objective adaptive and resonant expression of truth. Unfortunately, truth is not a universal constant, it does not possess even some objective stability, it means its own version of the ideological viability of each individual or group. That is why an effective political communication act will, on the basis of a sociological study, agglutinate the compatibility of all the truths of the participants in the political game, trying to reach a formula for identifying the justice and the legitimacy of their cause. Nae Ionescu speaks of truth systems, generative pulses of truth based on their own experiences and perceptions, and re-evaluations of truth that can coexist even at the level of one person: [...] there are as many systems as there are people. Why does everybody say that only he discovered the truth? Because every man believes that the truth can only be for him. And what's coming out of here? This is the knot of the matter. Because in philosophy every philosopher judges only with his experience, and the philosophical experience is unique to every man. [...]. When a philosopher has reached a formula, he remains committed to it forever. If today I'm raising Kant from the dead, surely they would say the same thing. He would say, 'I was still right' too, and he could defend his system against anyone attacking him. (Ionescu, 1993:34)

Rodica Zafiu says that the existence of the political discourse cannot be questionable, but the idea of political language is quite controversial. Zafiu adds that is "hard to be defined through a list of purely linguistic features (lexical and morphosyntactic), political language is nevertheless easily identifiable by reference to the field of use and to the communication context, which determines the association of a specific vocabulary with a series of discursive strategies. Its essential features are persuasive stake and ideological content; from these derive, as secondary features, the appeal to euphemistic strategies and the tendency to cliché" (Zafiu, 2007: 28).

Also, Rodica Zafiu confesses that from the point of view of functional stylistics, political language does not have a clearly marked individuality, it is to a large extent identified with standard language, resembles the journalistic language that influences it, uses specific terms but does not have a rigorous terminology, interferes with legal and administrative language. Although it is difficult to define it using a list of purely linguistic features (lexical and morphosyntactic), political language is easily identified by reference to the communication situation and to the field of use. The persuasive stake and ideological content or tendency to cliché are its fundamental characteristics. The communication situation involves an individualized speaker who speaks on behalf of a group, not in his own name, addressing a wider audience. The conative function is undoubtedly the most important function of political language because it seeks to change opinions, attitudes, and even the actions of those to whom it addresses. The massive use of euphemism is undoubtedly the most important feature of political language;

## Political News – Language and Discourse

„euphemism consists in the conscientious replacement of linguistic expression with negative meaning or connotation by another, neutral or positive, in order to avoid a negative effect” (Zafiu, 2007: 35).

Politics and society become elements trapped in a ballad of carefully regulated communication, the linguistic rituals associated with this collaboration act being implicitly a recrudescence towards the assumed strategies of symbolic enunciation and understanding.

Patterns of non-verbal behaviour are also a potentially decisive form of political emissary, a tacit understanding between actors based on tradition, individualization and repetition.

No matter how much the methodology of applying and disseminating the political message evolves, any innovation can be operated strictly on the basis of its correlation to the collective mentality. In other words, any novelty in political communication must find its correspondent in robust paradigms implemented at the level of the individuals and institutions they seek to address. Moreover „in order to establish itself as a public domain, any political action must primarily express collective and / or institutional interests. From this point of view, political action is by definition representative. Thus, politicians have ideological representativeness (they are representatives of parties or politics) or elective (they represent the electorate who chose them). [...] Secondly, the political action implies the existence of a program of actions presented as a necessity for the public interest. Thirdly, the public policy dimension involves a series of symbolic conditions such as: the past and the reputation of the political man, the collective memory of the electorate, and conventional thinking at a given moment (representations, opinions, and collective attitudes)” (Beciu, 2002:9)

In addition to the rigors imposed, political language also relates to the personal style of each politician, a style that can be concise or prolix, rational or emotional, precise or vague, simple or pretentious, archaic or modern, tense or monotonous. Political language is used in public speeches or in parliamentary debates, in electoral campaigns, but also in advertisements of politicians appearing in the media.

Political news is also based on the political language, used in this case both by the reporter or the moderator and by the guest.

The same author identifies a triple structural axis to support the relevance framework in the effective implementation of the political message. She thinks that it is not just what we say, but who, where and when we address. The technique of constructing language must therefore include not only semantic or linguistic parameters but also spatial, temporal, or personal and collective considerations. Consequently:

- a. Political communication is manifested in arenas, that is to say, in certain social spaces where the relations between the participants depend on TV formulas or strategies, as well as on media, in a word of symbolic rules.
- b. Political communication takes place in socio-administrative and geographical territories.
- c. Political communication forms a field of intentions in which social, communicative, dramaturgical, teleological, axiological, affective and practical actions intersect (Beciu, 2002:21)

Mass-media as the supreme element of political communication surpasses its condition as a simple facilitator of political information. The press is, by no means, perfect, and often its objectivity is put into question. We cannot say we have an independent press, but we can affirm with certainty that in a democratic society the press

is free. The media's struggle to uncover important truths transforms the press into a guardian of democratic order. In this respect, it is relevant to understand the approach of Gwynn Williams concerning the importance of political communication in the propagation and consolidation of the health of a democracy through mass-media which also becomes an element that guarantees the freedom and: [...]the order in which a certain way of living and thinking dominates, where a single conception of reality propagates all over society, in all its institutional and private manifestations, influencing its spirit, tastes, morality, customs, religious relations and political and social relations, especially in terms of their intellectual and moral connotations (Williams, 1973:162)

According to Doru Pop, the functionality of the communication act must be based mainly on the persuasive capacity of the candidate in accordance with the information transmission methodology and then there is a concern with the level of understanding about group identity or individual identity of the receptor. In other words, we need a powerful transmitter, an efficient transmission method to reach as many reception sources as possible and a group that if not already convinced of the truthfulness of the message will eventually be captured and empowered by force, insistence, and exclusivity:

The press can alter the electoral beliefs of citizens, can confirm and reinforce existing choices, can induce new ideas in a one-way direction. Moreover, opinion leaders stimulate group loyalty, the social identity of ideological communities and the desire to maintain decisions taken under the pressure of group membership (Pop, 2001: 87-88).

#### **Political news – characteristics**

Both political discourse and political news have certainly a structure, a function, a situation, an intention. The structure of a political news is: the description of the situation or of the intention to communicate, the message it wants to convey, of the ideological and social framework in which it falls. What does it intend to reveal and which target audience it addresses to? In general, the tone used by moderators of political broadcasts is a serious one, even aggressive at times. The intent of a political debate is to change the target audience's vision of a political character in vogue, a political party in power, or an important subject for the citizens of a community / country.

Whatever the option adopted to strengthen the language persuasion function, regardless of the intended perspective (transmitter-transmitter-receiver environment), language must involve a component not necessarily coercive, but rather overwhelming to change or reinforce convictions. In *The Encyclopedia of Language and Linguistics*, the power of political language can be understood through: the definition of the speech, the explanation of language-in-action and refers to three possible approaches: the speech as a text in the approach of formal linguistics; speech as a conversation in the sociological-empirical approach; the discourse as power / knowledge, in the critical approach. Also, as a corollary of the relationship between language and power, we recall the distinction between power in discourse and power behind discourse - if the first draws attention to discourse as a place where domination appears and relationships of power are staged, the second identifies the discourse itself as a target of domination and hegemony. (*The Encyclopedia of Language and Linguistics*, 1994: 940).

Political news can be presented in several ways: political talk show, general news about politics, press conference, newspaper article with political subject.

If we are talking about the newspaper article, such a prose has a certain pattern. Starting from the title that definitely needs to have a good grip; and the key disclosure is not necessarily the one that the title insists on.

## Political News – Language and Discourse

The magazine “Valeurs Actuelle” titled on August 11, 2016: “The Last Confessions Before the Battle” referring to Nicolas Sarkozy and the announcement of his candidacy from the Republicans. In fact, the confidentiality was not that Sarkozy had announced his candidacy, but that he spoke of his confidence in his future political chances with or without this candidacy. Sarkozy pointed out that “what matters is not so much the announcement of the candidacy, but also what lies behind it, the way and the content,” adding: “Those who say I’m dead are based on surveys, that is in the virtual environment. And I prefer living in the real life”.

The phrases used in political press articles are usually not long, but on the contrary, they are short, striking and resonant, like “those who say I’m dead”, “I prefer living in the real life”.

The political talk-show is the basis of profile television. The responsibility of the political talk show moderator is special and deserves all the risks he assumes because the laurel pickers are impressive. The opinion of the talk-show moderators is very important even for political leaders because they can change their fate and the fate of the parties they belong to. People have a special respect for this type of moderators because they are undeniably opinion-makers in a society. The duties of talk show hosts are multiple. They must always be up to date with the latest news even in the hotter minute they are announced by the designated political leaders. Also, the opinions they express on this news should be based on a great documentation, and the guests they have should be best suited to talking about the subject.

Political communication is at first instance a set of procedures. A politician may propose a specific legislative initiative, but in order for it to become law, a series of collaboration mechanisms, including communication with the public, must be activated. Poor communication may induce interference with a set of opposition factors such as negative public opinion, protests, declines in polls or even criticism from internal and external partners. Political communication is based on the symbolic power of the message, on the creation of a language that people not only accept but embrace, the recipients of the message must be motivated and able to transform the abstract theoretical dimension of language into concrete achievements, changes in life daily. Politicians such as John F. Kennedy, Margaret Thatcher, or Bill Clinton did not send a simple message, they used messages that inspired people, generously offered charisma through every word, look or handshake. They understood that the primordial function of communication meant in Ball's expression "the practice of using language to motivate people to believe and to hope for ideas that they would not normally think or implement" (Ball, 2011: 42).

The capacity to persuade voters about the viability of their own political message will include, besides classical communications, specialized methodologies based on informational control, the release of half-truths or even the allocation of financial resources to support some, even obsessively, such as the so-called superpacks in America, which are nothing but media and financial conglomerates that support either the Republican Party or the interests of the Democratic Party. The emergence of these mammoths on the communications front, or other similar entities, has led many voters to lose confidence in the freedom and independence of the democratic process, thus having an opposite effect to the investment interests concerned with the spread of political ideologies.

The tone used by the moderator of a political talk show is usually incisive, very serious, the language is rigorous, with concise and at the object phrases, with repeated key-words, sometimes even excessively, so that the audience has the attention to what

they want. Under no circumstances, moderators of political talk shows are simply theoreticians. They plead for a cause with all the journalistic forces they have.

The moderator's communication behavior can go in several directions. Talk-show can lead the image of the politician in question or of the political party in derision: Karl Zero: "I have prepared the questions, and suddenly I said to myself: «That question is too idiot, but that is, is a question to be addressed: is it mandatory to be old in order to be a candidate?»"

Obviously, the media builds and rebuilds reality for the public and is one of the most important powers in the state.

G.K. Chesterton believes that, to a large extent, journalism consists in telling some people that "Lord Jones is dead," but they never knew he was alive.

In recent years an increasingly popular phenomenon of journalism has developed: the press conference. Presenting the press conferences "live" on television, politicians picked up one of the most powerful forces in exchange for public opinion between the people and their government. The press conference has become an important source of news and a way to change the attitude of the public towards a certain ideology or the evolution of the public image of a particular politician. All of these facts are part of public communication and, inevitably, of some manipulation strategies.

The press conference requires logistics and means to be carried out in good conditions; "the press conferences do not serve the vanity of the leaders of the public institution, but the press. These give journalists the opportunity to question the members of the management of an institution about major issues of its activity and to communicate to the press a unitary message. When journalists approach leadership one by one, the uniformity of the message is impossible to sustain. For both parties, the administration of time resources is also very important, and a press conference is more advantageous, because if we assume that twenty journalists call each other to investigate the same theme, the latter they will have less time to check the statements made and write the article itself, and the communicator would waste a long time saying the same thing" (Epure: 2004).

The analysis of President Barack Obama's speech in November 2008 will include, in addition to exploring the linguistic resources activated by the first African-American President in the history of the United States of America, and the study of the sociopolitical context that led to the generation of that address. Recognized for his overwhelming charisma, Barack Obama was more than a surface communicator, he knew to captivate and unite a complex and different multiplicity of voters behind ideals communicated eloquently and clearly by virtue of assuming a mission of unification, healing of the nation.

The speech as a whole is the communication confirmation that doubles the political truth that the American dream can be achieved by every citizen of America, regardless of age, race, religion or sex. The applied analysis will explore the interaction between the deliberate use of communication functions in harmony with the political aspirations of the speaker as the bearer of the listener's hope and ideologies.

The President Obama give a good example when he says "if there is anyone out there who still doubts that America is a place where all things are possible, who still wonders if the dream of our founders is alive in our time, who still questions the power of our democracy, tonight is your answer. It's the answer told by lines that stretched around schools and churches in numbers this nation has never seen, by people who waited three hours and four hours, many for the first time in their lives, because they believed that this time must be different, that their voices could be that difference" (Obama, 2008).



## Political News – Language and Discourse

The President begins addressing in a very powerful and direct way using the emotional function of language through rhetorical instruments, at a primary level, to declare victory in front of his supporters, and at a secondary level to make a pseudo-arrogance act of silencing its opponents. The communication technique is carefully selected, using an interrogatory rhetoric in determining the veracity of a victory that is not a mere political victory, but the living proof that the American dream is not an ideological utopia, but a concrete reality that has taken shape even under the eyes of the listeners.

The difference between the political talk show and the press conference is that almost always the political talk show is hotly organized just a few hours after a hot event. Guests are announced shortly, the moderator organizes the show in a very short time. The press conference is organized long before, the subject is established, are invited journalists who are interested in the topic approached and have a training in the subject. For the press conference, there are written invitations, the invited guests are invited by phone, given the short time that the moderator has at his disposal to approach them.

In a sense, we are all aware of the political world in which we live, how newspapers, magazines and TV programs that compete with each other in describing a reality they sometimes did not confront or did not witness look like.

### Conclusions

In general, both political discourse and political news are closely related to power and handling relationships. Political news in whatever form it manifests is the interpretation of political discourse, and the biggest trap in which it can fall is the lack of objectivity. Lack of objectivity occurs especially because of the rejection of objectivity which, in turn, arises from the favoring of a political group or a representative of a party. The Sapir-Whorf hypothesis according to which language shapes perceptions and thinking is a topical one, as reflected by the analyzes and examples above. It is indisputable that political discourse, as well as its interpretation through political news, can change the thinking and perception of people.

Objective or not, incisive in language or not, moderators of political talk-shows, journalists who write politics headlines, political press conference organizers, politics specialized reporters - all of whom are opinion-makers, road makers for the various political formations, manipulators by willingly reformulated language, in the seemingly severe criticism of the political parties, essentially indisputable partisans of an idea from which thousands of other interpretations emerge.

The role of political communication in the dominance of a society will be accomplished by exploring the linguistic ideology of the discourse generator that will proliferate a multiplicity of manipulation strategies tailored to the context of addressing as well as its own dissemination resources and distribution networks. Political communication exists on a quadruple function axis consisting of: the speech generator, the message made, the dissemination methods and resources, as well as the electoral public that will receive the communication, but will also evaluate the person who delivers that discourse.

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## ORIGINAL PAPER

# Ontological Security and the European Union Global Strategy

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### Abstract:

This paper analyzes the relationship between identity and security policies by critically engaging with the European Union Global Strategy (2016). It employs a conceptual perspective derived from ontological security, whereby identity is a socio-psychological construct that requires consistency over time and external recognition. The methodology of discourse analysis has been used to show how the meanings about the European Union's identity as security provider have been (re)articulated, which indicates the ongoing search for ontological security. The Global Strategy has proposed a more grounded vision for the European Union's international role, among which the move from democracy promotion to the fostering of resilience. The redefinitions were a necessary step to address the unstable foundations of the European Union's identity narratives, considering the failed expectations of the European Security Strategy (2003) in general and the problematic eastern vicinity in particular. However, the discursive shifts within the Global Strategy are only a temporary solution and cannot reinforce the Union's ontological security in the long run. They have not surpassed the fundamental challenges faced by the European Union in its quest to become a credible security provider, affirmed by other international security actors and the empirical reality.

**Keywords:** *identity; ontological security; European Union; foreign policy*

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The European Union (EU) as a collective actor has put effort into carving out its foreign policy and security niche in the international system, but the journey is ongoing. Such a task features considerable difficulties, because the EU is inevitably and sometimes unjustly compared to international security players like the North Atlantic Treaty Organization (NATO) or the United States (US). Both the European Security Strategy - ESS (2003) and the EU Global Strategy – EUGS (2016) have constituted “important sites for narrating the EU into existence as a security actor” (Mälksoo, 2016: 374). Comparisons between the strategies are used to emphasize the shifts in discourse, but the focus is on the EUGS - a key text that has updated the concepts and approaches circulated by the ESS, while promoting a grounded vision for the EU’s regional and international role.

Despite a rather “grandiose title” (Dijkstra, 2016: 370), the EUGS has revised the EU’s priorities along two specific coordinates: internal security and the resilience of its surrounding regions. The apparent contrast prompted this article to examine the EUGS from an ontological security view, tracing how the EU’s identity as security provider has been (re)articulated. The identity narratives have undergone several redefinitions, mostly to incorporate the great changes in the international security context since 2003. Overall, the EU has constructed a balanced security provider identity, which seeks to distinguish itself from conventional security agents – primarily the US. A wise choice that brings more credibility to the identity narratives, taking into account the undeniable fact that the EU lacks the common military resources necessary for a security provider relying on hard power.

With regards to structure, the arguments of the article have been organized in three sections – conceptual perspective and methodology, the discussion of the EUGS and concluding remarks. The conceptual part introduces the framework based on ontological security, which draws insights from three socio-psychological premises about identity and discourse. The methodological tool adopted here is a form of discourse analysis, as defined by the process of “articulation” (Weldes, 1999). The conceptual perspective and methodology lay the groundwork for a discursive study of the EUGS and an empirical look at the EU’s security policies in the eastern neighbourhood.

### **Conceptual Perspective and Methodology**

Traditional security studies have often been preoccupied with the physical security of states in the international arena. While physical security is a constant concern, ontological security takes a broader approach and analyzes “the seeking of a consistent self through time and space and the desire to have that self recognized and affirmed by others” (Innes, Steele, 2014: 15). A state maintains its “self-concepts” through identity narratives that are translated into “routinized foreign policy actions”; when “this sense of self-identity” has been disrupted, the state aims “to re-establish routines that can, once again, consistently maintain self-identity” (Steele, 2008: 3). These are necessary steps considering that “not only physical, but also social survival is at stake” in international relations (Ringmar, 2002: 116). Social survival involves articulating stable identity narratives, which at the very least are not contested by others. For instance, though the EU has persistently sought to shape an identity niche for itself as security provider in international affairs, this identity needs to be affirmed by other prominent security actors and by the empirical reality. Otherwise, the articulations remain an internally driven aspiration that lacks external credibility.

The ontological security perspective adopted here draws from three socio-psychological insights related to identity and discourse. The first premise is that states and

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international organizations are comparable to individuals, hence being treated as subjects. The anthropomorphization becomes natural since both states and international organizations “are governed by people in the form of their individual leaders” (Greenhill, 2008: 346). But parallels between states/ international organizations and individuals can be problematic, because the former two have “no unified consciousness, no single memory, and no subjective will” (Ringmar, 2011: 4). The debate has been settled in a convincing manner by arguing that the subjectivity of states is formalized in international law, where a state represents “a subject endowed with rights and obligations, and it is an actor who can think rationally and be held responsible for the consequences of its actions” (Ringmar, 2011: 5). The same argument can be extended to the EU, which is an organization of states based on formal and legally binding treaties.

The second premise conceptualizes “identity” as the product of socio-cognitive processes of self-identification and categorization, with relevance to explaining intergroup behaviour (Tajfel, 1981). Identity stems from being member of a specific social group, which creates narrative boundaries between the self and others. It strives to “convey who we are or are perceived to be” and the ways in which we “locate ourselves and others in the social world” (Mole, 2007: 3). The process of making salient “us and them” distinctions influences how actors see each other, as these categories perceptually enhance similarities within the group (“we’re all much the same”) and stress the differences between groups (“we’re different from them”) (Tajfel, 1981: 101). It is also significant to note that “the nature of groups, the signifiers used to demarcate group boundaries or the group norms that prevail at any given time” are “socially constructed and therefore culturally specific and historically contingent” (Theiler, 2003: 262).

The third premise brings in discourse analysis as a methodological tool. The concept of “discourse” was founded by Michel Foucault, who employed various understandings of it. His broadening of the term was intentional and clearly said – “instead of gradually reducing the rather fluctuating meaning of the word ‘discourse’, I believe I have in fact added to its meanings: treating it sometimes as the general domain of all statements, sometimes as an individualizable group of statements, and sometimes as a regulated practice that accounts for a number of statements” (Foucault, 2002: 90). Apart from his definition of “discourse”, this article does not draw inspiration from Foucault’s work.

A great advantage of discourse analysis as methodological instrument is its flexibility. Instead of applying a fixed mechanism to every empirical case, some discourse scholars employ the approach in less constricting ways and “articulate their concepts in each particular enactment of concrete research” (Howarth, Norval, Stavrakakis, 2000: 5). Rather than prescribing one specific manner of conducting investigations, discourse analysis stands for a general orientation to the study of constructed social phenomena, underpinning social elements, historical embeddedness and consequences in terms of representations, identities and knowledge (Mills, 2004: 124). Our interest lies in the relationship between identity and discourse as illustrated in security strategies and policies. That is why the methodological approach has been tailored to serve the research purpose.

The methodology of discourse analysis adopted here relies on the idea that “[d]iscourse’ is speech or writing seen from the point of view of the beliefs, values and categories which it embodies; these beliefs constitute a way of looking at the world, an organization or representation of experience” (Mills, 2004: 6). As a research method, the objective of discourse analysis is to uncover the manner in which versions of the world,

society, events and inner psychological universes are (re)defined in discourse (Potter, 1997: 146). Discourse researchers tend to reject “epistemic realism” and prefer “a logic of interpretation that acknowledges the improbability of cataloguing, calculating and specifying ‘real causes’”, while looking closely at “the manifest political consequences of adopting one mode of representation over another” (Milliken, 1999: 225-226).

Here the interpretative approach has investigated the process of “articulation” as conceptualized by Weldes (1999: 98-99) – “the process through which meaning is produced out of extant cultural raw materials or linguistic resources. Meaning is created and temporarily fixed by establishing chains of connotations among different linguistic elements. In this way, different terms and ideas come to connote or to ‘summon’ one another, to be welded into associative chains that make up an identifiable, if not a logically consistent, whole”. Repetition ensures the successful articulations of certain understandings, whereby “these linguistic elements come to seem as though they are inherently or necessarily connected, and the meanings they produce come to seem natural, come to seem an accurate description of reality” (Weldes, 1999: 99). The EU has articulated and rearticulated its identity as “security provider” over time, which underlines the ongoing search for ontological security in the international arena.

### **The EU Global Strategy (2016)**

The EUGS was officially presented against a problematic European political background, which the document itself depicted as “times of existential crisis, within and beyond” the Union (EUGS, 2016: 7). The British referendum to leave the EU was perhaps an unexpected blow, but the wider European region had become more unstable and insecure for some time. Terrorist attacks on EU territory surged in 2015-2016, which highlighted that the EU was facing critical internal and external situations that could not be overlooked any longer. Critical situations are threats to ontological security and identity narratives because they disturb the “institutionalized routines” of actors (Steele, 2008: 12). These crises had severely undermined the credibility of the EU’s identity as security provider, both within and outside its borders.

Thus, great expectations were placed on the EUGS. The document needed to reinforce the EU’s ontological security since, as the EU High Representative for Foreign Affairs and Security Policy – Federica Mogherini - declared, it was “precisely at such times of crisis that signalling European unity is (...) a due act of political responsibility” (Tocci, 2016: 470). The EUGS embodied a revised vision intended to maintain the Union’s identity as security provider, by adapting the narratives to reflect the changes in the security context. The concept of “resilience” played an important function in this respect, being fluid enough to encompass a wide range of initiatives and at the same time address to some extent the disappointing aftermath of the ESS – the failure to effectively promote long term democratic values in the neighbouring areas. Even so, the endeavour to reinforce the EU’s ontological security has remained only partially successful, because the discursive move temporarily gives credibility to the EU’s identity narrative and has not surpassed the underlying problems of EU external actions.

Foreign policy strategies do not emerge in a socio-economic vacuum, as they are the “product of the intersection between domestic politics and the international environment” (Grevi, 2016: 1). This aspect has been particularly relevant in the case of the EUGS, a document which aims to bridge the gap between inside and outside policy directions. To implement the United Nations Sustainable Development Goals and respond to challenges like migration, the EUGS (2016: 11) has proposed the idea of a “joined-up



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Union” that shows unity and coherence across “external policies, between Member States and EU institutions, and between the internal and external dimensions of our policies”. The text also talks about adopting an “integrated approach to conflicts”, considering that “[s]ustainable peace can only be achieved through comprehensive agreements rooted in broad, deep and durable regional and international partnerships” (EUGS, 2016: 9-10).

Working towards a “joined-up” EU has been a longstanding goal, yet its fulfilment is highly pressing in the current context, when “[i]nternal and external security are ever more intertwined” and “security at home entails a parallel interest in peace in our neighbouring and surrounding regions” (EUGS, 2016: 14). In an increasingly interdependent world, instability in the European vicinity and conflicts in the Middle East and Africa influence severely security and development inside the EU, by producing spill-over phenomena such as migration, transnational crime and terrorism. Connecting the internal and foreign security policies is “a necessity for countering these spill-over effects” (Zandee, 2016: 1). That is why the EUGS (2016: 18-19) first looks “at home” to efficiently deal with “terrorism, hybrid threats, climate change, economic volatility and energy insecurity”. Then the EU intends to “take responsibility foremost in Europe and its surrounding regions, while pursuing targeted engagement further afield” (EUGS, 2016: 17).

The shift in discourse, which effectively narrows the scope of EU security policies, has not escaped scholarly attention. Some have regarded it as a “soberer self-evaluation”, when comparing EU influence to that of traditional security actors like the US and NATO (Mälksoo, 2016: 382). Others have considered it “a continuum”, in which “what changes is the spectrum, or intensity, of Europe’s responsibility and engagement”, whereas the EU remains “a multi-regional power with global presence and outreach” (Grevi, 2016: 6). The optimists view EU member states as simultaneously preparing to act like “full-fledged partners and security providers” in the extended neighbourhood, playing a “selective and non-principal role in regional geopolitics and security affairs” and “investing in global governance” (Grevi, 2016: 6).

However, by adopting an ontological security perspective, the discourse shows that the EU’s identity has been redefined within a specific narrative, which tries to render it more credible among prominent international players like the US. The US as a security actor have historically undergone periods of isolationism or selective involvement in international affairs, as well as times of unilateral interventionism (the 2003 Iraq war). By contrast, the EU aims for a balanced identity and international role, taking into account past criticism that it had an unrealistic agenda on achieving many of its foreign policy and security goals. The famous “capability-expectations gap” (Hill, 1993) has been somewhat addressed in the EUGS, which contains a more grounded vision for the security provider identity, stemming “as much from a realistic assessment of the strategic environment as from an idealistic aspiration to advance a better world” (EUGS, 2016: 16).

The new guiding approach for EU external action has been called “principled pragmatism”, a middle ground “between the Scylla of isolationism and the Charybdis of rash interventionism” (EUGS, 2016: 16). In International Relations terminology, principled pragmatism is “Realpolitik with European characteristics” (Biscop, 2016a). It does not refer to the Machiavellian version with the end justifying the means, rather a return to the original sense that rejected liberal utopianism and not liberal ideals. The original interpretation of Realpolitik “held out a vision of the future and a guide for how to get there” or attempted to implement ideals in a realistic manner (Bew in Biscop, 2016a: 1).

Moreover, the discourse suggests that the EU's redefined identity as security provider could empirically base itself in economic diplomacy. Commissioner Mogherini made a series of comments in the foreword to the EUGS (2016: 3) - "Our diplomatic network runs wide and deep in all corners of the globe. Economically, we are in the world's G3. We are the first trading partner and the first foreign investor for almost every country in the globe. Together we invest more in development cooperation than the rest of the world combined. It is also clear, though, that we are not making full use of this potential yet".

Economic diplomacy features among the EU's foreign policy tools; for example, negotiating access to the internal market, economic regulatory influence at international level and the extensive sanctions regime against Russia. It would be sensible to expand and improve a mechanism that is already in place. Unfortunately, the main body of the EUGS did not explain how the potential of economic diplomacy mentioned by commissioner Mogherini could be further developed. The EUGS has instead put forward "a more expansive and noticeably more smart power-oriented approach - a combination of both hard and soft power" (Davis Cross, 2016: 403).

Overall, the changes in EU discourse and scope of security policies were long overdue to reflect the complicated international security context, especially in the Eastern vicinity with its more or less frozen conflicts around the Black Sea – Moldova, Ukraine and Georgia. The ESS had stressed the promotion of stability and democracy, but the EU registered a problematic track record in stabilizing, let alone democratizing, the surrounding regions (Smith, 2017: 278). Ontological security requires consistency and international recognition for the identity narratives, hence the need to counteract the quite disappointing outcomes of the EU foreign and security policies until the present.

The EUGS has transitioned from promoting stability and democratic principles to the concept of "resilience", defined as "the ability of states and societies to reform, thus withstanding and recovering from internal and external crises" (EUGS, 2016: 23). Resilience plays a significant function in the discursive efforts to render the EU's security provider identity more credible and at least somewhat supported by concrete results. It is meant to be "a broader concept, encompassing all individuals and the whole of society (...) featuring democracy, trust in institutions, and sustainable development" (EUGS, 2016: 24). The term "resilience" has become increasingly popular in EU documents – the 2012 EU Approach to Resilience, the 2013 EU Action Plan for Resilience in Crisis Prone Countries and the 2014 Resilience Marker, as well as with a range of international actors.

Compared to previous foreign policy strategies, the EUGS has underlined state and societal resilience in the surrounding regions as a second priority after domestic security (Tiilikainen, 2016: 4-5). The notion's presence in the EUGS has been welcome by some policy analysts and academics, since it arguably overcomes "the inconclusive and eventually counterproductive argument about the balance between stability and democracy" (Ülgen, 2016). In relations with its neighbouring states, the EU has often been accused of indirectly promoting stability over democracy by maintaining trade operations and financial assistance, despite a regime's questionable democratic standards. This generated a never ending discussion about migration concerns and how the EU needed to prevent further regional instability and foster economic growth, otherwise its internal prosperity and security would be directly impacted.

Resilience has been interpreted as moving away from the "transformative agenda" based on the propagation of democratic values, which assumed that all states in the European Neighbourhood Policy (ENP) truly wanted change; it can be argued that the

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mostly absent willingness to reform contributed to the inefficiency of the ENP in certain states like Algeria, Belarus, Egypt and Moldova (Techau, 2016). While the EUGS (2016: 9) seems to retain faith in the ENP's "enduring power of attraction" that "can spur transformation", the strategy has placed an emphasis on building "paths to resilience" in "countries within and beyond the ENP". The EUGS take on resilience involves supporting "the conditions and capacity for sustainable, endogenous political processes and economic development" (Grevi, 2016: 7).

Still, what does resilience actually mean and why has it been increasingly popular in EU documents? The literature on security employs the term to illustrate the reactive capacity to harm and "the underlying ability to endure disaster", ranging from natural ones to acts of terrorism and global financial instability (Bendiek, 2016: 2). Resilience reflects the profound change in contemporary security risks and challenges, which are "characterized by complex interdependencies, transcendence of geographical as well as disciplinary boundaries, and the complete absence of straightforward solutions" (Wagner, Anholt, 2016: 418). Crises such as those in Ukraine, Syria, Libya and the failure of post-conflict reconstruction in Iraq and Afghanistan drastically affected the optimism of the ESS. Terrorist attacks on EU territory have also proliferated, targeting Brussels itself.

Against such a difficult security background, resilience constituted for EU policy makers "a perfect middle ground between over-ambitious liberal peace-building and the under-ambitious objective of stability" (Wagner, Anholt, 2016: 417). The ambiguity of resilience contributed to it being universally accepted or at least uncontested. Stakeholders with different perspectives agreed on using this concept due to its fluid meanings. Resilience can be understood as "a call for more defence spending, or as an upgrade of development policy within a comprehensive, 'joined up' approach, or as a move away from liberal peace-building" (Wagner, Anholt, 2016: 417-418). But the same fluid understandings have resulted in two vulnerabilities indicated by the academic literature: lack of conceptual clarity and applicability parameters.

Resilience is seen as a "catchword", whose incoherence and ambiguity could take for granted severe issues and not try to uncover their causes or find effective, long-term solutions (Smith, 2016: 451). Equally problematic is the practical application of the notion due to its wide reach – state and society, where there are no specified objectives and "every bit of EU action (...) can be claimed to serve the cause of resilience" (Ülgen, 2016). That is why resilience risks eventually becoming an obsolete "alternative to [democratic] transformative approaches" (Steinhilber in Bendiek, 2016: 2). Or even worse, resilience could be treated as justification "for the limits of international intervention, ideologically reifying the limits to transformation as internal products" of societies (Chandler in Wagner, Anholt, 2016: 421).

In June 2017, a report was issued about the progress of implementation regarding the EUGS after one year. On that occasion, the EU interpretation of the term "resilience" was clarified as follows: "The European Union adopts a transformational approach to resilience, aimed at protecting rights, building political participation, fostering sustainable development and security. We aim to do so in a manner that enables states and societies to withstand, adapt, recover and respond to shocks and crises if and when they arise" (EUGS – Year 1, 2017: 14). Some of the conceptual ambiguity inherent in the notion has been dealt with, but it is too early to have an informed opinion about its practical application.

Thus far, the results reported by the first year review of the EUGS about state and societal resilience have targeted impact. A few examples include financial assistance for

Ukraine's reforms on corruption, public administration and judiciary; working with Libyan authorities to improve the living conditions of migrants; helping to provide education and professional training for Syrian refugee children and young people in Jordan and Lebanon; support for Tunisia's civil administration reform and contributing to stability in the Sahel region (EUGS – Year 1, 2017: 14-15). All are tangible and encouraging results obtained by an actor that is not yet "a strategic, unitary or autonomous player" (Arteaga, 2017: 3).

Nevertheless, resilience is not the long term solution to reinforcing the EU's ontological security. The concept has contributed to a more credible identity narrative as portrayed by the EUGS, without addressing the core problems of EU foreign and security policies. The EU's recognition as security provider largely depends on its development of shared military capabilities. Collective defence at the European level or the EU's "strategic autonomy" has been depicted as an "ambition" in the EUGS (2016: 4). Not a surprising choice of words since its fulfilment has been rendered even more complicated by the forthcoming Brexit, bearing in mind that the United Kingdom is one of the main military powers in the EU (Biscop, 2016b).

Resilience as a goal has only sidestepped the challenge faced by the EU, which is choosing between cooperation with undemocratic governments and the promotion of liberal ideals like human rights. In the eastern neighbourhood, there are two meaningful examples of this dilemma. EU officials have repeatedly expressed concern about the Erdoğan administration's escalating violation of democratic rights and liberties in Turkey after the failed coup (July 2016), yet EU-Turkish collaboration on shared interests such as fighting terrorism and controlling migration has taken precedence. The EU had signed a deal in March 2016 where Turkey was promised "aid, visa-free travel for its nationals and accelerated membership talks" in exchange for reducing the migratory influx (BBC, 2016). A non-binding vote by the European Parliament in November recommended suspending talks about Turkey's EU accession. President Erdoğan responded by threatening to open the borders for the migrant flow towards the EU, if things went any further (BBC, 2016). Turkey is aware of its prominent role in controlling migration and will use the advantageous position to the fullest, which leaves the EU in an uncomfortable situation with no guiding light from the concept of "resilience".

Similarly, Russia's aggressive foreign policy, which culminated in the occupation of Crimea (2014), remains a thorny topic. The EUGS (2016: 33) has acknowledged that "the relationship with Russia represents a key strategic challenge", which requires a "consistent and united approach" and "full respect for international law". The text mentions that the EU "will not recognise Russia's illegal annexation of Crimea nor accept the destabilisation of eastern Ukraine", at the same time cooperating with Russia "if and when our interests overlap" (EUGS, 2016: 33). The EU has imposed economic sanctions on Russia, but it is difficult to maintain a consistent and united approach between member states "feeling the heat of Russia's assertiveness in the east and those wishing to reset the clock to pre-2014 normality" (Tocci, 2016: 468). There is also the incentive of Russian energy supply, which continues to be inescapable for many EU members as they are dependent on it. Unfortunately, the EU as a regional security provider has slim prospects to prevent Russia from destabilizing states in the near abroad, let alone actively help to compel Russia to retreat from Ukraine's territory.

### Conclusions

On a final note, there is an array of positive and negative aspects to take into account when analyzing the EUGS. The timely release of the strategy, following the official announcement of the British referendum decision to leave the EU, served as a proclamation of European unity for the present and foreseeable future. It was a good political tactic, forestalling “much of the sharply critical ‘end of Europe’ rhetoric”, which tends to be popular in the international media (Davis Cross, 2016: 405). The EUGS also represents a policy statement rich in identity narratives, intentions and potential, yet only time can tell how successful and durable their application will be in practice. The much anticipated concrete results of the EU foreign and security policies depend on many factors, since the EU’s nature as a political actor limits the clarity of goals, set timeframes and methodological approaches that can be adopted, compared to national strategies (Arteaga, 2017: 3).

Even so, this article has been particularly concerned with how the EU’s identity as security provider has been rearticulated in the EUGS. It has employed a conceptual perspective and methodology based on ontological security and discourse analysis, which draws from three socio-psychological insights about identity and discourse: states and international organizations treated as subjects; identity as the product of socio-cognitive processes of self-identification and categorization; the relationship between identity and discourse as conceptualized by the mechanism of articulation. Ontological security relies on identity narratives being consistent over time and space and being affirmed by other international actors. External recognition also stems from how credible those identity narratives actually are and whether the empirical reality confirms them or not.

By using an ontological security viewpoint, the EUGS emerges as a key document that shows the reconfiguration of EU identity within specific parameters, whose main purpose is to render the identity narratives more grounded. The EU as security provider has constructed a balanced vision, which distinguishes it from traditional security agents like the US who have alternatively undergone periods of isolationism, selective involvement and unilateral interventionism in global affairs. The EU needs to represent a different type of security provider, because it ultimately has very limited shared military capabilities compared to the US. That is why the EU aims for a realistic approach to security policies, in an attempt to counteract the failed expectations of the ESS and the disappointing outcomes of its external actions, especially in the eastern vicinity.

Furthermore, the international security context had changed substantially from 2003 to 2016, which had to be reflected in the EUGS. The strategy has advanced a redefined image about the EU’s external directives, with resilience as central pillar. The notion of resilience plays an important role in the discursive efforts to make the EU’s security provider identity more credible and at least partly confirmed by tangible results. But the discursive shift from democracy promotion to resilience remains partially useful, since the fundamental issues and challenges of EU foreign and security policies have not been overcome. To conclude, the EUGS symbolizes a step forward in the right direction regarding the EU’s security agenda, with lots more to be hopefully accomplished in the future.

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## ORIGINAL PAPER

## “Spider Diplomacy” as a Complementary Explanation of the New International Circumstances

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### Abstract:

The new century with the dynamics of international relations has challenged theories, as it called Popper ‘strict universality’ and the need for ‘numerical universality’ theoretical explanations. In the twentieth century, theories of international relations developed, but these theories are in the battle with explanation *changes* rather than *expanding* the theoretical framework. The need for new explanations doesn’t reject old theories, only requires their axioms to be more inter-theoretical and with new variables that explain the course of the deliberate actions of state actors to the intended purpose. So this theoretical *change* and the acquisition of some *realistic axioms*, by adding inter-theoretic *variables* (pragmatism, foreign policy analysis, offensive realism, and defensive realism), sends us to a theorization we have called “*spider diplomacy*”. Almond in the 1960s considered that “with the decline of the norms and traditions of political sciences, the need for political theory and theories has increased”, where we find the same situation today for explaining the new geopolitical and geostrategic circumstances. Therefore, these circumstances we try to explain, through “spider diplomacy” as hybrid theory for empirical, inductive, probable and testable studies based on three initiatives of international subjects (from state actors to non-state actors, from state actors to other actors state, and mix). With this research we have analyzed the causes and the chronology of a diplomatic network, the wild stretch that Russia is trying to make today and Serbia in the new state of Kosovo. But for the illustration we have taken another example from the past. One of Israel's wars with Arab countries. We have found verifiable, pragmatic and analytical results that prove the “spider diplomacy” scheme is needed.

**Keywords:** *spider diplomacy; realism; Western Balkans; Israel; Russia; Serbia*

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### **Introduction**

Since ancient times mankind has been trying to find forms and ways of explaining and predicting events, even explanations and predictions derive from primitive superstitions, whether from the political, social, wars and economic spheres. Greek civilization has achieved in many spheres of social sciences but also the exact origins of scientific or synthetic sciences, the sophists, as well as Hesoid, Pythagoras, Plato, Aristotle, Alcimus, are just a few names that have contributed so much to the division of normative with the natural. They have succeeded in convincing themselves and others that nothing is absolute and society evolves, that is, the "theory of change," then proceeding with "the theory of changing the opposite identity." Protagoras is the first to deal with the "theory of change" between nature and society, while Plato has written about the "theory of forms" and the return to genesis. Even Plato has had a 'totalitarian justice', making 'totalitarian science' that in many approaches can approach if not united with positivism. Karl Popper, who gives us powerful arguments to dismantle Plato, Hegel, and Marx's totalitarianism with his works for open society, and later with his work "Logic of Scientific Research". With this, Popper opens the doors to go to post-positivism, where science can be open and arguing more than with strict norms to explain and anticipate events. Popper does not believe in absolute theory, even he says that any theory one day will be invalid.

### **Can we have new theories?**

Many fundamental questions have been raised about why we need the theory, when we can ask the actors directly, or another fundamental problem, that the world is not so simple and people are not fully aware why they are acting in certain ways (Smith S. , 2013).

But can we be confident in the responses we receive from the actors, if we were to get honest answers, then we do not need theories. It would simply suffice for the media to report. But the world does not work that way. And we need theoretical approaches that help us to follow and explain the actions of international actors.

However, the theories did not always get all the confidence needed to explain and anticipate the actions of international actors. Theories are not gods, nor are uncontested truths. Thus, international relations are distinguished by other disciplines of science by the particular character; they are polyarctic, plural, complex and impulsive. (Sielski, 2007)

Theories are the nets to catch what we call "the world": to rationalize, explain and master it (Popper, Theories, 2002). Theories or the main attitudes of international relations are universal theory, or as Popper calls it, "strict universal theory." These theories with the dynamics of international relations have undergone changes and new *neo-isms* for explaining new circumstances. Even to go even further, after the September 11th incident there was a debate about the validity of international relations theories. (Bunyavejchewin, 2012)

It should be remembered that the debate on the validity of the theories is not attempted by the 21st century.

Mills said that building a big theory would be just an obstacle to the development of human sciences. In the 1990s Lemart said that it is a natural tendency of social thought to be released from the pressure to question the nature of what is going on around us. Such skepticism can also be found in Bell, in his book *The End of Ideology*, or in Aron's "The Intellectuals Opium". The two researchers claimed that the era of construction of great

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theories had been ideological. Isaiah Berlin in the 1970s had written a provocative article titled "Does Political Theory Exist?", Rewriting and publishing it in the 1980s (Sielski, 2007). However, the existence and continuity of international theories, especially the ordinary ones, cannot be put at any moment in doubt, especially by the term "strict universal theory".

It is impossible today to explain and anticipate international events without major international theories, but we will also be unable to explain and anticipate many international events if we are left behind by the dogma and the tradition of the great theories. Almond in the 1960s, with a scholarly work on theories of political science, claimed that the growth of theorists in this field coincides with the departure from the norms and traditions of political sciences, which is also pushing the increase of the number of political theories (Almond, 1966).

Therefore, in explaining and predicting the various events of the 21st century, the emergence of new theories based on the great theories allows us to approach more adequate explanations and forecasts, based on Popper's theoretical model, "numeric universality" or otherwise "singular attitudes". Referring only to a finite class of specific elements within a given spatial region. Attitudes of this kind, in principle, can be replaced by a union of singular attitudes; for a long time, all elements related to the class (assigned) can be counted.

That is the reason, why we speak in such cases of "numerical universality". (Popper, Theory, 2002).

Relying on *numeric universality*, we can have events and actions in international relations, such as having no substantial explanation from the great theories, and are such actions that want a particular explanation and prediction, which conflicts with what cover the *strict universal theories*. So, in different cases and actions of international actors, we need *theoretical hybrid* explanations, which are not general but are *singular or universal numerical attitudes*.

We can not explain with enough realistic theory, the support of an international actor, terrorist groups against an international actor, nor the Russian demagoguery call for peace in Syria. Or China's investment actions for new jobs in parts of the world, when a part of its people are facing, poverty and big problems for a good life.

So, pushing forward theoretical changes and the creation of hybrid theories, we come to a functional viewpoint of constructing the theory. From a functional point of view, P. Sztompka said that theory can be made by emphasizing its autonomous functions - theory as a means of constructing a theory. Sztompka also said that his instrumental function could be emphasized - understanding the theory as a set of theorems that allow a practical action or a set of theorems that enable the explanation of facts or generalizations - answers the question "why?" (Sielski, 2007).

Taking the theory as a tool for constructing a theory, along with the autonomous function of theory, we can take theorems and axioms as needed from the strict universal theories that would allow us to help create the necessary and universally demonstrable hybrid theory, and enables us to explain the facts and anticipate events by answering the question "Why?".

But we need to consider and give an explanation for our research needs that the theories are divided into five categories: big theories, general theories of certain scientific disciplines, theories of a wider area, the theories of the middle zone, and theories of details. (Sielski, 2007).

Given the above division, one should bear in mind that the question of meta-theory does not pose a problem in the matter of theoretical study, since considering the categories, it is apparent that each category is the category of the preliminary category, among others, meta-theory has had a debate whether it is scientific or not, but to our research at this stage, it is not accepted for explanation. After attempting to elaborate on a theoretical basis for new hybrid theories, we are in a position to explain a theoretical hybrid scheme that will try to fill where it can and in a hybrid way to clarify the actions of the international actors.

### **International Theories and 'a neutral theory'**

The study of international affairs is best understood as a protracted competition between realistic, liberal and radical traditions. Realism highlights the steady tendency for conflict between states; liberalization identifies several ways to mitigate these conflicting tendencies; and the radical tradition describes how the whole system of state relations can be (Walt, 1998).

Theories of international relations in their explanation essentially hold the protection of their axioms by defending or even describing the actions of international actors within the theory. Indeed, great international theories manage to eloquently prevail over each other always being dependent on their theoretical and normative dogma. Sometimes they tend to persuade their tendencies as their intentions move from theoretical falsification to the exact one.

Criticisms on international relations researchers are increasing each day more and more, as field professionals are failing to explain the events at least to approximate the projections, since they focus more on theories and models predicting behavior rationally consistent with predictions of theories and realistic or liberalistic rationalism, fail to explain the events and dilemmas which are a hybridization and an inverted pyramid to their great theories and their neo after World War II. Who predicted that it could come to a meeting of US President Trump with the North Korean dictator?

But we must make it clear that international actors do not design theory, but only events, and theory compiles scholars. Therefore, there is a need for some pragmatic academic empiricism to go beyond the traditions of Cold War concepts.

Avoiding 'isms' is an approach that would allow us to leave the dogma and the ideology that a theory must necessarily represent an ideological stream that explains the actions of an actor. Unfortunately, like economists according to Sharma (Sharma, 2017), edhe studiuesit e marrëdhënieve ndërkombëtare janë të prirur të injorojnë çdo faktor që është shumë i komplikuar për t'u kuantifikuar ose inkorporuar në një model shpjegimi ose parashikimi. even international relations researchers tend to ignore any factor that is too complicated to quantify or incorporate into an explanatory or prediction model. And this not by not knowing, but by the fear of experimentation, turning the concept of *theory* into the *universality of reality* that is more like positivism than with *testability* and falsification. Or if we continue with just a traditional approach, one day we can go to the theory of crowds in international relations according to the theory of economist Surowiecki (Surowiecki, 2005), or the Law of Goodhart (Goodhart, 1984).

If we want more scientific and pragmatic clarity of the actions of international actors, then we should avoid theoretical defensiveness and experimentation, testing the various axioms with sub-fields of international relations theories, using them as *theoretical variables*.

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There are no permanent entities in the social sphere, where everything is under the shake of the historical influx. (Popper, Miti i origjinës dhe i fatit, Vëllimi 1: Magjia e Platonit (The Myth of Origins and Destiny, Volume 1: The Magic of Plato), 1950). So we are not in contravention of the *methodological essentialism* developed by Popper. Besides, we do not want to accept a theological scientific dogma and have scientific priests, or to revive once again positivism, but to be always in the search for the capture of a forging, testable, observable and predictable truth.

### An example from the past for building a hybrid theory for contemporary needs

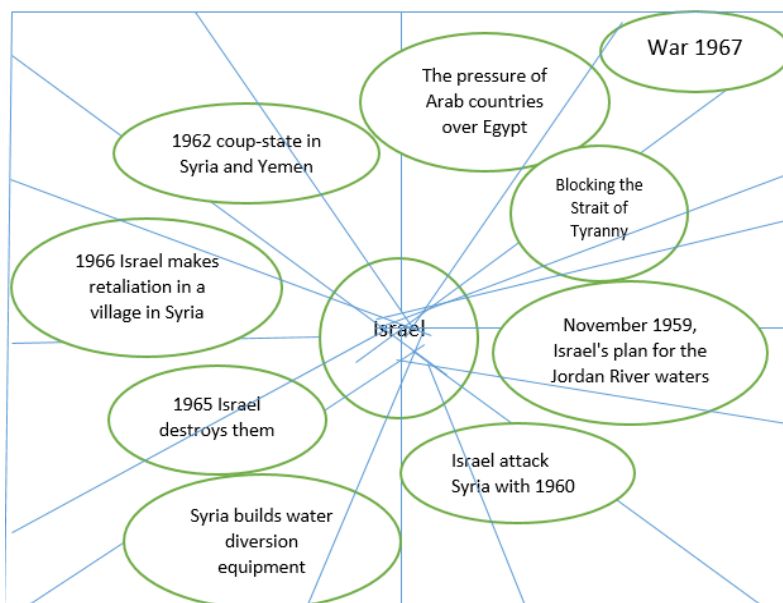


Figure 1. Israel spider diplomacy: Authors' own compilation

After the war in 1957, Israel gained a credible reputation for its offensive and preventive power. Nasser, now recognizing this power of Israel and the weakness of his country and Arab countries, by military power and unity for Israeli isolation, decided to pursue himself despite political pressures coming from Arab countries. (Smith C. , 2004) However, Israel who benefited from Arab countries' mistakes was not in favor of allowing a peace in the Middle East, which would potentially enable Arab countries to consolidate militarily and politically over this period. Therefore, he also wanted the region to keep it in battle and to take action. To provoke insinuations and dissatisfaction between Arab countries and create a state of war, Israel took a variety of actions. The actions outlined in scheme ... show that spider actions of Israel are also based on compelling theory, where it is shown that Israel's interactions have also fueled reactions within the Arab world itself and numerous dissatisfaction with Egypt and the regime of Nasser. Where in spider diplomacy we find that this spider diplomacy is the order in which it intervenes imposing and exploiting and returning to its favor the actions of other countries as in the case of Israel. Israel, besides pointing to beneficial strategic points, their goal was to gain recognition from Egypt and to change the approach of Egypt, even by offering it back to Sinae in exchange for recognition (Smith, 2004).

This section is written for research needs, and there are certainly many parts that can be added, but a pragmatic basis for an offensive and defensive external analysis of an international actor is needed.

So from this scheme mentioned above we have found that there is a correlation of premeditated events that produce targeted effects, such as a theory that factor A produces the cause B, and this is what we call it "spider diplomacy".

### **The development of theory in the context of the "spider diplomacy" analysis**

The beginning of political science and later of international relations as science and practice has had a confrontation, not least from the division with the economic sphere. If all states intervene to regulate and limit problems with economic markets, and markets create effects that affect states' behavior, (Rosenberg, 1994) then why was the discipline of international relations, or political sciences in general needed. In order not to waste space in answering this question, Rosenberg simply opens the door to "for deeper answers we need to go out of the existing discipline ...". (Rosenberg, 1994)

The creation of study disciplines has covered many gaps in understanding the practices and actions of states. How could we understand the missile crisis in Cuba if international relations were not a discipline in itself?

Every discipline and subfield of politics has its own rise and a process that is not infrequently long and very contradictory, especially when facing new pragmatic strategies like; George W. Bush's "Preventive War" strategy, Barack Obama's "Patience Strategy," and last by Donald Trump, "Strategic Responsibility," "Chaos Strategy," by Russian General Valery Gerasimov, and others.

So, if we rely on what they call 'general actor theory' in international relations, (Hudson, 2005) and in the induction research method, two different sides of the coin at first glance, but with the sub-field of international relations, the foreign policy analysis, find a practical co-operation method.

This is because, as Lane explains, the foreign policy analysis is positioned to provide a concrete theory that can revive the link between the theory of the general actor in international relations and the founding of social science. (Lane, 1990).

Here we come to the levels of analysis where three of them directly influence international relations. While in the analysis of "spider diplomacy" we have to be within interstate level in cooperation with influences such as power (war and diplomacy), balance of powers (treaties and summits), alliance formation (trade agreements and deals) and dissolution of alliances (NGOs and reciprocity) (Goldstein & Pevehouse, 2014)

### **"Spider diplomacy" paradigms**

As a kind of evidence to draw some diligent explanations of "spider diplomacy", we have stopped at two quick examples, one involving Russia and the other with the Western Balkans.



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Ukraine's ambassador to Serbia, Oleksand Aleksandrovych, stated: "Russia is training Serbian mercenaries to kill in Ukraine. Russia is using Serbian extremists to make a coup in Montenegro. Russia Encourages Serbian separatism (Bosnian Serb-dominated entity) in Republika Srpska to destabilize Bosnia and Herzegovina. Russia is using the Serbian factor to destabilize Macedonia. Russia is playing an active role in countering Kosovo Serbs against Albanians in Kosovo. Russia is selling arms to Serbia to create tensions with Croatia. (Zivanovic, 2017).

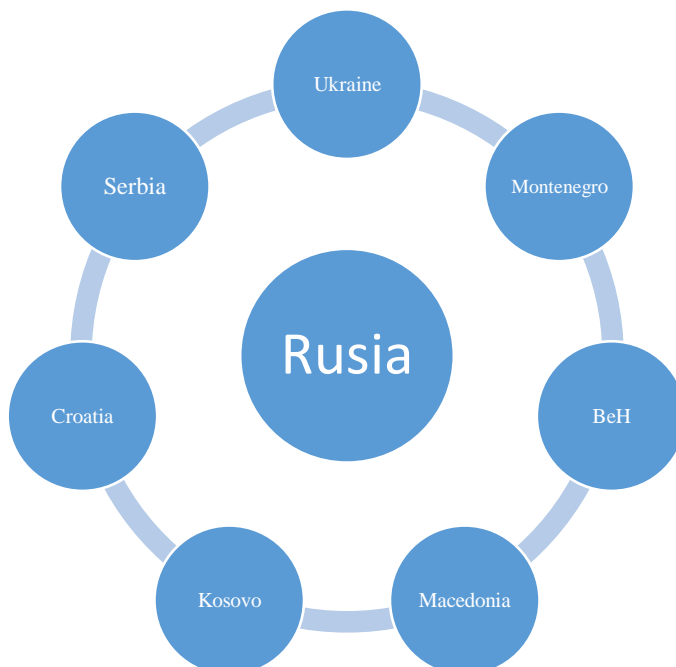


Figure 2. Russia spider diplomacy: Authors' own compilation

If we look at Figure 2, then we draw a concept of two levels of "spider diplomacy", the level where its feet are to a state actor somewhere else and head somewhere else.

So, "spider diplomacy" includes three sub-concepts:

1. Spider diplomacy based from state actors to non-state actors;
2. Spider diplomacy based from state actors to other state actors; and
3. Spider diplomacy mixed.

In the case of Russia based on Figure 2, we have the case of a six-factor diplomacy, five of them belonging to the sub-concept, and only a state-owned actor concept with a state actor.

Another chronological illustration can be the statements and actions of politicians in governance in Serbia over Kosovo.

Serbian President Aleksandar Vucic, before the informal meeting with Kosovo President Hashim Thaci, said a dialogue on the fate of Serbs should be held not only in northern Mitrovica, but also within Kosovo and Metohija because they are vulnerable and discriminated. (B92, Vucic and Thaci to meet in Brussels on Thursday, 2017)



Figure 3 Serbia spider diplomacy: Authors' own compilation

Ana Brnabic, Serbia's prime minister, then stated that a dialogue on autonomy for northern Kosovo needs to be discussed and then talks on the final status of Kosovo, and if Serbia is obliged to choose between the EU and Russia, it will choose the EU -in. (Savic, Filipovic, 2017).

Brnabic, again said that Serbia would be EU partner and friend of Russia (B92, EU is our partner, Russia our friend - PM, 2017).

Jadranka Joksimovic, Serbia's European Integration Minister, stated that Serbia will receive over 1 billion euros of EU aid for the membership process by 2020. (MEI, 2017)

Milovan Drečun, head of the parliamentary commission in the Serbian Assembly for Kosovo and "Metohija", stated that the Special War Crimes Tribunal committed by former senior officers of the "Kosovo Liberation Army" is the international community's latest attempt to judge crimes against Serbs and non-Albanians, and Serbia will help this process.

Ivica Dacic, stated that Serbia would never break relations with its permanent allies that are Russia and China under any condition (RS: MFA, 2017).

Brnabic: Russia is an important partner of Serbia and we want to deepen cooperation in the development sector, research and university cooperation (B92, EU is our partner, Russia our friend - PM, 2017).

These two actions of Russia and Serbia are the first basic tests that become "spider diplomacy".

### **Explanation through spider diplomacy**

Kosovo on 26 August 2015 signed the agreement on demarcation of the border with Montenegro ((Agreement), 2015), where the same day was protested in Peja against this agreement, then a day after the signing of the agreement, a group of professors from Kosovo publish a research on the issue of demarcation of Kosovo with Montenegro,

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(Gruda, et al., 2015) while the then opposition to the Kosovo Assembly in October at the beginning of the parliamentary sessions had begun throwing tear gas in the assembly hall, expressing dissatisfaction with the agreement.

A survey of the Kopaonik Mountains in northern Kosovo, since in the past, there has been built a military remote radar ranging in the Mediterranean, and then bombed by NATO in 1999, mountains dividing Kosovo's border with Serbia, we find data on new geostrategic movements. From satellite maps it is noticed that military remote control has been reconstructed and according to Serbia's geo-portal, the border line with Kosovo has moved to 600 hectares, (geoSrbija, n.d.) while the Kosovo geo-portal says the opposite. (The State Geoportal of the Republic of Kosovo, n.d.)

From this we have that Belgrade's approach to the north of Kosovo will be done by allowing Serbia to take control of the Kopaonic Mountains and Zubin Potok, two important strategic points, with Montenegro in NATO and the positive epilogue it got on March 21 2018 in the Kosovo Assembly after Kosovo's internal disagreements to limit the border with Montenegro, by an extended diplomatic activity of the international factor, would give the region a perspective on NATO membership in response to Russia and Serbia with bases their military in the Presevo Valley and the head of Kopaonik.

From Vucic's request for internal dialogue for Kosovo in Serbia, Bernabic's request for autonomy for the north and talks on Kosovo's status, evidence on the military remote control in Kopaonik and the border line there. On the other hand, the issue of strategic points in the West of Kosovo at the border with Montenegro shows a spider scheme that sends us to the point where: Serbia will keep the Kopaonik Mountains and opposite it there will be NATO from Çakorri, Zhlebi and Kulla, and thereby free the paths for more technical observations on the final settlement of Kosovo's issue after providing at least one strategic point for Serbia and Russia in the Western Balkans.

From this we have that spider diplomacy, according to the paradigm of 'state actors towards state actors', shows that: a map is created which has many levers in order to preserve or increase the influence of an actor through geostrategic and geo-political exposures where best explain the analysis of foreign policy and pragmatism their intentions. An actor finds it hard to reach its goal or goals for either new geopolitical or geostrategic spaces or maintaining influence, without much action as a big chessboard.

### **Cold collision**

The rise of world-wide military technology, the spy and internet network, have created a "Hot peace, with cold showers" have created a "realistic liberalism," a pact to break the old pacts. We currently have a world with an obsolete international law, where most of the laws by which international relations are regulated are used only as justifications that every powerful state uses in its interest.

International politics in general and state policy in particular are experiencing the beginnings of the dark medieval states, and it is in primitivism just as when the first states began to be built and the church was divided by the state. Therefore, the streams are many times unpredictable, where each one is against each one as Thomas Hobbs tells us, or some states trying to remove fortifications according to the makiavelist proposition, so that only one principality or even today is paradoxical and dangerous countries. The removal of this fortification today is from the initiative of US President Donald Trump, who urged all NATO member states to contribute proportionally to this organization. Only this could fulfill the Alliance's strategic concept of basic security goals and duties for preventing and protecting from threats or aggression against any NATO member country.

Each country is independent and free to make its own decisions, but through common planning and resource allocation, they enjoy the collective security scale, much higher than what each one could achieve one. This remains the fundamental principle of cooperation in the area of security within NATO.

Invoked in *realpolitik* - foreign policy is based on calculations of power and national interest (Kissinger, 1994).

Trump's *realpolitik* today is to show the dependence of allies on the strongest in NATO, and to show that it has a willingness to protect Western interests in such a way that it links all on the basis of interest rather than belief. So a spider diplomacy, where is the net and who builds and rebuilds and keeps that network alive, and if someone tries to deviate, it will know the consequences correctly.

- Because it is clear that the world is in search of a new world order, and is ahead of the geostrategic clashes which, at certain moments in the periphery, also explode with acts of war.
- Because there are historically clear geostrategic confrontations between Russia and the West, Benn Steil has finally explained quite well (Steil, 2018).

While, a fierce policy of realism, but without arms confrontation, is also pursuing China, which is even stretching in terms of soft power, but in reality it is not. Because the latter has a deep mistrust with all the world powers and there have been wars with virtually all Western powers, and Russia. China is also taking care of the world, by funding millions of dollars in its image of geostrategic expansion.

Anne-Marie Brady of Canterbury University in New Zealand refers to China's intervention as a "new global battle" to "lead, buy, or force political influence." The result is different from the cold war - less dangerous, but more difficult to deal with. While the Soviet Union and the West were sworn enemies, China is a strong trading partner that is investing huge sums beyond its borders. (How China's "sharp power" is muting criticism abroad, 2017).

China is going beyond the theoretical explanations of the Cold War and beyond the explanations provided for the "Marshall Plan" or any other economic aid. China is not giving aid, but it is linking interests and dependencies, as China knows well that belief and geostrategic cannot be reconciled, while any struggle with the powerful is a mutual loss, then the expansion of the economy and dependence on Chinese products and investments, creates the network of interest and not the confidence to hold a state on it.

Major power struggles today are in the spying, internet and military technology advancement networks, where the latter is more used as an act of repression than real war, so in the future we can more clearly explain all actors' policies international, we will need a networking scheme over the three paradigms mentioned above, as in spider diplomacy.

### **Conclusions**

We have found a breadth of arguments on the possible ways to construct a theory where only a few are involved, and according to the need for international relations we provide a theory based on Popper's numeric universality, where we could cover the explanation of the actions in particular area of state actors and not state actors. And this through the three paradigms that we have mentioned above. This has enabled us to draw a hybrid theory based on the pragmatism of state actors, in the analysis of the foreign politics and in the offensive and defensive realism. So pragmatism is the key part of this concept. Spider diplomacy is not just a concept that explains state movements and tactics

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in foreign policy, but is based on analysis and is included in long-term strategies that have a clear purpose and aim at achieving it through multi-level offensive and defensive battles.

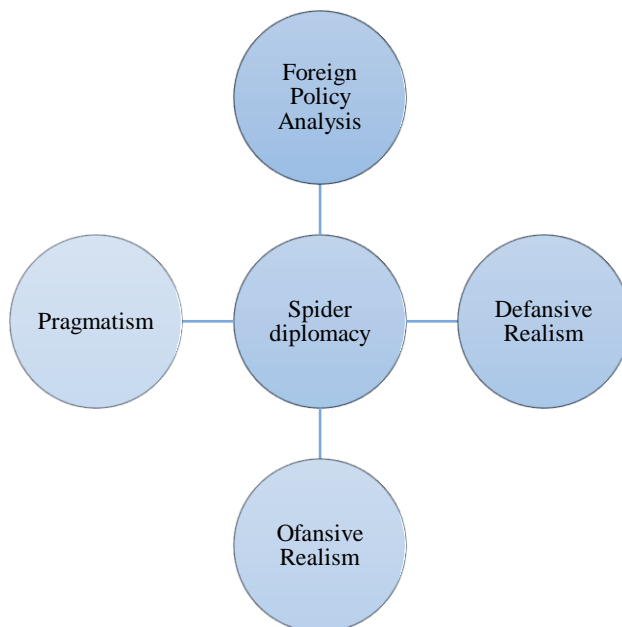


Figure 4. Sources of spider diplomacy: Authors' own compilation

"Spider-man Diplomacy" may not stay the time, and not suitable in many stages of the study, but this is not a disadvantage for this concept, because in a very polar, dynamic, and interdisciplinary science, theories are also failing to be able to explain the circumstances and predict theirs. In the spider diplomacy from the elaboration of two examples, we saw that its effect at first glance is just a ranking, but if we recall the ten reasons that send to the war of Van Evras, one of those reasons was about the strategies and secret actions of states with also secret purposes, spider diplomacy helps us build a scheme that similarly to chess gives us the chance to understand the whereabouts of a state actor who has taken such an initiative.

Spider diplomacy is the middle of explaining why a country or alliance is offensive and the other in defense.

Thus, spider diplomacy lies in the observation, elaboration and discovery of the goals and actions of states or alliances that aim to dominate the region, the continent, and to the hegemon.

Scientific works of such nature are in small numbers because the concept of spider diplomacy is a methodology that did not exist before, so it is difficult to explain and to find its advantages and disadvantages. However, it is only a starting point for welcoming more criticisms and studies, and this work in the future will be the source and incentive for such research. However, through this research and through spider diplomacy we have managed to argue the actions of state actors that would otherwise never get out of their mouths.

Theorizations are a difficult scientific field, and there are many dogma embedded in, which needs a courage to handle beyond what we know, but we should never be self-sufficient and create theoretical dependence, so a theory like spider diplomacy resembles

a scheme which is verifiable and falsifiable. In this case, a good understanding of the circumstances and an accurate ranking to understand and elaborate on the goals of state and non-state actors and real opportunities for achieving those goals are needed.

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**ORIGINAL PAPER**

**Analysis Framework of the European Commission:  
Monitoring Population, Human Capital and Inclusion  
in the Social Agendas n° 38 - n° 47  
(October 2014 - April 2017)**

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**Daniel Alin Olimid\*\***

**Abstract:**

The present paper scrutinizes the social and legal conditions and effects of the Social Agendas of the European Commission released between October 2014 and April 2017. Using the quantitative and qualitative content analysis, the paper argues that the population free movement and the social integration are formalized within the framework of the Social Agendas 38 to 47 linking the social challenges and the social innovation analysis. The paper also explores the main determinants of the population-human capital-inclusion linkage in the text of ten Social Agendas released between 2014 and 2017 following the related settings of: (i) the social dialogue; (ii) the social governance; (iii) the skills and training encounters; (iv) the European social services and social policies. The results demonstrate that the link between the social interaction and social innovation increases the social integration by recognizing the important role of living and working conditions and the European social framework.

*Keywords: Social Agenda, European Union, population, free movement, integration*

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## **Analysis Framework of the European Commission: Monitoring Population...**

### **Introduction**

The present paper emphasizes three key trends in the European Union (EU) institutional governance and policymaking adopted by the Social Agendas of the European Commission released between October 2014 and April 2017. Second, the paper explores the relationship between the European Commission policy-process and the social welfare at the institutional level scrutinizing the text of ten Social Agendas released between October 2014 and April 2017.

The research notes that the EU institutional governance enable the determinants of the social policy toward the human capital and inclusion following the related settings of: (i) the social dialogue; (ii) the social governance; (iii) skills and training encounters; (iv) the European social services.

The results demonstrate that the link between the key terms of the social policy in EU by recognizing the important role of living and working conditions, but also the institutional settings.

### **Literature Review**

Policy framework of the European Union is a broad concept exploring key terms, concepts, mechanisms, processes and policies in which institutions and institutional governance manage and direct the strategies and actions.

The present paper researches the frequency of the key terms defining the Social Agenda of the European Commission in the period October 2014-April 2017 and determining the relative utilization and appearance of various concepts developing the EU policies in the following areas: (i) healthcare, social services and safety; (ii) social dialogue, social market and social entrepreneurship; (iii) human capital, migration and social policies.

#### **Healthcare, social services and safety**

A key argument of the social research is to indicate the relationship between healthcare-social services and safety and the increasing role of the living conditions, quality of life and community healthcare (Rahtz, Sirgy, Lee, 2004: 167-198; Allen, Braithwaite, Sandall, Waring, 2016: 181-197). Moreover, contemporary events generate different perspectives in the literature review regarding: media monitoring (Georgescu, Olimid, Olimid, Georgescu, Gherghe, 2017: 109-122), transition challenges (Olimid, 2013: 9-18), social services structure, healthcare system and safety (at work) (Hutsebaut, 2003: 53-74; Cornelisse, Goudwaard, 2002: 3-17; Caminada, Goudwaard, van Vliet, 2010: 529-556).

Hutsebaut provides the theoretical framework of the social protection in the European Union enabling the role of the “financial resources”, “social infrastructure” and “social systems” (Hutsebaut, 2003: 53-74) and Cornelisse and Goudwaard define the framework of the “convergence of social protection systems in the European Union” (Cornelisse, Goudwaard, 2002: 3-17).

Orbie and Babarine explore the relationship between the working conditions and the structure of the EU social services and “development policy” (Orbie, Babarinde, 2008: 459-477). Hurt investigates the “self-interest” and the “EU development policy” as the most important factors of the linkage EU development-social services-self-interest (Hurt, 2010: 159-168). Other scholars give a systematic review of the relationship between the integrated institutional governance and the “development counting vectors” in the field of the social services and policies (Olimid, Olimid, 2016: 35-47).

### **Social dialogue, social market and social entrepreneurship**

Caminada, Goudswaard and van Vliet explore the perspectives of the “welfare state indicators” in the European Union considering the “social expenditures” and the “social assistance benefits” (Caminada, Goudswaard, van Vliet, 2010: 529-556). Moreover, Vandenbroucke concentrates on three aspects of the research on the social dialogue and the social market: the “European Employment Strategy”, the “labour market policies” and “policy rules” (Vandenbroucke, 2017).

Sarfati also bases the research on the linkage between the social dialogue, the social market and the “policies addressing ageing” by analyzing and reviewing the following social determinants: “demographic ageing”, “reforms” and “welfare systems” (Sarfati, 2006: 49-74). Hopt attempts to explain how the EU corporate governance adapts strategies and implements actions and plans in the field of the social mechanisms and the “financial statement” (Hopt, 2005).

### **Human capital, migration and social policies**

Most of the literature defines the linkage between human capital-migration-social policies considering three scenarios: (i) the *first* scenario focuses on the social processes and “the role of welfare systems” (Mytna Kurekova, 2011: 721-739); (ii) the *second* scenario scrutinizes the social work and social affairs (Michailakis, Schirmer, 2014). In the second scenario, Petersen and Puliga research the EU operational framework and rules in the field of migration and social policies (Petersen and Puliga, 2017).

### **Methodology**

The methodology of the paper designs elements of interdependent research in the field of population, human capital and inclusion within the Social Agendas released by the European Commission in the period October 2014 and April 2017 using the quantitative and qualitative content analysis.

The paper argues that population, human capital, inclusion and social integration are formalized using the manual coding of key terms of the Social Agendas 38 to 47 and bringing the social inclusion, social protection and social affairs analysis in the European institutional project.

The Social Agendas represent the European Commission’s overview and action in the field of the social interaction of the market conditions – social affairs – human capital – inclusion. The first example of the research design is the thematic areas of the “Special feature” of the Social Agenda released between October 2014 and April 2017. Table 1 entitled: “Special Feature of the Social Agendas n° 38 - n° 47 (October 2014 – April 2017) includes the tasks of each Social Agenda (Column 2, Table 1) and the category of the key terms (selected according to the special feature from Key Topic 1 (hereinafter KT) to Key Topic 51).

Moreover, the key terms research is classified on the basis of the functionality of the following linkages: (i) Healthcare, social services and safety (Table 2, Chart 1); (ii) Social dialogue, social market and social entrepreneurship (Table 3, Chart 2); (iii) Human capital, migration and social policy (Table 4, Chart 3). Classifying the key terms of the Social Agenda for a period of three years allows us to observe and identify how the thematic areas of the official documentation influence the policy-making process of the European Commission.

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**Table 1. Special Feature of the Social Agendas n° 38 - n° 47 (October 2014 – April 2017)**

<i>Social Agenda number (n°)</i>	<i>Key Terms (KT<sub>1-51</sub>)</i>
Social Agenda n° 38 October 2014	KT <sub>1</sub> = health; KT <sub>2</sub> = workers; KT <sub>3</sub> = social protection; KT <sub>4</sub> = social affairs; KT <sub>5</sub> = society;
Social Agenda n° 39 December 2014	KT <sub>6</sub> = EU (European Union); KT <sub>7</sub> = EU funding; KT <sub>8</sub> = jobs; KT <sub>9</sub> = working conditions; KT <sub>10</sub> = social Europe; KT <sub>11</sub> = social dimension;
Social Agenda n° 40 April 2015	KT <sub>12</sub> = European; KT <sub>13</sub> = people; KT <sub>14</sub> = population; KT <sub>15</sub> = demographic (changes); KT <sub>16</sub> = governance;
Social Agenda n° 41 July 2015	KT <sub>17</sub> = skills; KT <sub>18</sub> = training; KT <sub>19</sub> = traineeship; KT <sub>20</sub> = employment; KT <sub>21</sub> = unemployment;
Social Agenda n° 42 October 2015	KT <sub>22</sub> = labour; KT <sub>23</sub> = safety (at work); KT <sub>24</sub> = citizens; KT <sub>25</sub> = Member States; KT <sub>26</sub> = digital;
Social Agenda n° 43 February 2016	KT <sub>27</sub> = ageing (workforce); KT <sub>28</sub> = family; KT <sub>29</sub> = parents; KT <sub>30</sub> = children; KT <sub>31</sub> = mobility;
Social Agenda n° 44 June 2016	KT <sub>32</sub> = social dialogue; KT <sub>33</sub> = social innovation; KT <sub>34</sub> = social agenda; KT <sub>35</sub> = human capital; KT <sub>36</sub> = migration;
Social Agenda n° 45 September 2016	KT <sub>37</sub> = reform; KT <sub>38</sub> = education; KT <sub>39</sub> = culture; KT <sub>40</sub> = cultural; KT <sub>41</sub> = cooperation;
Social Agenda n° 46 December 2016	KT <sub>42</sub> = market; KT <sub>43</sub> = growth; KT <sub>44</sub> = investment; KT <sub>45</sub> = youth; KT <sub>46</sub> = enterprise;
Social Agenda n° 47 April 2017	KT <sub>47</sub> = European Social Fund (ESF); KT <sub>48</sub> = Fund for European Aid to the Most Deprived (FEAD); KT <sub>49</sub> = social exclusion; KT <sub>50</sub> = poverty; KT <sub>51</sub> = crisis

Source: Authors' own compilation according to the Special Feature of the Social Agendas of the European Commission n° 38 - n° 47 (October 2014-April 2017). Note: KT= key terms from 1-51

The nature of the research within the period October 2014-April 2017 will determine whether the key terms indicate a particular course of the policy-making of the European Commission in this period. In such case, Chart 1 to Chart 3 will provide conclusive information helping to enable a cause-and effect relationship between the key terms of each social agenda (for example, the frequency of the key terms in all social agendas).

Thus, Column 2 of the Table 1, Table 2 and Table 3 presents the key topic designed in Table 1, Column 3. Each column, from Column 3 to Column 12, designs the research results counted for each Social Agenda: Column 3: Social Agenda n° 38; Column 4: Social Agenda n° 39; Column 5: Social Agenda n° 40; Column 6: Social Agenda n° 41; Column 7: Social Agenda n° 42; Column 8: Social Agenda n° 43; Column 9: Social Agenda n° 44; Column 10: Social Agenda n° 45; Column 11: Social Agenda n° 46; Column 12: Social Agenda n° 47). Column 12 (Table 1-3) counts the total number of the results for each Social Agenda and Row 18 (Table 2), Row 19 (Table 3) and Row 23 (Table 4) identify the results for each item in each Social Agenda. Rows 1 and 2 of the Table 2, Table 3 and Table 4 select the Social Agenda and its research findings.

The further step of the research is to rank the various key terms (KT<sub>1</sub> to KT<sub>51</sub>) from “High ranking” to “Low ranking”.

The research assigns four categories for the research of the Social Agendas in the period October 2014-April 2017 as follows: (1) “High ranking” (higher than 300 results; orange highlighting of the results); (2) “Mid-high ranking” (between 200 and 299 results; green highlighting of the results); (3) “Medium ranking” (between 100 and 199 results; yellow highlighting of the results) and (4) “Low ranking” (between 1 and 99 results; blue highlighting of the results).

## Research findings

### Healthcare, social services and safety

The major finding of the Table 2 with regard to the thematic area of “healthcare, social services and safety” shows that the highly used key terms: “skills” (338 results); “market” (327 results); “labour” (393 results) and “employment” (640 results) determining the impact of the market conditions on the social policy. Overall, Table 2 makes two main key linkages about the impact of employment (640 results) and social affairs (132 results): *first*, the presence of key topic “labour” (393 results); “jobs” (116 results); health (171 results); “(un)employment” (206 results) leading to the EU social support and the government policies and *second*, the findings of: “social protection” (57 results); “working conditions” (41 results); “mobility” (67 results) and “safety (at work)” (87 results) enabling a comprehensive overview of the different sub-domains of the EU social policy.

**Table 2. Healthcare, social services and safety (variations of the key terms from Social Agenda n° 38 (October 2014) to Social Agenda n° 47 (April 2017))**

No	38	39	40	41	42	43	44	45	46	47	All KT Table 2
<i>Key terms</i>	2014 (10) *	2014 (12)*	2015 (04)*	2015 (07)*	2015 (10)*	2016 (02)*	2016 (06)*	2016 (09)*	2016 (12)*	2017 (04)*	
1.	79	10	10	2	10	18	8	18	7	9	171
2.	54	7	3	0	1	0	1	13	0	8	87
3.	16	19	10	13	8	14	12	13	12	15	132
4.	3	11	8	4	9	8	6	2	0	6	57
5.	12	29	35	35	43	41	43	24	36	29	327
6.	1	8	26	3	1	10	4	3	0	1	57
7.	0	6	2	7	0	2	1	18	5	4	45
8.	10	29	33	12	11	6	14	6	7	5	133
9.	58	63	64	69	73	59	64	39	77	74	640
10.	15	13	25	17	77	8	17	6	14	14	206
11.	9	5	1	1	5	1	2	11	2	4	41
12.	4	34	19	16	10	5	8	12	4	4	116
13.	7	36	29	40	9	10	35	129	13	30	338
14.	25	42	35	40	51	46	42	39	44	29	393
15.	8	13	6	8	6	2	3	7	4	10	67
Total	301	325	306	267	314	230	260	340	225	242	2810

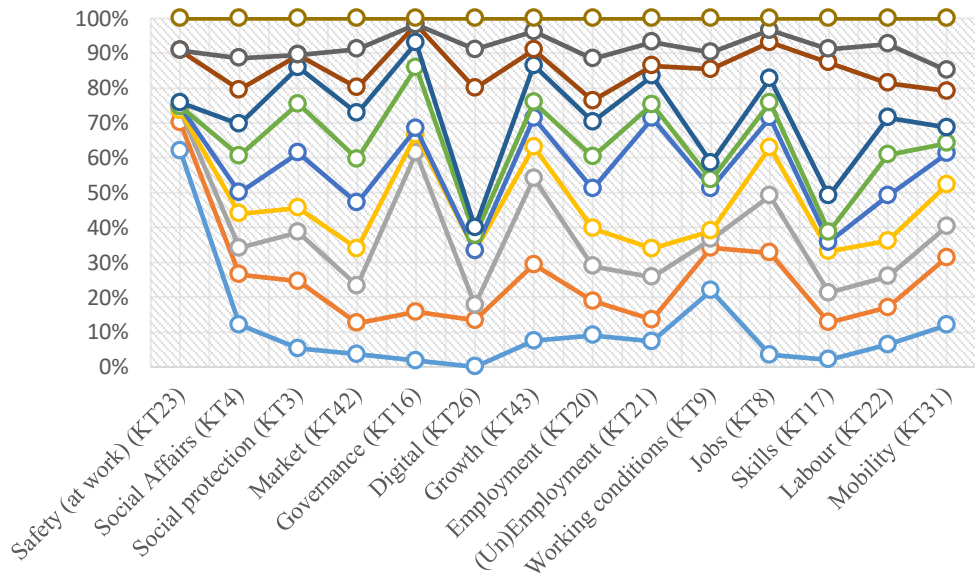
Source: Authors’ own compilation. Data retrieved according to the text of each Social Agenda: from Social Agenda n° 38 (October 2014) to Social Agenda n° 47 (April 2017). Note: Month (\*) = January (01); February (02); March (03); April (04); May (05); June (06); July (07); August (08); September (09); October (10); November (11); December (12).

Table 2 and Chart 1 make the case for the relevance of the ranking results such as: (1) “High ranking” terms (“market” (327 results); “employment” (640 results); “skills” (338 results); “labour” (393 results)); (2) “Mid-high ranking” terms (“unemployment” (206 results)); (3) “Medium ranking” terms (“health” (171 results); “social affairs” (132 results); “growth” (133 results); “jobs” (116 results)); and (4) “Low ranking” terms

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(“safety (at work) (87 results); “social protection” and “governance” (each 57 results); “working conditions” (41 results); mobility (67 results)).

**Chart 1. Healthcare, social services and safety (variations of the key terms from Social Agenda n° 38 (October 2014) to Social Agenda n° 47 (April 2017))**



Source: Authors' own compilation. Data retrieved according to the text of each Social Agenda: from Social Agenda n° 38 (October 2014) to Social Agenda n° 47 (April 2017). Note: Month (\*) = January (01); February (02); March (03); April (04); May (05); June (06); July (07); August (08); September (09); October (10); November (11); December (12).

### Social dialogue, social market and social entrepreneurship

Table 3 indicates the results of the monitoring of sixteen key terms emphasizing that the high-ranking key terms: “people” (667 results) and “youth” (302 results) focus the linkage between the social dialogue – the social market – the social entrepreneurship. The results of both key terms indicate the focus of the EU social policies at the level of the “youth” generation and “people”.

The results of Table 3 distinguish, however, between the varieties of the findings in the period 2014–2017: (i) for the “youth” research (26 results (Social Agenda n° 38, October 2014); 19 results (Social Agenda n° 39, December 2014); 31 results (Social Agenda n° 40, April 2015); 30 results (Social Agenda n° 41, July 2015); 47 results (Social Agenda n° 42, October 2015); 4 results (Social Agenda n° 43, February 2016); 14 results (Social Agenda n° 44, June 2014); 3 results (Social Agenda n° 45, September 2016); 93 results (Social Agenda n° 46, December 2016); 35 results (Social Agenda n° 47, April 2017); (ii) for the “people” research (51 results (Social Agenda n° 38, October 2014); 60 results (Social Agenda n° 39, December 2014); 44 results (Social Agenda n° 40, April 2015); 77 results (Social Agenda n° 41, July 2015); 80 results (Social Agenda n° 42, October 2015); 94 results (Social Agenda n° 43, February 2016); 46 results (Social Agenda n° 44, June 2014); 46 results (Social Agenda n° 45, September 2016); 87 results (Social Agenda n° 46, December 2016); 82 results (Social Agenda n° 47, April 2017)).

**Table 3. Social dialogue, social market and social entrepreneurship (variations of the key terms from Social Agenda n° 38 (October 2014) to Social Agenda n° 47 (April 2017))**

Key terms	No	38	39	40	41	42	43	44	45	46	47	All KT Table 3
		2014 (10) *	2014 (12)*	2015 (04)*	2015 (07)*	2015 (10)*	2016 (02)*	2016 (06)*	2016 (09)*	2016 (12)*	2017 (04)*	
1. Enterprise (KT <sub>46</sub> )		0	14	4	3	7	0	9	4	8	5	54
2. Investment (KT <sub>44</sub> )		9	56	24	19	12	4	9	7	4	20	164
3. Youth (KT)		26	19	31	30	47	4	14	3	93	35	302
4. Training (KT <sub>45</sub> )		11	19	19	92	21	6	29	45	29	20	291
5. Traineeship (KT <sub>19</sub> )		2	6	2	3	2	1	4	1	42	7	70
6. European Social Fund (ESF) (KT <sub>47</sub> )		15	13	10	7	9	4	9	10	7	24	108
7. Fund for European Aid to the Most Deprived (FEAD) (KT <sub>48</sub> )		3	0	2	0	0	2	4	4	5	0	20
8. Population (KT <sub>14</sub> )		6	1	0	0	8	7	5	2	2	4	35
9. Demographic (changes) (KT <sub>15</sub> )		7	1	2	1	1	8	0	1	0	0	21
10. People (KT <sub>13</sub> )		51	60	44	77	80	94	46	46	87	82	667
11. Citizens (KT <sub>24</sub> )		3	13	9	10	3	8	13	4	2	12	77
12. Member States (KT <sub>25</sub> )		27	16	22	6	21	18	16	15	26	35	202
13. Social Europe (KT <sub>10</sub> )		6	6	1	6	1	1	1	1	1	1	25
14. Innovation (KT <sub>33</sub> )		3	3	0	1	1	1	1	4	3	3	20
15. Social dimension (KT <sub>11</sub> )		5	3	1	0	1	0	3	0	1	7	21
16. Social dialogue (KT <sub>32</sub> )		5	13	35	2	2	0	5	5	0	3	70
Total		179	243	206	257	216	158	168	152	310	258	2147

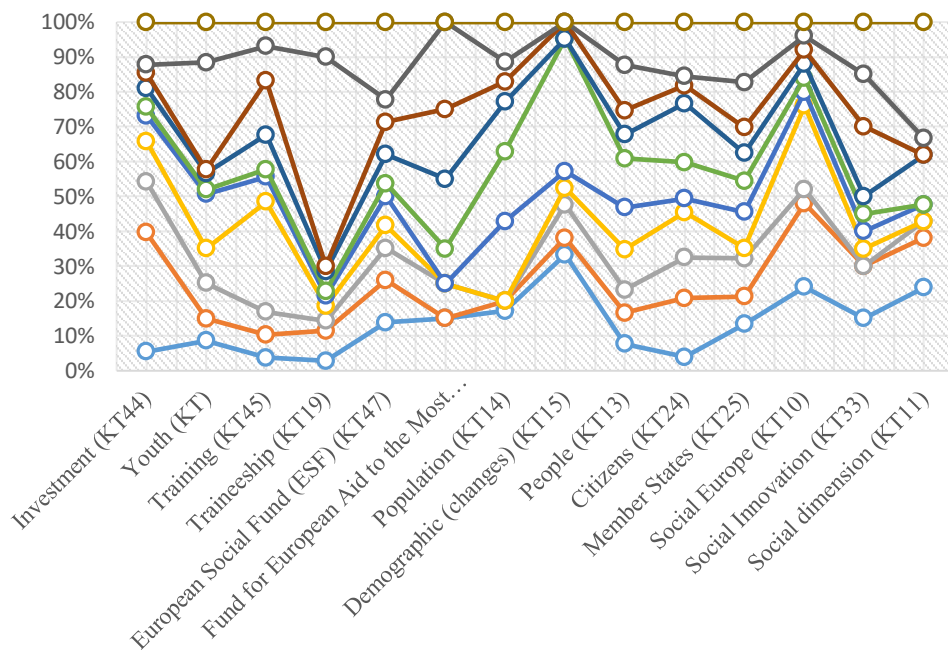
Source: Authors' own compilation. Data retrieved according to the text of each Social Agenda: from Social Agenda n° 38 (October 2014) to Social Agenda n° 47 (April 2017). Note: Month (\*) = January (01); February (02); March (03); April (04); May (05); June (06); July (07); August (08); September (09); October (10); November (11); December (12).

Table 3 and Chart 2 also emphasize the following ranking results: (1) “High ranking” terms (“people” (667 results); “youth” (302 results); (2) “Mid-high ranking” terms (“training” (291 results); “Member States” (202 results)); (3) “Medium ranking” (“investment” (164 results); “European Social Fund (ESF)” (108 results); and (4) “Low ranking” terms (“Fund for European Aid to the Most Deprived (FEAD)” (20 results); “social dialogue” (70 results); “social dimension” (21 results); “demographic (changes)” (21 results); “social Europe” (25 results); “population” (35 results); “enterprise” (54 results); “traineeship” (70 results); “citizens” (77 results)). Table 3 discusses the effect of the interaction between the social dialogue – social market – social entrepreneurship on the social dimension of the European governance. Column 3 to Column 12 present the

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results of the findings depending on the special features of each Social Agenda. The results suggest that the “Low ranking terms” (“Fund for European Aid to the Most Deprived (FEAD)”); “social dialogue”; “social dimension”; “demographic “social Europe””; “populations”; “enterprise”; “traineeship”; “citizens”) become statistically important in exploring the “High ranking terms” (“people” and “citizens”). From the results of Chart 2. Social dialogue, social market and social entrepreneurship, we can observe the effect of the increasing number of the key topics evaluated in the category “Low ranking terms” (62,5% from the total number of the key terms monitored in Table 3 and correlated with the “High ranking” terms (“people” (667 results); “youth” (302 results) (Column 13, Table 2).

**Chart 2. Social dialogue, social market and social entrepreneurship (variations of the key terms from the Social Agenda n° 38 (October 2014) to the Social Agenda n° 47 (April 2017))**



Source: Authors’ own compilation. Data retrieved according to the text of each Social Agendas: from Social Agenda n° 38 (October 2014) to Social Agenda n° 47 (April 2017). Note: Month (\*) = January (01); February (02); March (03); April (04); May (05); June (06); July (07); August (08); September (09); October (10); November (11); December (12).

### Human capital, migration and social policies

Table 4 and Chart 3 report the linkage between human capital – migration-social policies. The data indicate the frequency of twenty key terms ranging from 12 results (“parents”) and 21 results (“culture”) to 1113 results (“EU (European Union)”) and 1067 (“European”) (Table 4).

Table 4 presents the key terms usability and results ranging from three key terms in the category “High ranking terms” (EU (European Union) and European) to one result

in the category “Mid-high ranking terms” (“Social Agenda” (214 results) and “Medium ranking terms” (“workers” (186 results)).

Table 4 also reveals that in the period October 2014 – April 2017, more than 60 % of the key terms monitored were located in the “Low ranking terms” (“parents” (12 results); “cultural” (15 results); “family” (20 results); “EU funding” (22 results); “migration” (28 results); “social exclusion” (31 results); “cooperation” (38 results); “human capital” (39 results); “ageing” (48 results); “children” (48 results); “society” (88 results)).

**Table 4. Human capital, migration and social policy (variations of the key terms from the Social Agenda n° 38 (October 2014) to the Social Agenda n° 47 (April 2017))**

Key terms	No	38	39	40	41	42	43	44	45	46	47	All KT Table 4
		2014 (10) *	2014 (12)*	2015 (04)*	2015 (07)*	2015 (10)*	2016 (02)*	2016 (06)*	2016 (09)*	2016 (12)*	2017 (04)*	
1. Cooperation (KT <sub>41</sub> )		4	3	4	5	4	3	0	7	2	6	38
2. Social Agenda (KT <sub>34</sub> )		22	22	25	17	18	16	25	17	17	35	214
3. Ageing (workforce) (KT <sub>27</sub> )		3	8	0	4	1	19	2	6	2	3	48
4. Family (KT <sub>28</sub> )		3	4	2	1	2	3	4	0	1	0	20
5. Parents (KT <sub>29</sub> )		4	2	1	0	1	1	0	0	3	0	12
6. Children (KT <sub>30</sub> )		13	6	1	4	0	9	6	1	3	5	48
7. Human capital (KT <sub>35</sub> )		1	4	10	7	1	0	2	2	0	12	39
8. Workers (KT <sub>2</sub> )		45	12	12	8	10	27	40	18	2	12	186
9. EU (European Union) (KT <sub>6</sub> )		143	99	109	90	100	123	129	120	97	103	1113
10. European (KT <sub>12</sub> )		108	123	130	117	92	84	81	101	100	131	1067
11. Culture (KT <sub>39</sub> )		7	0	1	4	2	1	2	1	1	2	21
12. Cultural (KT <sub>40</sub> )		2	1	0	2	1	5	3	0	0	1	15
13. Education (KT <sub>38</sub> )		7	17	21	133	22	14	10	58	34	25	341
14. Reform (KT <sub>37</sub> )		9	8	24	9	11	22	4	2	21	7	117
15. Crisis (KT <sub>51</sub> )		21	13	40	7	9	10	10	2	7	14	133
16. Migration (KT <sub>36</sub> )		0	2	3	5	0	1	13	3	1	0	28
17. Poverty (KT <sub>50</sub> )		19	13	9	3	6	13	21	13	10	15	122
18. Social exclusion (KT <sub>49</sub> )		4	6	1	1	8	0	4	4	1	2	31
19. Society (KT <sub>5</sub> )		6	14	5	2	3	16	17	13	6	6	88
20. EU funding (KT <sub>7</sub> )		5	1	2	4	1	1	3	3	2	0	22
Total		426	358	400	423	292	368	376	371	310	379	3703

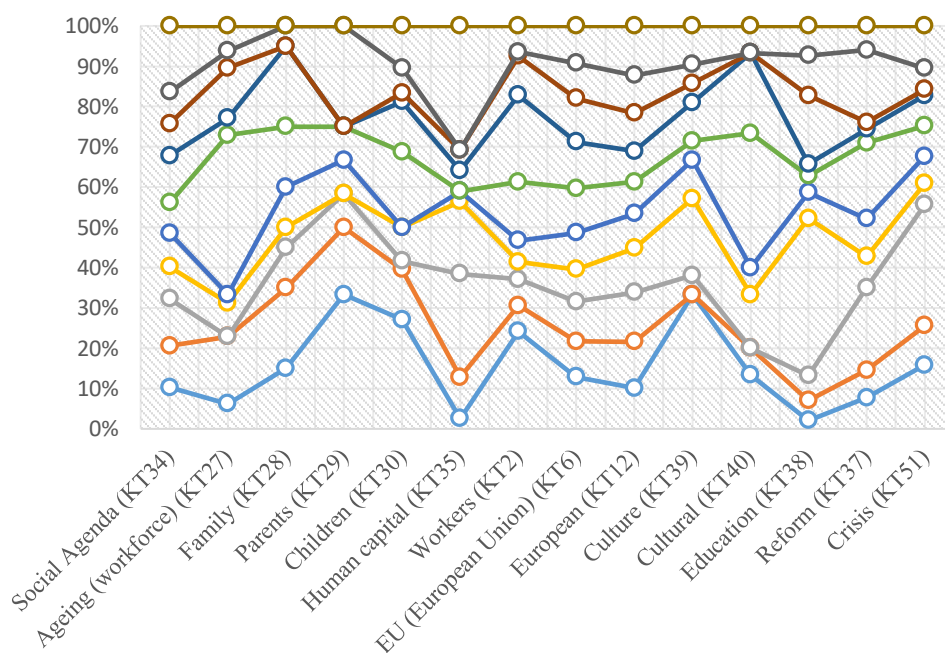
Source: Authors’ own compilation. Data retrieved according to the text of each Social Agendas: from Social Agenda n° 38 (October 2014) to Social Agenda n° 47 (April 2017). Note: Month (\*) = January (01); February (02); March (03); April (04); May (05); June (06); July (07); August (08); September (09); October (10); November (11); December (12).



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Table 4 and Chart 3 point a key element of the human capital-migration-social policy. The two high-ranking key terms (KT<sub>6</sub>: EU (European Union) (1113 results) and KT<sub>12</sub> (European) (1067 results)) emphasize the particular matrix of the institutional governance referring to two consolidated directions of the EU construction: (i) “human capital” (39 results) – “cooperation” (38 results) as means of dealing development and (ii) “human capital” (39 results) – “society” (88 results) – “reform” (117 results) as means of policy planning. Chart 3 also focuses on the “family” context as the nexus of encounter of three key terms (“family” (20 results), “parents” (12 results) and society (88 results)).

**Chart 3. Human capital, migration and social policy (variations of the key terms from the Social Agenda n° 38 (October 2014) to the Social Agenda n° 47 (April 2017))**



Source: Authors' own compilation. Data retrieved according to the text of each Social Agendas: from Social Agenda n° 38 (October 2014) to Social Agenda n° 47 (April 2017). Note: Month (\*) = January (01); February (02); March (03); April (04); May (05); June (06); July (07); August (08); September (09); October (10); November (11); December (12).

Table 4 combines all key terms indicating the variations of the results in the period 2014-2017 (data gathering all key terms). This generates a complex cycle between the “High ranking” key terms, the “Mid-high” ranking key terms, the “Medium” ranking key terms and the “Low” ranking key terms in each Social Agenda as follows: (1) Social Agenda n° 38, October 2014: “employment” (58 results, Table 2); “health” (79 results, Table 2); “people” (51 results, Table 3); “Member States” (27 results, Table 3); “EU (European Union)” (143 results, Table 4); “European” (108 results, Table 4); (2) Social Agenda n° 39, December 2014: “employment” (63 results, Table 2); “labour” (42 results, Table 2); “investment” (56 results, Table 3); “people” (60 results, Table 3); “EU (European Union)” (99 results, Table 4); “European” (123 results, Table 4); (3) Social Agenda n° 40, April 2015: “employment” (64 results, Table 2); “market” (35 results, Table 2); “skills” (29 results, Table 2); “people” (44 results, Table 3); “social dialogue” (35

results, Table 3); “EU (European Union)” (109 results, Table 4); “European” (130 results, Table 4); (4) Social Agenda n° 41, July 2015: “employment” (69 results, Table 2); “skills” (40 results, Table 2); “labour” (40 results, Table 2); “people” (77 results, Table 3); “training” (92 results, Table 3); “EU (European Union)” (90 results, Table 4); “European” (117 results, Table 4); (5) Social Agenda n° 42, October 2015: “employment” (73 results, Table 2); “market” (43 results, Table 2); “youth” (47 results, Table 3); “people” (80 results, Table 3); “EU (European Union)” (100 results, Table 4); “European” (92 results, Table 4); (6) Social Agenda n° 43, February 2016: “employment” (59 results, Table 2); “labour” (46 results, Table 2); “people” (94 results, Table 3); “Member States” (18 results, Table 3); “EU (European Union)” (123 results, Table 4); “European” (84 results, Table 4); (7) Social Agenda n° 44, June 2014: “employment” (64 results, Table 2); “skills” (35 results, Table 2); “people” (46 results, Table 3); “training” (29 results, Table 3); “EU (European Union)” (129 results, Table 4); “European” (81 results, Table 4); (8) Social Agenda n° 45, September 2016: “skills” (129 results, Table 2); “labour” (39 results, Table 2); “people” (46 results, Table 3); “training” (45 results, Table 3); “EU (European Union)” (120 results, Table 4); “European” (101 results, Table 4); (9) Social Agenda n° 46, December 2016: “employment” (77 results, Table 2); “skills” (3 results, Table 2); “market” (24 results, Table 2); “youth” (93 results, Table 3); “traineeship” (42 results, Table 3); “EU (European Union)” (97 results, Table 4); “European” (100 results, Table 4); (10) Social Agenda n° 47, April 2017: “employment” (74 results, Table 2); “market” (36 results, Table 2); “people” (82 results, Table 3); “youth” (35 results, Table 3); “EU (European Union)” (103 results, Table 4); “European” (131 results, Table 4).

### Conclusions

In conclusion, the research leads to a complex finding related to the efficiency of the EU social policies regarding the nexus population-human capital-inclusion.

The research also is helpful in exploring the positive focus on the high-ranking key terms such as: “people”, “citizens”, “EU (European Union)”, “European”, “employment”, “labour”, “skills”. These findings give an overview of how EU Social Agendas (2014-2017) manage the challenges of the linkage population-human capital-inclusion.

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ORIGINAL PAPER

## Great Romania under the Menace of the European Extremism and Revisionism

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**Abstract:**

In this article, there is presented the way in which the adversaries of Great Romania made efforts to fight for its dismemberment, immediately after 1918. The Great Union coincided with the revolution from 1917, and the reinvigoration of revisionism, due to the degree of permissiveness in the Peace Treaties from Paris-Versailles, 1919-1920. The actions meant to destabilise Romania were carried out both from the interior and exterior. There were subversive, violent actions, coordinated by the Soviet and German secret services.

Romania did not manage to have a position on the international plan for counteracting the effects of the German and Soviet proximity, which had been foreseen by the diplomat Nicolae Titulescu. In the 22 years, the period Great Romania resisted, there could be seen how complex the evolution of the internal and external politics was, promoted by the decisional factors from Bucharest. The conclusion is that the degradation of the international political system, the ascension of the revisionism, the lack of a coherent dialogue between the representatives of the Romanian political currents, the emerging and the evolution of the extremes represent the causes that led to the collapse of Great Romania, in the summer of 1940.

**Keywords:** *right extreme; left extreme; Germany; USSR; revisionism*

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## Great Romania under the Menace of the European Extremism and Revisionism

### Introduction

In the present article, there is to be presented the way in which the Great Union from 1918 was influenced by both the internal and external context. Undoubtedly, the strongest influence was that of the revolution from 1917, which took place in Russia, and changed the ratio of forces from the Eastern Europe, and determined Romania, along just a year-long period, to pass from the agony created by its disappearance as state, to the euphoria of the Great Union.

In historiography, there is the general perception that the Great Union from 1918 represented the result of the common fight of all the political forces from Romania. Although the Great Union was saluted and celebrated as the most significant event that put an end to the modern era of Romania, as a major success that would be experienced after centuries of aspirations on addressing the national unity and the independence, this significant event had numerous adversaries, which became noticeable during the following political evolution. Romania transformed into a middle-sized state, with a population of 18 million dwellers. Its natural resources and the agricultural production made Romania, during 1918-1920, a country that showed great potential. Nonetheless, Great Romania did not know how to consolidate its status, and how to advance on the way of the democracy. The responsibility of the failure cannot be attributed exclusively to the internal political background. Unquestionably, it played a determined part. But it ought not to be neglected the external context. It must not be forgotten that the spectre of extremism imposed itself in states with a richer democratic tradition than that of Romania. It is certain that a conflict occurred between the right and the left extreme was being orchestrated by Germany and USSR. The civil war from Spain is an extremely important example for this respect.

The system of Versailles had been “a Napoleonic peace with Wilsonian clauses”, as it was briefly put by Ionel Brătianu. This politician had imposed his will for the recognition of the historical rights and the Great Union (Moisuc, 2007:97). He resigned, as a protest against the fact that Romania was about to not be acknowledged as winning state, bringing forward reproaches on addressing the separate peace with the Central Powers from May 1918. Romania defended its point of view, the Great Union was acknowledged, but the problems did not stop there. It was needed, immediately after 1920, an active Romanian diplomacy and an equally responsible political class. The revisionism was born almost immediately after the Treaties from Paris-Versailles from 1919-1920. Furthermore, the extremist agitations sustained by Germany and USSR contributed to the erosion of the basis on which Great Romania had been founded, starting with 1921-1924.

Gradually, Germany escaped of the initially draconic conditions, but it assured its alliance with USSR, which had not been yet acknowledged. After 1933, although different as ideologies, Germany and USSR began a very close collaboration, especially military, owing to the fact that Germany had been forbidden the arming. USSR was looking for the right moment when it would enter the international arena, on the place that had been once occupied by the Tsarist Russia.

Generally, the historians and the political scientists have the tendency of omitting an essential element: the fact that the Great Union took place in the midst of the Russian civil war, unleashed after the success of the Bolshevik counter-revolution from the 25<sup>th</sup> of October/ 7<sup>th</sup> of November 1917. In the summer of 1917, Romania was heroically defending its severely affected national structure, yet, after the Soviet Russia had made

separate peace with the Central Powers in 1918, Romania, with the agreement of the collaborationist government led by Marghiloman and installed on the 5<sup>th</sup> of March 1918, realised, on the 27<sup>th</sup> of March/ 9<sup>th</sup> of April 1918, the union of Bessarabia with Romania, at that time reduced territorially to Moldova. On the 24<sup>th</sup> of April/ 7<sup>th</sup> of May 1918, Romania also concluded a separate peace treaty with the Central Powers, signed at Buftea/Bucharest, but never ratified by the Parliament from Iași, a peace annulled after the re-entering to the war, on the 10<sup>th</sup> of November 1918 (Neagoe, 2007: 441-446).

### **The War for National Reunion Revolution from 1917**

The year of 1917 was finding the Kingdom of Romania and the Russian Empire on the same side. Romania had sent the national thesaurus in the Tsarist Russia, whose dominating dynasty, that of the Romanov, was kindred to Queen Mary, the wife of King Ferdinand. Queen Mary was the niece of Queen Victoria, but also the first cousin of tsar Nicholas II. In April 1917, when the tsar had already abdicated and the Kerenski government had been installed, Romania was continuing sending certain parts from the thesaurus in Russia. The Kerenski government was carrying on fulfilling the obligations expressed by the tsar, to continue the war, but the Bolshevik revolts were also present. In April 1917, Lenin had arrived in Sankt Petersburg, presenting his well-known “Theses from April”, but they did not have the expected success and he had to seek refuge again, waiting and fuelling the dissatisfaction of the population on addressing the continuation of the war.

Thus, the Romanian-Russian cooperation on the eastern front was seen as a milestone for Romania’s surviving, on one side, and for the triumph of Lenin’s ideas, on the other side. Romania, through its Royal Court was seen as an enemy in 1917.

After the 25<sup>th</sup> of October/ 7<sup>th</sup> of November 1918, Vladimir Ilici Lenin sent to Iași, in Romania, one of his trustworthy men, Simion Grigorievici Roșal (Mitican, 1983:184,185), with the purpose of organising a base for a revolution, and to take the control over the Russian troops, that were to be made Bolshevik. S.G.Roșal was leading a group of 80 fighters that captured the military unit, quartered at Socola. There, Roșal planned, along with Christian Rakowski, an assault upon King Ferdinand. Moreover, with Rakowski, Mihail Gheorghiu Bujor, Ion Dissescu and Alecu Constantinescu were intending to form a Romanian Bolshevik government.

On the 22<sup>nd</sup> of December 1917, with the agreement of the Entente, and also that of the Central Powers, the Romanian troops entered in Bessarabia. The new declared Moldavian Democrat Republic, on the 2<sup>nd</sup> of December 1917, through its leadership, the Council of Directors, had asked the Romanian Army to interfere for avoiding the annexation to Ukraine (Poștarencu, 1998: 162-163).

At Iași, the negotiations between S.G. Roșal and general Dimitri Șerbacev, the commander of the Russian troops that were activating in Romania, carried out in Iamandi’s house from Copou quarter, on the 9<sup>th</sup> of December 1917, ended with the arresting of the Bolshevik by the Ukrainian guard, led by general Șerbacev. The Russian general asked for the support of the Romanian Army, and the Romanian prime minister, Ionel Brătianu, granted it. The Bolsheviks surrendered, without opposing any major resistance, and they were arrested, and later expelled, over Prut.

The Bolshevik government, on the 26<sup>th</sup> of January/ 8<sup>th</sup> of February 1918, ordered the confiscation of the thesaurus, and the ceasing of the diplomatic relationships with Romania. That meant the fact that Romania had, at the beginning of 1918, an external



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enemy, the Central Powers, but an internal one too, the former ally, Russia, which, at that moment, had its army in total disorder (Hobsbawm, 2003:99).

### **Negotiations and misunderstandings between the Kingdom of Romania and the Soviet Russia**

After Soviet Russia signed the Peace Treaty from Brest-Litovsk with the Central Powers and the preliminaries of the peace treaty with the Central Powers, from Buftea, that Romania signed on the 20<sup>th</sup> of February/ 5<sup>th</sup> of March 1918, the Russian troops left the Railway Station from Socola, on the 24<sup>th</sup> of February/ 9<sup>th</sup> of April 1918.

All these events determined the Bolsheviks to declare, on the 23<sup>rd</sup> of January/ 5<sup>th</sup> of February 1918, the state of war between Romania and the Autonomous Superior Council (RUMCEROD) from Odessa (the nearest city to Romania, controlled by the Bolsheviks) and to arrest the Romanians (civilians and soldiers) from the Odessa colony.

After the Peace Treaty from Brest-Litovsk, from the 3<sup>rd</sup> of March 1918, Romania was at the Central Powers' mercy. The Russian soldiers committed acts of indiscipline and even tried an intense Bolshevik propaganda in Moldova. In this context, general Alexandru Averescu also attempted an agreement with the Bolsheviks, a decision which might have been fatal for his career, equating with a betrayal. It is the infamous "Rakowski-Averescu Agreement", signed between the 20<sup>th</sup> of February/ 5<sup>th</sup> of March and the 23<sup>rd</sup> of February/ 8<sup>th</sup> of March 1918, considered to be an agreement between Romania and RUMCEROD from Odessa, signed by the Romanian prime minister and the ministry of the external affairs, general Alexandru Averescu and the RUMCEROD representative from Odessa, Dr. Christian Rakowski (Andone et al., 2013:222-225).

It has been speculated greatly on addressing this document, on the fact that it could be interpreted as a consent regarding the retreat of the Romanian troops, which, already in Bessarabia, on the 25<sup>th</sup> of January/ 7<sup>th</sup> of February 1918, had occupied Bender (Tighina), trying to cross the Dniester. Practically, General Alexandru Averescu would have promised the evacuation of Bessarabia, in two months (excepting 10 000 Romanian soldiers that would assure the guard of the Romanian storehouses and the security of railway transport), a fact that that was presented by I.G.Duca in his Memoires.

The politician I.G.Duca had been right, the Soviets denounced that Romania had infringed the agreement. General Alexandru Averescu had justified the signing of the document with the intention to avoid the conflict with the Central Powers, and Soviet Russia too, and "*the Romanian occupation from Bessarabia*" was taking it into consideration, from the tactical and military point of view, while the Soviets were regarding it as a political acceptance. The Soviets affirmed that the union of Bessarabia with Romania would have been influenced by the presence of the Romanian Army in Bessarabia, a fact strongly contested by the Romanian historiography that was declaring the State Council decided the Union, without the influence of the Romanian Army.

On the 27<sup>th</sup> of February/ 12<sup>th</sup> of March 1918, the RUMCEROD representatives from Odessa fled due to the entering of the Central Powers troops, according to the agreement from Brest-Litovsk, and the Romanians signed the preliminary agreement from Buftea with the Central Powers, on the 20<sup>th</sup> of February/ 5<sup>th</sup> of March 1918. The Moldavian Democratic Republic did not take part in this agreement, and this fact, owing to the circumstances (the fleeing of the Bolsheviks and the agreement of Romania with the Central Powers) became null by right (Otu, 2009:218).

Ionel Brătianu would use Constantin Argetoianu, who was thought to have advised Alexandru Averescu to sign the act, in order to determine Averescu to join

politics. The terms “*the retreat of the Romanian troops from Bessarabia*”, in two months, and “*Romanian occupation in Bessarabia*” would later constitute two faults registered in the military and political file of Averescu, with the possibility to send him before the Court Martial. General Averescu had enjoyed the unanimously acknowledged popularity on the battle field, and the necessary time, after 1918, to make the agrarian reform, could have been shortened, until PNL, led by Ionel Brătianu, would have removed the consequences that the war had generated on the party’s popularity.

The incidents from Socola and the “Averescu-Rakowski Agreement” did not represent the only challenging moment during 1918, the year of the Great Union.

### **The influence of the internal and international political background, on the evolution of Great Romania**

The socialists from Romania were protesting against the difficulties generated by war, a war which they had condemned previously, even if it had been fought for the reunion of Romania. On the 13<sup>th</sup> of December 1918 there had been several strikes in Bucharest, amongst them, being remarked the strike of the typographers, for better working conditions, and for the obtaining of rights through legislative regulations. One of the marking leaders of the party, was the activist I.C.Frimu. In December 1918, PSDR transformed into the Romanian Socialist Party.

In Hungary, the collapse of the dualist monarchy led the country on the threshold of a revolution. The Bolshevik agitators had managed, taking advantage of the anarchy caused by the Austro-Hungarian collapse, to create a coup d'etat, which had as a consequence the proclamation of the Republic of Councils from Budapest, and Bela Kun became the ministry of the external affairs, and Garbai Sandor became the leader of Hungary, on the 21<sup>st</sup> of March 1919, Mihaly Karoly and Berenkey Denes being removed from the positions of president and, respectively, premier.

It is obvious that, for the Hungarian communists, the union of Transylvania with Romania was not one of the point they would agree with. Banat was occupied by the French, and had proclaimed its independence, most of it becoming Romanian in August 1919, while another part had been attached to Hungary, and a significant one to Serbia.

The former Austro-Hungarian armies were supposed to retreat progressively, according to a line of demarcation on the river Mureş, positioned by the French general Franchet D’Esperey, internationally regulated until the signing of the peace treaty with Hungary. The Bolshevik government from Budapest was encouraging unjustified delays in the retreating pace of the troops from over Tisza. On the 24<sup>th</sup> of June 1919, a coup d’etat, planned by Antal Dovcsak, introduced “the red terror”. The Romanian troops, with the expressed agreement of the Entente, stopped the Hungarian attack on the 25<sup>th</sup> of July 1919, and counter-attacked, occupying Budapest, and, later, overthrown the Bolshevik government, on the 6<sup>th</sup> of August 1919. The Treaty of Trianon from the 4<sup>th</sup> of June 1920 would definitely sanction the union of Transylvania with Romania (Kirijescu, 1923: 238).

In a previous article I have mentioned that the socialist movement in Romania had a relatively short and eventful existence. Disadvantaged by the electoral legislation, unpopular due to the connections with the socialists and the communists from Russia, the Romanian socialist movement seemed advantaged by the transformations that had occurred in the Soviet Russia.

On the 28<sup>th</sup> of October 1920, there was signed “The Protocol of Bessarabia”, but USA did not ratify the Treaties from Paris Versailles, and Japan did not sign the protocol.

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Practically, the regulation of the Romanian-Soviet frontier was the responsibility of the two states, in a later stage, after they had re-established the diplomatic relations.

On the 8<sup>th</sup> of May 1921, in Romania, there was found the Romanian Communist Party, a branch of the Third Communist International. The Bolshevik activists, as Christian Rakowski and Lev Trotsky, had come in Romania and had tried to identify the possibility to extend “the export of revolution”. At Moscow, Nikolai Ivanovici Buharin had already expressed, in rude in unrealistic terms, his opinion about Romania, which he was considering “*the dungeon of the peoples*” and “*the creation of the imperialist circles*” from the Occident. We might justly wonder: what determined the Soviet communists to see an enemy in Romania, and, implicitly, a target for the “extension” of the revolution?

In 1924, PCdR was banned, due to the agitations that were attempting to dismember Romania, agitations occurred in Bessarabia, and also in Quadrilateral. The communist activists were told to cause damages, especially in the infrastructure.

Naturally, there emerges the following question: why did Romania, during the inter-war period, estranged from its traditional allies, France and England? Paradoxically, these powers showed little interest in maintaining good diplomatic relations with Romania. In 1921 and 1934, Romania had created the Little Entente and the Balkan Agreement, two regional alliances, which, nonetheless, did not enjoy the effective support of the great powers. Revisionism had thrived in Europe, with the help of Germany and USSR, and Italy, former winning power, was dissatisfied with the Treaties from Paris-Versailles. Bulgaria, Hungary, and even Poland, had certain dissatisfactions, related to the frontiers of the neighbouring states, a situation that led to the ascension of the revisionism. The publishing, in 1926, of “Mein Kampf”, the book-programme of Adolf Hitler, was demonstrating that Germany wanted to obtain “the vital space”, and, for it, the state was encouraging other states too, to fight for the revision of the treaties. On the other side, USSR, founded in 1922, after Stalin had taken the political control, continued to encourage the Bolshevik agitations. Stalin had adopted the “communism in one country” thesis, but he did not know that the communist agitations could weaken those states. The Great Recession from 1929-1933 contributed greatly to the degradation of the European and world political situation, which led to the collapse of the world and stock market. Unemployment was ravaging, the factories were closing, and people were going on strike in all the European states. The extremist political currents that were militating for “the new order”, both on the right and the left of the political spectre, were very popular in many of the European states, with great opportunities to take the leadership, and sometimes even succeeding in it.

Romania was surrounded by revisionist neighbours: USSR, Bulgaria, Hungary, which were waiting for the appropriate moment. USSR was continuing to support the agitators from Bessarabia and the Quadrilateral.

In Bessarabia, the Soviet propaganda had an intensive character. For NKVD, the informative and subversive operations could be more easily performed, owing to the fact that the population was speaking Russian, and had connections with the Russian space. Yet, the Romanian population did not become involved in these actions, supporting the Romanian administration. During the treaties from Vienna, between the Romanians and the Soviets, in 1924, the Soviets asked for a plebiscite in Bessarabia, invoking the fact mentioned before, that of the union between Bessarabia and Romania, realised through the presence of the Romanian Army. The Soviets were invoking the agreement between Rakowski and Averescu too, which led to the suspending of the negotiations, on the 2<sup>nd</sup> of April 1924 (Muşat&Ardeleanu, 1986:1037-1038).

The Soviets wanted to take subversive actions in the Southern Bessarabia. The agitators started to cross the Nile by boat, and to attack the frontier guards' posts. The leader of these actions was the Soviet commissary Andrei Kliușnikov, called "Nenin", also helped by Iustin Batiscev. There was founded a revolutionary committee that initiated actions of destruction of the phone lines, of plundering, crimes against the local authorities from Tatar Bunar, in September 1924. Similar incidents took place in Galilevca, Nerușai, Cișmele. On the 12<sup>th</sup> of October 1924, USSR founded, on the left bank of Dniester, in the Soviet Ukraine, the Autonomous Soviet Socialist Republic of Moldavia, to use it as a future basis for its actions. Until 1925, at Chișinău, there was judged the "Process of the 500", against the authors and the participants to the rebellion from Tatar Bunar. There were sentenced 85 participants, Iustin Batiscev being sentenced to life hard labour, while the rest received sentences starting from six months, two years, six years, and going to 15 years of prison. Practically, from the 85 convicted, in this political trial, none was of Romanian origin.

The Quadrilateral, that is the south of Dobruja, the inter-war counties of Durostor and Caliacra, was considered, by the Bulgarians, as the cradle of "the Slavic-Bulgarian state", a significant centre in the fight of Bulgaria for independence. The fact that Dobruja was given to Romania, in 1878, caused dissatisfaction amongst the circles in Sofia, and the promising that Romania would get territorial compensations in the south of Dobruja, after the lost of Southern Bessarabia, caused agitation. In the Romanian Dobruja, there had been living many Bulgarians, at Tulcea being a "Leading and Propaganda Committee" (Tonev, 1962: 18). This committee later moved to Bazargic, in the Quadrilateral, before being taken, in 1913, by Romania, after the peace treaty from Bucharest. In that context, Mihai Moruzov, the founder of the Romanian secret service from the contemporary era, began his activity of secret agent.

After 1913, the Bulgarians from the Quadrilateral, most of the left side intellectuals, founded "Dobruja Society". The World War I was the moment when the Bulgarian propaganda became more intensive. On the 7<sup>th</sup> of January 1918, 286 Bulgarians from Dobruja requested the Central Powers, in a memoir, attributed to "Dobruja Central Committee", the acknowledgement of the so-called historical rights of Bulgaria, on Dobruja. On the 7<sup>th</sup> of May 1918, the Quadrilateral and the territory from the south of Constanța would become Bulgarian, while the Central Powers would occupy Dobruja, and Romania had access to the Sea, on a commercial road. Constanța would become a free city, and Bucharest-Cernavodă-Constanța railway, and the silos from the Port of Constanța, would be given to Germany.

The defeating of Bulgaria enhanced the discontentment that led to radicalization. The communist propaganda, supported by doctor Christian Rakowski, made the Bulgarian Bolsheviks talk about the "state from Dobruja". Although Bulgaria signed the armistice from the 29<sup>th</sup> of September 1918, the retreat of the Bulgarians from Dobruja was completed on the 23<sup>rd</sup> of December 1918, from the last region, Caliacra. NKVD and GRU, the two components of the Soviet espionage, decided they could support a lot of the subversive actions, generically called "popular insurrections", agitations that would destabilise the Quadrilateral. Thus, the so-called "komitadji", organised as groups that were informatively coordinated, according to tactics specific to the guerilla troops. The "komitadji" would attack the Romanian authorities, the frontiers guards' posts, and even the Romanian military units. The Soviets founded a section of espionage and agitation in the Balkans, called "Zacordat". On the territory of Dobruja, there were two subversive organisations that were acting, called DRO-The Revolutionary Organisation from

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Dobruja (whose beginning can be traced after 1878), and V.D.R.O.-The Internal Revolutionary Organisation from Dobruja, founded in 1925 (Roman, 1935:17-21).

The fact that PCdR had been outlawed, on the 11<sup>th</sup> of April 1924, accentuated the turbulences, and the ascension of the right extreme was determining the increase of menaces, on addressing the integrity of Romania. The relation with USSR was practically neglected, until 1934, although, in 1924, at Vienna, there had been carried out negotiations. Romania waited for USSR to tighten its relations with France, Great Britain, and, this way, USSR would join the Society of Nations, which Germany would abandon in 1935, introducing the mandatory military service.

In the 1930s, the numerous Bulgarian komitadji escaped the Stalinist purges, seeking refuge in Romania. We mention here Jordan Dragan Rusev (Petar Borilov or Petre Borilă, the future in-law of Nicolae Ceaușescu), Dimitar Ganev, Ghiorgghi Crosnev. Boris Ștefanov an influential Bulgarian activist, a good friend of Alexandru Iliescu, the father of the former president Ion Iliescu. Alexandru Iliescu managed to escape the Stalinist purges, being noticed as an efficient contact person of the Bulgarian komitadji, from DRO.

In 1928, there took place the 4<sup>th</sup> Congress of PCdR, and “Lupta de clasă” newspaper, from September-December 1928 was writing that, among the decisions made by the congress, there was adopted the one of “self-determination and nationalities from Romania” (Scorpan, 1997: 131).

In Romania, the anti-Russian feeling had reappeared as intense as after 1878, due to the behaviour the Bolshevik Russian soldiers had on the front line. The liquidation of Romanov dynasty in the Soviet Russia produced a strong impression at Bucharest. We should bear in mind that Queen Mary of Romania was first cousin with Tsar Nicholas II, executed by the Bolsheviks at Ekaterinburg. Moreover, after the union of Bessarabia, Bukovina, Banat, Crișana, Maramureș, Transylvania with Romania, at Bucharest, there was constituted a new political class. They were politicians, extremely active in the fight for the right of the Romanians from the occupied provinces, who, at that moment, needed to build a new society, to accomplish the institutional, political, administrative, economic and social union of Romania. Moreover, there were huge differences of infrastructure, and even mentality. The populations, once privileged, were now the minority, and the country needed laws to integrate them into the political, social and economic life of Romania.

Furthermore, the politicians from Transylvania, Bukovina, Banat, or Bessarabia were sometimes regarded with certain reservations by their Wallachian colleagues, owing to the fact that they would become competitors in the political act. The Conservative Party disappeared in 1922, and the void it left on the political stage, would have never been practically filled, and no other new emerged party succeeded in dealing with the entire range that it had been specialised in.

The agrarian reform from 1924, and the Constitution from 1923 tried to offer the background for the later development of Romania. Yet, the adhesion of the peasants and workers to the communist movement was rather reduced after 1924, although, on the occasion of the strikes from Grivița, the Romanian communists were rather vocal, a proof of that being the political processes after 1933, and the prisons from Caransebeș, Doftana, Târgu-Jiu, where there were taken the arrested communists.

Practically, in Great Romania, the adhesion of the peasants and workers to the communist movement was more reduced than the adhesion of a lot of students (in theology, law, education), clerks, priests, but also workers, or peasants to the Iron-Guardist Movement, founded by Corneliu Zelea Codreanu. The right extreme from Romania had the advantage of being supported by notorious people, such as A.C.Cuza,

## Florin NACU

Nicolae Iorga, Octavian Goga, whereas the communist movement did not have highly educated leaders, and the dependence of the communists on Moscow was more evident than the dependence of the right extreme on Berlin. The communists were promoting the proletarian internationalism, which meant even the dismembering of the Romanian state, while the right extreme was talking, in its propaganda, of nation, religion, state and individual, which was perceived as being much more attractive, but which was hiding an anti-Semitic rhetoric, later become viral, which was trying to subordinate Romania, economically and politically, to the German interest (Constantiniu, 2011: 341). If the communist movement was declared illegal, in 1924, the Romanian right extreme resisted to the many attempts of banning it, in 1923, in 1938-1939, the last being in January 1941. The right extreme was noticed inclusively through violent actions, against the political adversaries, and even those who had decided to leave the organisation, which led to the diminishing in popularity. The ascendancy of right extreme was due to the approaching to Christian values, especially important in the rural regions, while the communists were promoting the atheism.

Germany, wishing to please Soviet Union, Hungary and Bulgaria, agreed, in 1940, on cutting Great Romania in parts, which the right extreme accepted, because they wanted to enjoy the support of Germany.

In Bulgaria, besides the communist revolutionary committees, the right extreme was also extremely active. The Bulgarian “Komitadji” were initiating actions that would weaken the civil and military administration from the Quadrilateral. After the loss of southern Dobruja, in 1940, of Bessarabia and Northern Bucovina, in the same year, the communist agitators grouped more actively in Romania, but they could not act too easily, because of the dictatorship of Antonescu and the Iron-Guard, and Antonescu. Yet, the revisionist behaviours of Hungary and Bulgaria was neglected inexplicably. Might it have been due to the fact that the Romanian politicians, led by the King Carol II, thought that the Versailles system would be defended?

Not only the external climate was unfavourable for Romania. After 1927, the year when the prime minister, Ionel Brătianu, died, Romania became a stage for the fight over power. The Regent Prince, Nicolae, who was ruling instead of his minor nephew, Mihai I, who became a king when he was just 6 years old, and the Regency, assisted to the repositioning of the political parties. PNL, and the newly found PNT, along with the other smaller, but with greater ambitions parties, had an attitude that contributed to the erosion of democracy.

The ascending on the throne, on the 8<sup>th</sup> of June 1930, of King Carol II, returned from the exile, after dethroning his son Mihai, was the first step towards the destruction of the democracy, and the erosion of Romania’s prestige. Carol II was intending the establishment of a regime of authority, built around himself, with only one party, with a devoted government, and a permissive constitution.

The diplomatic Romanian-Soviet relations were to be revived in 1934. In 1936, the treaties from Montreux, between Maksim Litvinov and Nicolae Titulescu were failing. The Romanian diplomat had tried to introduce the Dniester as line of demarcation between the Romanian and the Soviet army, which could be equated to the acknowledgement of the frontier between the two states.

In August 1936, Nicolae Titulescu was reshuffled, King Carol preferring Victor Antonescu for the Ministry of the External Affairs. USSR, which did not wish the continuation of the Litvinov-Titulescu treaties found the pretext, after the dismissal of Nicolae Titulescu, to consider that the attitude of Romania meant the end of the treaties,

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on addressing the establishing of the Romanian-Soviet frontier. Nicolae Titulescu said that the Soviet-German relation would be a reality, and that the purposes of this connection would be unfavourable for the superior interests of Romania.

Gradually, after 1936, there occurred a closed relation of Romania and Germany, a fact that would have been inconceivable in the first years of the inter-war period. The relation with Germany was much more obvious than the relations with the Soviet Union.

King Carol II achieved his goal, on the 11<sup>th</sup> of February 1938, instituting the authoritarian monarchy. King Carol II positioned himself against the right extreme, even if he had initially wanted to subordinate it to his intentions. Great Romania was getting closer to the collapse from the tragic summer of 1940.

### **Conclusions**

Great Romania was a geopolitical reality at the end of 1918, although this year did not start, for Romania, under the most favourable auspices. Although Romania had conquered, on the battle fields from Mărăști, Mărășești and Oituz, the right to its existence as state, it was trapped. In front of it, there was the enemy represented by the Central Powers, and behind, there was the ally, Russia, which rapidly became potential enemy, and then the effective enemy.

Both Soviet Russia and Romania had to conclude separate treaties of peace with the Central Powers. Yet, Romania re-entered the war and managed to impose its point of view, at the Peace Treaties from Paris-Versailles, as winning power, and to be acknowledged, not without emotions, the acts of union from 1918. Thus, the question of Bessarabia was to be tackled through the Romanian-Soviet bilateral cooperation, after the states would have begun again their diplomatic relations, interrupted in 1918.

In Great Romania, the political debate overpassed the background of the modern age. There occurred a constitutional transformation of the legislation, in all the areas, yet, unfortunately, the politicians of the era did not understand the fact that they needed to cooperate, and to think beyond the regional differences.

Romania became, through the union, Great Romania, but it was the unification that created the most serious problems. Great Romania did not manage to become an integrated part of a system of alliances with the Great Powers. The Romanian diplomacy preferred to remain faithful to the commitments from Paris-Versailles, when the signers of the treaties preferred to accept their infringement, and even their revision.

The Romanian authorities met numerous political problems in Bessarabia and the Quadrilateral, caused by the subversive actions, orchestrated by the Soviet Union. Yet, these realities did not manage to influence the political factors of decision from Bucharest, in order to take measures for the strengthening of the Romanian international diplomacy.

Great Romania faced the spectre of totalitarianism, right and left extremism, but it also experienced the democratic form of government. The Great Depression and the erosion of the democracies, in states with tradition in this respect, also contributed to the revival of revisionism, whose victim Romania was in 1940.

Bessarabia, Northern Bukovina, Hertsa, the Quadrilateral, the North-West of Transylvania were taken, Romania losing approximately a third of the territory, and a quarter of the population. Great Romania was, undoubtedly, the most significant achievement of our generation of politicians, from the modern era. Unfortunately, in the complicated international context from the inter-war period, and due to the internal political dissensions, the Romanian politicians that came after the generation that had achieved the Great Union, and even the politicians who had achieve it, did not manage to

consolidate Great Romania, or to keep its territorial integrity, in the 22 years that passed, between 1918 and 1940.

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## ORIGINAL PAPER

# The Globalization Debate. From “The great Voyages of Discovery” to Post Communism

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### Abstract

For the past decades, globalization has been a hot topic in the international discourse, identified both as a process and a phenomenon. Specialized literature hosts an ongoing debate related to the moment that can be identified as the beginning of what we call “globalization”. But is it possible to identify one single moment in history from when globalization started? In this paper we aim to present the different points of view argued by scientists, and use historical moments that mark the building of relations among states on a global scale, to explain how different parts of the world came to be interconnected at the unprecedented level they are today. Also, we intend to argue in which way the end of the communist regimes in Eastern Europe has influenced the spreading of global links among states.

**Keywords:** *Globalization, international relations, history, Eastern Europe, communism*

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### **Conceptual determinations**

Several issues mark the world we live in, making current times into what will soon be history. Among these, international migration, world commerce, the issues regarding human rights, common international security threats or environmental challenges can be recalled as defining topics for the XXI<sup>st</sup> century's societies. Further research on any of these topics leads to a common ground, represented by the deep interconnections provided by globalization, as they are not anymore individually undertaken by the nation-states, but by the humankind.

The word "globalization" appeared for the first time in the Webster Dictionary in 1961, defining "the beginning of an explicit recognition of the growing signification of the global connection between events and social relations in the contemporary period" (Kilminster, 1997: 257). The use of the term became more and more regular, being used as a common explanation for the evolution of social relations, political and economic developments, being described by authors such as Held as "the cliché of our days: a great idea comprising everything from starting from the global financial markets to the internet, but that offers little understanding on the contemporary human condition" (Held, McGrew, Goldblatt, Perraton, 1999: 1).

A "phenomenon and a system as well" (Porumbescu, 2008: 239), globalization has been defined in many ways, depending on the perspective of the specialist trying to explain it and use it in a further argumentation. As a phenomenon, it manifests itself by a rapid growth of economic, social and technological changes, represented by the deepening of the connections among states and different parts of the planet. It is also regarded as a historic process in which the state or the national institutions, the authorities, actors and others, are more and more left behind by the global interactions, especially in the economic matters (Lawson, 2010: 153).

The globalization phenomenon, as well as regionalization, has often been recalled as the main transformation factor for the political and economic relations in the contemporary world. Much like a force that transcends the concept "international", based on its classic grounds related to the national-state (as established since Westphalia, 1648), globalization is regarded as an "element that undermines the traditional sovereign state, deleting the importance of frontiers and the power of governments in a Post-Cold War era" dominated by the ever winning capitalism (Lawson, 2010: 32).

Since it was first used, the concept "globalization" became integrated in various field studies, being either an explanation or a consequence of the specific evolutions in said fields (Robinson, 2007: 125). One of the main focus points was the emergence of a globalized economy, which implied the use of new financial tools, new systems of production, wider consumption; another one was the spread of new cultural patterns, thus building on the idea of "global culture(s)". The third one, as some authors argue, consists in the rise of new political processes, the consolidation of democratic regimes, international institutions and organizations, including in the international vocabulary the use of terms such as "global governance". A fourth point of interest was the "unprecedented multidirectional movement of peoples around the world involving new patterns of transnational migration" (Robinson, 2007: 125), thus creating new identities and new types of communities. The fifth domain in which globalization, as a phenomenon, acted was that of the social relations, leading to the creation of new hierarchy.

Globalization is, without doubt, one of the key concepts of the twenty first century's discourse, but it is also one of the most argued and debated. Being given the

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topic of this paper, as well as the space constraints, we will not engage in an epistemological debate on the various determinations of this concept, but will rather engage in discussing the political and normative dimensions of the debate on globalization, referring to the distinct theoretical discourses and timely evolutions in the field. However, it is very difficult to approach globalization without taking into account the conflictive nature of this process.

Maurice Vaisse’s Dictionary of international relations (Vaisse, 2008: 142) defines the term by the global character of certain phenomena, thus calling for the existence of an international authority to find a solution. In building a definition, the concept of “ladder economy” is also being used, as well as the idea that once the Cold War had come to an end, and the bipolar world is gone, the economic liberalism and democracy triumphed and spread across the planet. This is precisely the idea on which we intend to build our argument, scrutinizing the ways in which the fall of the communist regimes in Eastern Europe has impacted the spreading of global ties among countries. Of course, other types of international exchanges are not to be left apart, such as culture, information, technology, turning the world into McLuhan’s “global village” (McLuhan, 1964: 6).

It is not without importance the fact that the bibliographical research on globalization reveals that, however, in various studies, globalization is often associated with expanding worldwide inequalities, new modes of exploitation and domination, displacement, marginalization, ecological holocaust and anti-globalization. As Ritzer argues, “others have trumpeted the process as creating newfound prosperity, freedom, emancipation and democracy” (Ritzer, 2008: 126). But some still choose to highlight the negative outcomes of this deep process of interconnecting world markets, economies and societies. Furthermore, regarding the cultural evolution in different regions of the planet, as well as the evolution of traditional concepts, such as national identity, state sovereignty, or national history, globalization is more often associated with a severely negative, deteriorating influence, as it is assumed to bring along the erase of differences, as a consequence of the spread of globally accepted models and patterns.

Therefore, we can conclude that the nature of the concept of globalization is hard to capture in one commonly accepted definition, taking into account all the different formulated and angled claims that surround this concept in the specialized literature.

### **Theories on the start of globalization**

Being given the disputed nature of the concept of “globalization”, it is in the hands of the scholars from each field of study to try and explain it using specific tools. However, taking into account that this process is not generated by only one aspect of human activity, nor does it have effects on just one, we believe it is best to be approached in an interdisciplinary manner. The study of bibliography on this topic leads to reveals the fact that “the traditional borders between disciplines have become blurred in both theories and empirical studies on globalization” (Robinson, 2007: 128).

In order to succeed in this approach, a historical framing of this process is required. Many of the studies on globalization available in the scientific community start from a common inquiry, trying to identify the historical moment when globalization actually began. While some simply present several alternatives, there are also some scholars that try to argue for one or another moment. In the first category we can include William Robinson, who states that “the rise of globalization studies has served to reassert the centrality of historical analysis and the ongoing reconfiguration of time and space to any understanding of human affairs”. Furthermore, he argues that the way in which we

understand the beginning of this process impacts on the very nature of it, shaping the approach on the concept that is to be used in a study. In supporting his opinion, he introduces the three broad approaches most frequently used: “In the first, it is a process that has been going on since the dawn of history, hence a 5,000–10,000 year time frame. In the second, it is a process coterminous with the spread and development of capitalism and modernity, hence a 500 year frame. In the third, it is a recent phenomenon associated with such processes of post-industrialization, post modernization or the restructuring of capitalism, hence a 20–30 year frame” (Robinson, 2007: 127).

In the other category, Immanuel Wallerstein, among others, believes that “(i)t was in the sixteenth century that there came to be a European world-economy based upon the capitalist mode of production” (Wallerstein, 1974: 67). He also believes that several parts of the world (India, Russia, the Ottoman Empire and West Africa) only became incorporated into this world economy at some point between 1750 and 1850, as the trade in luxury goods which had linked these regions to the core was replaced by trade in bulk goods (Wallerstein, 1989, Chapter 3). In other words, one of the most important ideas that Wallerstein is promoting in his work is that “the current global system polarization stems from the gap between central and peripheral regions” (Ilie, 2014: 232).

However, some of the world historians have gone much further. They argue that “globalization is a phenomenon which stretches back several centuries, or even several millennia”. For instance, according to Andre Gunder Frank, “there was a single global world economy with a worldwide division of labor and multilateral trade from 1500 onward” (Frank, 1998: 52), while Jerry Bentley argues that even before 1500, “trade networks reached almost all regions of Eurasia and sub-Saharan Africa and large volumes of commerce encouraged specialization of agricultural and industrial production” (Bentley, 1998: 242).

As pointed out earlier, many historians identify the starting point of the globalization process in the events that occurred in 1492, when “Christopher Columbus stumbles on the Americas in search of spices” and 1498, when “Vasco da Gama makes an end run around Africa and snatches monopoly rents away from the Arab and Venetian spice traders” (O’Rourke and Williamson, 2002: 23), referring to the period after 1500 as inaugurating “a genuinely global epoch of world history” (Bentley, 1996: 768-9). According to Adam Smith, cited in numerous works approaching this topic, these were “the two most important events in recorded history” (Tracy, 1990: 3).

Charles Tilly, in his work entitled *European Revolution*, also points out that the end of the XV<sup>th</sup> century was a time of high significance in the history of Europe and the world. Columbus’s expeditions in 1492 were the beginning of placing the Americas under European influence. This expansion was merely a part of Europe’s successful road onto becoming the economic center of the world. Before this, empires had flourished and collapsed in the geographical territory of Europe, especially in the Mediterranean and Black Sea area, but only the Roman Empire has managed to bring together half of Europe, embedding it into the Eurasian commerce, politics and culture system.

Also, as William H. McNeill states, “the year 1500 marks an important turning point in world history ... The European discoveries made the oceans of the earth into highways for their commerce ...” (McNeill, 1999: 295). When referring to the globalization phenomenon as explained in economic facts and terms, Andre Gunder Frank makes a significant remark: “[T]here was a single global world economy with a worldwide division of labor and multilateral trade from 1500 onward” (Frank, 1998: 52). Of course,

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the global economy he was writing about was far from being alike the one we experience nowadays, but one cannot dispute that the routes of modern capitalism were being set.

Later on, the year 1648 also marked a turning point, especially from the perspective of relations among states: the Westphalia Treaty crystalized the shape of the European international society and its dominant entities, which later on used their power and influence to rebuild the global system following their own model (Buzan, Little, 2009: 416).

While most of the scholars study the events from a historical and rather objective point of view, emphasizing on the facts rather than the social and political consequences, pessimists argued that globalization was boxing the world into a ‘global trap’, increasing inequality and undermining the ability of the state to deal with pressing social problems (Martin and Schumann, 1997: 32). Other scholars, such as O’Rourke and Williamson, use economic criteria to measure the influence of globalization. They claim that in order „for globalization to have an independent influence on an economy, two conditions must be fulfilled (...) trade-creating forces must change domestic commodity prices”, and „ the changes in domestic commodity prices must induce a reshuffling of resources in order for trade to influence the things that really matter” (O’Rourke and Williamson, 2002: 26). While not disregarding the importance of the Voyages of Discovery from the XV<sup>th</sup> century for creating the proper outset for create global links among different countries and economies, they conclude their research by stating that globalization did not begin 5000 years ago, and not even 500 years ago, but in the early nineteenth century, thus being, as the authors note, a very modern phenomenon (O’Rourke and Williamson, 2002: 45-47).

### **Modernism and globalization**

Described by most of the scholars as a phenomenon, a process, rather than an event, it seems to be generally agreed that globalization has been developing across centuries, in tandem with rather than as a consequence of the rise of modernity (Robertson, 1992: 8). It is the sociologist Roland Robertson who states that, in a "germinal" European phase (Robertson, 1992: 58), starting in the fifteenth century, ideas about national communities, the individual, and humanity began to grow. The next step in this process, which lasted until the late-nineteenth century, the ideas of global links became more shaped when, for instance, many of the states took part in "international" relations. According to the World Culture Theory, in the critical "take-off" phase, from the 1870s to the 1920s, the main "reference points" of contemporary world society fully crystallized. Several concepts became defining for the global culture, such as the correct kind of national society, the definition and early implementation of individual rights and identities, inclusion of non-European societies in international relations, as well as greater formalization of ideas about humanity (Robertson, 1992: 59). This was also the time when globalization started to be expressed in the continuous increase of transnational linkages and standards. Starting with the 1920s, until after World War II, the global arena was dominated by the attempts of various actors to assume a more important role.

Despite the various points of view regarding the advent of globalization filed above, one must note that the philosophical ideas on global interdependence stretch back for centuries, especially throughout the theories based on a Universalist orientation on humanity. Arguments reinforcing this optics are the examples of ancient Roman or Babylonian empires which practiced various types of long distance commerce and trade. One can conclude that the origins of global economy also date centuries ago, but in the matter of economic globalization, we will support the idea according to which the real

beginning of globalization was in the modern times, once the organizations, conferences, agencies and international regulated trade systems started to develop. The first stage, from the middle of the XVIII<sup>th</sup> century until 1870, best described as a phase of “incipient globalization”, we recall as main events: the growth in the formality of international relations by consolidating the sovereign states and system of states, first in Europe and North America, the relations among states being developed by frequent bilateral and multilateral agreements. Also the number of international conventions and agencies directly involved in conducting the relations among states has increased.

The second phase, between the end of the 1870s and 1920, includes a significant increase in the number and speed of worldwide communication, such as telephone, telegraph and radio, as well as the invention of what was to become the base of global transportation, the aero plane. Furthermore, several countries outside of Europe, amongst which Japan, were included in the “international society”. The gold standard was first institutionalized in order to facilitate international monetary transactions, thus leading to massive expansion of capital exports from the western economies and the appearance of multinational companies (Lawson, 2010: 156-157).

The third stage, starting in 1920 and ending in 1960, represents the era when most of the non-Western world was formally affiliated in the globalization network. The events that concluded in such geopolitical shifts were started by the foundation of the League of Nations, followed by the United Nations and its many agencies after the Second World War; the relative downfall of Great Britain and the rise of the United States; the effective globalization of the Cold War and the conflicts it aroused regarding the concepts of modernity and global order. In social and cultural terms, this stage was deeply marked by the appearance of global symbols such as “the Marlboro cowboy” or the opening of the first McDonald’s restaurant in 1955.

The final phase began in 1960 and in ongoing, including a much accelerated expansion in the global means of communication, especially supported by the electronic technology which allows instant virtual transfer of information across the globe. In addition to this, we are witnessing the growth of global influence achieved by financial institutions, such as the International Monetary Fund, used especially to promote liberal economic principles, oriented towards the market. Also, the number of international organizations and institutions has increased very much during the last decades, leading to more social movements and the appearance of a “global civil society” (Lawson, 2010: 158). The emergence of the term “global civil society” can be located at the interstices of two historic developments during the 1990s: the spread of demands for democratization and the intensifying process of global interconnectedness (Held, McGrew, 2003: 559).

Furthermore, international human migration has also registered spectacular increase, including trans-continental migration, bringing along challenges for the mono-cultural states, in the name of multiculturalism. The end of the Cold War, creating a more fluid (and some say more insecure) global system, accompanied by the fall of communism in Eastern Europe, will be further analyzed in the following part of the paper.

All these progress and events led humanity to the point where globalization is regarded as a defining feature of our times. The reaction to this is a consequent growth in the “anti-globalization” movements, which started to appear in the beginning of the 2000s, merging several events, such as top meeting of the World Trade Organization, the European Union or International Monetary Fund, or celebrating various traditions.

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### The fall of East European communism and globalization

The dissolution of the communist regimes in Eastern Europe was one of the most significant events in human history and certainly one of the most dramatic ones after the end of the Second World War. Eisenstadt wonders whether these revolutions can “be compared to the “great revolutions” - such as the English civil war, the revolutions in America, France, Russia or China? - which, in many ways, have opened the way for the modern era, creating the global political order?” (Eisenstadt, 1992: 21). Indeed, the international context in which these events have occurred and the economic, social, and political consequences they brought along qualify them into becoming a significant milestone in the history of humankind. As far as the globalization process is concerned, it is without doubt that the fall of communist regimes in these geographical area lead to the opening of former closed, state oriented markets towards the global circulation of capitals, products and services, enrolling these states into the worldwide economy networks.

The year 1989 ended the bipolar system; the possibility that wars would no longer exist between the great powers seemed clear, and the so-called “end of history” occurred, once the old ideological dispute that dominated the XX<sup>th</sup> century whether monarchy, liberal democracy, fascism or communism should model the future of the industrial society was sorted out (Buzan, Little, 2009: 416).

It is sometimes noted that “the rediscovery of the term *civil society* in Eastern Europe in the 1980s was first and foremost a response to the overbearing state and this had resonance in other parts of the world where the paternalism and rigidity of the post-war state was called into question” (Kaldor, 2000: 105-114). But communist societies were always in crisis. “Crisis situations are characterized by uncertainty, abnormality, disrupting the normal work flow, lack of information, sometimes panic, which can damage the quality of information by occurrence of individual "scenarios" aimed to fill the existing gap” (Pogan, 2015: 264). The newly recovered civil society was the one who demanded for personal autonomy and self-organization in societies characterized by growing complexity and uncertainty, and where traditional forms of political organization, notably parties, were no longer the main sites of political debate (Held, McGrew, 2003: 559). Furthermore, individuals gained rights and freedoms that they did not have during the totalitarian regimes. They could now speak up their demands towards the ruling political order, and benefit from the protection and proper representation provided by democratic institutions.

The effects of globalization are most easily perceived in the economic aspects of life, such as trade, commerce, or public access to certain goods and services, due to significant increase in foreign exchanges. As for the attempts to join the world markets, the newly sovereign nations in the East eagerly sought to establish new connections of all kinds to the Western economies. Such steps were welcomed, encouraged and reciprocated both by the United States and key countries in Western Europe. Such examples include from fashion and music to free elections and free trade, the former Eastern Bloc countries reveled in trying to duplicate all things Western in their previously closed societies. Significantly, states such as Hungary, Poland, the Czech Republic or Romania later applied for entry into the European Union and the U.S.-Western Europe military alliance, NATO (Thompson, 2018). This was a clear symbol of these countries' complete repudiation of their former involuntary alliances to the communist Soviet Union, as well as a public statement of their eagerness to become part of the international organizations regarded as stake-holders in matters of global affairs. For the former communist states in

Europe, being a part of the international globalized system meant a better chance for prosperity, economic development and common security.

It is often argued that “the place of states in the international economy and geopolitical relations has a fundamental impact on the way they will react to similar pressures of economic globalization. In the case of Eastern and Central Europe, proximity to and promises of eventual membership in a free trade zone that symbolizes and embodies norms of welfare state provision, parliamentary democracy, and trade openness together facilitated the adoption of like policies in the accession states” (Orenstein, Haas, 2005: 137). These was precisely the rhetoric on which most of the post-communist politicians based their public discourse, events such as accession to the European Union or NATO being regarded and celebrated as great national events.

Some authors argue that the multiplication of sovereign states in Eastern Europe opposes the recent tendencies of forming larger and more compact international communities, towards the separation of capital from the state order and internationalization of economic activities in Western Europe and other areas (Tilly, 2002: 245). However, in the “globalization dispute” the traditional frontiers of the state are no longer recalled as an obstacle in creating world-wide links, but merely a geopolitical conditionality. Modern globalization and the means that support it transcend distance and obstacles, and rather affect national legal systems than being affected by them. After all, globalization has been often claimed to be “in connection with liberalism, whose basic policy is a tripartite of privatization, liberalization, and deregulation”. Globalization is another expression of neo-liberalism in economic policies and its normalization around the world (Yoshikazu, 2010: 1). Besides, there has been noticed a significant tendency of a global governance besides the state directed one, and a multitude of collective identities have emerged.

For the former communist states in Central and Eastern Europe, currently members of the European Union, globalization can be seen as having both positive and negative effects. Even the European Union at the time of the development of the current Strategy (Europe 2020) has seen in globalization, along with aging, pressure on the use of resources and economic crisis, “long-term challenges”, “which annihilated substantially the benefits” of the former strategy (Ilie Goga, 2014:197). The newly achieved freedom of circulation within the borders of the European Union encouraged people from Central and Eastern Europe to travel, work, live and study in other European Union member states, leading to a significant increase of the circulatory migration flows. This does not mean only circulation of persons, but also ideas, culture, traditions, know-how, enterprise models or habits, thus leading to the globalization of the societies they originated from.

While numerous issues and problems the world is confronted with nowadays are easier to be solved globally, the *demos*, the citizens, are still confined within a given territorial boundary, facing the need to refer to a certain social, political and normative frame.

### **Conclusions**

Despite the fact that the globalization process routes centuries ago, it is undeniable that without the technologic and communication discoveries of the modernity, we would not be able to discuss issues such as global order, world-wide communication and spread of information, international trade or transcontinental transport.

This paper does not aim at reviewing the benefits or disadvantages of globalization, but rather reviewing the key historical moments that had a significant



## The Globalization Debate. From “The great Voyages of Discovery” ...

influence on this process. As argued above in the section dedicated to the influence of the fall of communist regimes in Europe on the phenomenon, it is hard to disregard the interconnection between the spread of global connections and the political and economic regimes in different parts of the world. Most of the reviewed literature agrees on the fact that “neo-liberal globalization has caused de-governmentalization and further inter-governmentalization, and has inspired a breaking away from social policy and an internationalization of capital own”. Such is the context in which concepts such as “end of history”, “the global state”, and “denationalization of capitalism” has emerged, under the dynamics of homogenization (Yoshikazu, 2010: 5). We would like to emphasize the idea that the globalization phenomenon is not expressed only in economic, cultural or communication terms, but its effects also spread on the functioning of states and the relations between international actors. The end of the Cold War did not just mean the end of communist regimes in Europe, but, more important, the transition to democracy and capitalism. These are the politic and economic systems that allow borders among states to be more fluid than ever in history, thus easing the access of globalization agents. Worldwide nations are not linked together only by economic ties, but also through international political cooperation in various models and systems, such as the international intergovernmental organizations, making it also impossible to resist foreign influence in all aspects of state matters.

As demonstrated in the first section of the paper, definitions on globalization are numerous and usually differently angled, but a generic way of understanding globalization is to consider it as a “process of creation of a worldwide system in which no event, process or important action remains circumscribed within the geographic area in which it was born. In the same way, events, processes and actions of the global level have an impact, either deliberately or involuntarily, on all the local levels” (Attina, 2009: 50). We may conclude by adding to this explanatory definition that the evolution of such system at a given moment significantly impacts on further or future developments in other geographical or chronological periods. To sum up, it was not the Great voyages of discovery, the technologic revolutions, the spread of long distant means of communication, the generalization of international exchange, or the fall of non-democratic political regimes that determined globalization to occur, but all these events and phenomena are mutually determined, derive from each other, shaping the world as we witness it.

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## ORIGINAL PAPER

# Historical Evolution of Ukraine and its Post-Communist Challenges

César García Andrés \*

### Abstract:

The current borders of Ukraine arose during the Soviet ruling of the country, different regions were incorporated into their territory from the 20s to the 50s of the last century due to the annexations and territorial transfers, that were made by the different leaders of Moscow. Thus, after the collapse of the Soviet Union, Ukraine achieved independence with a territorial extension that reaches all regions inhabited mostly by ethnically Ukrainian population.

At the moment of independence most of its citizens put their regional problems aside to show themselves as a united country and so that Ukraine achieves international recognition as a new independent State. However, as time goes by the disagreements have resurfaced, which shows that these tensions continued existing although they seemed hidden for years.

We need to keep in mind that to understand all these issues it is necessary to analyze how the historical evolution of the Ukrainian territory has been, yet it is not only about climatic differences or economic issues. For this reason, this paper aims to study the differences that have historically existed in Ukraine. These differences were caused by territories that once were part of other powers and now are integrated in Ukraine and by the influences received by external actors. It should be considered that most of the current conflicts come from there.

Therefore, this contribution intends to show how, from the historical formation of the Ukrainian territory, the conflicts are taking place in the Slavic country. To carry out this study we will focus on a historical reconstruction of the national question.

**Keywords:** *Ukraine; Historical evolution; Soviet Union; Independence; Post-communist conflicts*

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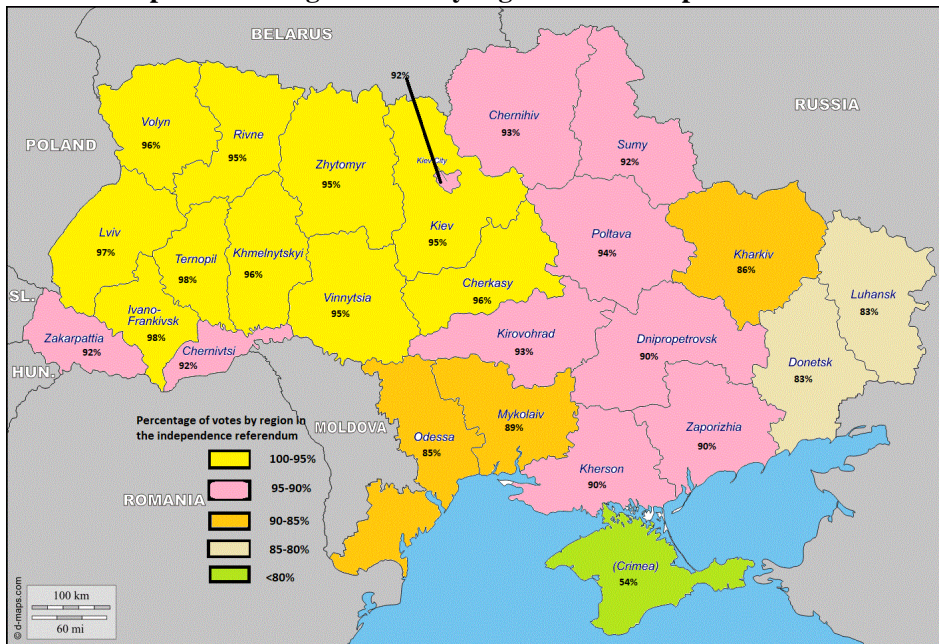
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# Historical Evolution of Ukraine and its Post-Communist Challenges

## 1. Introduction

The current situation of Ukraine at present is very hazardous, as it is seeing its territory disintegrating. However, at the beginning of the 90s of the last century the contrasts between the different regions of the Ukraine were left aside. All of this was due to achieve a fundamental objective for this territory. Following the collapse of the Soviet Union in 1991, Ukraine became independent after a referendum in which 90% of its population voted supporting the independence (Rupérez, 1994:137).

**Map 1. Percentage of votes by region in the independence referendum**



**Source:** author's own elaboration

This was undoubtedly the event with the greatest consensus among the Ukrainian population as a whole. Ukraine's formation as an independent state, however, did not reduce the great differences that still existed and exist between the regions that are part of the country. It is necessary to delve into the history of Ukraine in order to understand these inequalities.

For most of its history, Ukraine has been part of different empires that have struggled to control their territories. Only during the period known as Kievan Rus did the principalities become independent. Nevertheless, the invasion of the Mongolian Empire in the 13th century subjected Ukraine under a new control (Nicolle and Shpakovsky, 2011: 13). From that moment on, its different regions formed part other regional powers.

Map 2. Extension of Kievan Rus –in the early to mid-11th century–



Source: Encyclopedia Britannica

The original territory of Ukraine was annexed to Russia by Czar Alexis I in 1654 due to the Treaty of Pereyaslav (Lukowski and Zawadzki, 2002a: 93). However, it was not until 1667, with the Treaty of Andrusovo that the effective distribution of Ukrainian land between the Polish-Lithuanians and the Russians took place. By this agreement the left bank of the Dnieper River would be included in Russian territory and the right bank would become part of the Polish-Lithuanian side. From this moment there was a great Russification of these Ukrainian territory, losing part of its essential identity signs (Cucó, 1999: 262).

In the final decades of the 18th century the borders of Ukraine and the Black Sea were secured by Russia. In this process Crimean Peninsula was incorporated into the Russian Empire in 1783, when it was taken over from the Ottomans. During the years 1772, 1793, and 1795, Poland was divided. Due to this fact the western part of Poland, that was previous part of Ukraine before, was divided between the powers of the time: Russia and Austria.

With a Ukrainian territory fractured between different empires, we reach the 19th century, a period in which nationalism began to emerge with force. As a result, the division of Ukraine marked the different evolution between the eastern and western parts. The Ukrainian national awakening in the eastern part of the country, belonging to the Russian Empire, was linked to the obstacles of using the Ukrainian language and of sharing their own history addressed by Tsarist control. In the west, this national awakening was related to the existence of the Greek-Catholic Church and the coexistence with the Polish

## Historical Evolution of Ukraine and its Post-Communist Challenges

population. However, it would not be until after the 1905 Revolution and, above all, since the 1917 Revolution that Ukrainian nationalism had transcendence (Zapater Espí, 2002: 343).

### 2. Ukraine under the Soviet Government

#### 2.1. From the First World War to the origin of the USSR

Due to the February Revolution of 1917 and the fall of Tsarism, there was a rise of nationalism in the territories that belonged to the Russian Empire. In words of E.J. Hobsbawm: "*among activists of oppressed nationalities, such as Polish and Ukrainians, the event gave rise to hopes for reform, perhaps even independence*" (Hobsbawm, 1991: 137).

Only a few days later, in March, a Ukrainian Central Council 'Rada' was established in Kiev. Thus, on 13 June 1917, the Provisional Government of Petrograd proclaimed an 'Autonomous Ukrainian Republic' (Carr, 1985: 310), with which the central government attempted to curb the Ukrainian nationalist boom, even though it had only some administrative functions.

Due to the bad relations between the Ukrainian 'Rada' and the Moscow governments, the independent movement was intensified after the October Revolution of 1917. On 20 November the 'Rada' proclaimed the People's Republic of Ukraine, and after it, the soviets increased their presence on Ukrainian territory that had belonged to the Russian Empire. In the city of Kharkov and with the support of the main industrial centers in the eastern part of the country, they established the Socialist Republic of Ukraine at the end of December 1917.

Faced with this situation, the Republic of Ukraine was proclaimed an 'independent, free and sovereign state of the Ukrainian people' in Kiev of January 1918. Some weeks later, the confrontation between the two governments established in Ukraine was developed and resulted in the rapid Soviet occupation of the country.

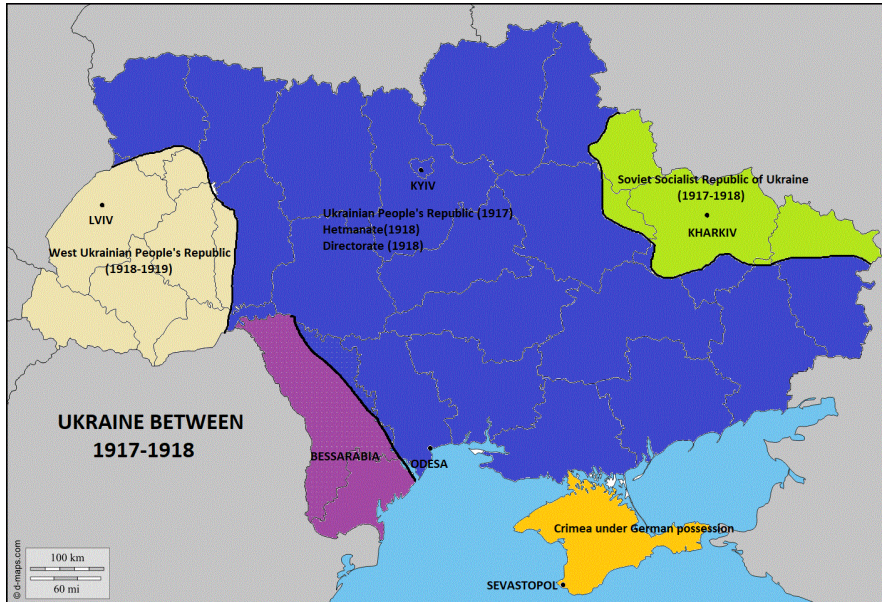
On 9 February there was a radical turnaround in the outlook, when Ukraine signed a separate peace treaty with the Central Empires in Brest-Litovsk in order to get their aid against the Soviets. With German assistance and the signing of peace on 3 March with the Bolsheviks, the controlled territories in Ukraine were returned to the People's Republic.

The country was occupied by the Germans according to the Ukrainian 'Rada' for the aid received earlier. There the German rule imposed a regime of terror, dissolving the 'Rada' in April 1918 and proclaiming the Hetmanate (Bruhat, 1977a: 39). However, after the defeat of the Germans in First World War, the power they had created disappeared with them, giving way to the period known as the Directorate since December 1918.

As for the western part of Ukraine, it was controlled by the Austro-Hungarian Empire, but after the beginning of the disintegration of the Empire, the National Council of Ukraine was formed of October 1918 in Lvov. With this institution, the People's Republic of Western Ukraine was created at the end of the same year. But with the birth of Poland as an independent state at the end of the First World War, Poland wanted to gain control of the newly created Republic. And consequently, a few months after its creation, the Polish destroyed the Western Ukrainian Republic and occupied Galitzia (Lukowski and Zawadzki, 2002b: 216).



Map 3. Ukraine between 1917-1918



**Source:** author's own elaboration

For their part, the Ukrainian Bolsheviks re-entered in Ukraine of May 1918, starting the civil war on Ukrainian territory. By the end of 1919 they had recovered the ceded territory following the Brest-Litovsk Peace: The Red Army's victories in the Russian Civil War and the reconquest of Ukraine were seen in Poland as a direct threat to the country (Bogdan, 1991:174). Therefore, after a series of confrontations between Russians and Polish, borders were established. On 12 October 1920 the Treaty of Riga was signed, which would be confirmed on 18 March 1921: the border was established to the east of the Curzon line and Poland incorporates Galitzia (Bruhat, 1977b: 44).

After this war, the Ukrainian Soviet Socialist Republic became one of the founders of the Soviet Union by signing the USSR's Treaty of Establishment on 22 December 1922. Thus, by mandate of Lenin the eastern part of current Ukraine became part of the Socialist Republic, and even the capital was for a few years Kharkov 'in 1934 it will be installed again in Kiev' while the western part continued to be part of Poland.

As for Crimea, it was under German rule during the war. But already below the Soviet regime, it became the Autonomous Crimean Soviet Socialist Republic integrated into the Russian Soviet Socialist Federal Republic from 1921 to 1941 (Kurz Muñoz, 1992: 177).

## 2.2. The interwar period in the Ukrainian Soviet Socialist Republic

During the first years of Soviet government the so-called New Economic Policy was developed. Within which the Slavic country took place 'Ukrainianization' in diverse cultural, political and economic spheres. The 20s of the last century were a decisive stage for all these soviet countries because of the configuration of their national consciousness



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took place (Taibo, 1993: 17). However, this policy consisted only of a strategy of Moscow's central power to ensure that Sovietization would reach all parts of Ukraine through its own means. But it must be also considered that this willingness of the Soviet Government is at odds with the transfers of the Russian population that arrived in Ukraine between 1921 and 1922.

After Lenin's death in 1924 a new period marked by Stalin's accession to power began, which in the following years slowed down this 'Ukrainianization'. The relative consent of the Ukrainian people led to the formation of certain national groups.

Several imaginary anti-Soviet organisations were 'discovered' starting with the Ukrainian Liberation Union in July 1929 (Service, 2000: 195). Opposition to Ukrainian nationalism and to everything related to Ukrainian culture and history hardened from 1928 onwards. It was from this year that two important policies were implemented in the USSR, on the one hand, the collectivisation of farms and on the other, the First Five-Year Plan for the industry.

The forced collectivisation of the Ukrainian countryside began in the early 30s. Although the situation became more unsustainable from 1931 onwards, when the state confiscated cereals on a massive scale. Thus, causing one of the most dramatic and darkest periods in Ukrainian history between the years 1932-1933 called Holodomor, the Great Famine –for more information look for: Conquest, Robert., 1986. *The Harvest of Sorrow: Soviet collectivization and the Terror-Famine*, Nueva York: Oxford University–. Despite numerous studies published, it is very difficult to give a number of victims because Stalin's regime was responsible for hiding the real situation in Ukraine for a long time.

But in the 30s there were even more disasters for the Ukrainian population, as the Great Purge occurred from 1934 to 1938. The elites of the Ukrainian population were purified, either by directly killing them or by being deported to Siberia. What is demonstrated is that these facts served to foment fear among the inhabitants of the country, putting an end to any pro-Ukrainian movement. This is related to Ukraine's SSR.

Regarding the situation in the Ukrainian part of the country belonging to Poland the persecution of its inhabitants, was intensified. Such as the persecution of the Ukrainian language or the Greek-Catholic church in the area, which will be of vital importance for later events.

Already at the end of this decade and with Hitler's rise to power, Nazi Germany and the Soviets were preparing for an imminent war, which will be key to Ukraine's territory.

### 2.3. From the Second World War to the end of the communist period

After the invasion of Poland by Germany in September 1939 and the signature of the Secret Pact between Molotov and Ribbentrop, the Soviet Union annexed the Ukrainian part that had been part of Poland until then. In June 1941, however, the Nazis broke the Polish Pact division by invading the territory that belonged to the Soviets. In this way the German-Soviet War would begin, which would not end until 1945, and which would have important consequences for Ukraine.

The Germans' plan was to defeat the Soviet Union and the first step in achieving that objective was to control Ukrainian territory. In this way, the Third Reich would ensure control of important mineral, industrial and agricultural resources –the industrial zones of Leningrad, the Donetsk basin, the plains of Ukraine– and would directly hit the centre of Soviet power (Núñez Seixas, 2007: 33).

At first the Ukrainians saw the Germans as liberators from the Soviet yoke, but nothing beyond reality. In Soviet Ukraine, Germany established a brutal occupation zone, the Reichskommissariat Ukraine –1941-1944–, where Ukrainians were treated as subhuman individuals and their agricultural products used as resources for the Reich (Snyder, 2014: 267).

After the victory of the Soviets at the Battle of Stalingrad in February 1943, the Germans retreated, and Red Army managed to enter Ukraine again and reconquer the lost territory. Thus, Kharkov fell back into Soviet hands in August 1943, Kiev in November 1943, and Lvov in July 1944.

At the end of the war the USSR annexed in 1945 the former Ukrainian territories of Galitzia, Volinia, Subcarpathian Ruthenia, Bessarabia and Bukovina. (López-Davalillo Larrea, 2001: 261). Thus, most of the regions of the independent state of Ukraine that emerged in 1991 were united with the exception of Crimea. A topic that will be discussed later.

The most drastic change was that experienced by the population of the new Soviet incorporations, that is, the western part of Ukraine. As soon as the war was over, Stalinist politics set out to repress all attempts at nationalism, especially regarding the Ukrainian language and the Greek-Catholic church. During the years 1946-1948 there were huge population transfers on the Ukrainian-Polish SSR border. In the part that had already been part of the USSR the situation was different as they were still afraid of the events of the 30s.

The differences between the two sides were already considerable, due to the relative tolerance of the Habsburgs. That allowed Ukrainians in Galitzia to preserve their language. In 1944, depending on the districts, between 78% and 91% had it as their first language, while in the territories once ruled by the Tsar, even those who considered themselves Ukrainians often spoke Russian easily (Judt, 2006: 903).

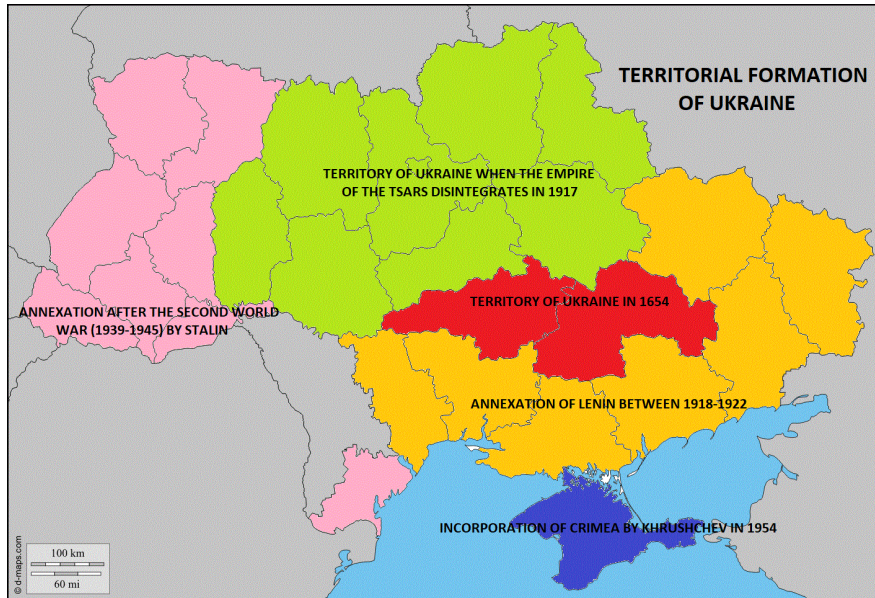
To complete the territorial formation of Ukraine we must go until the year 1954, when Crimea was incorporated into the territory of the Ukrainian Soviet Socialist Republic. During Second World War the Peninsula was not spared from German occupation, which lasted from October 1941 to April 1944. After the Soviet invasion and the end of the war, Crimean population was treated by the Stalin government as a collaborator with the Germans. But this accusation had no other objective than the mass deportation of the indigenous Tatars population in order to repopulate the region with Russian inhabitants. Thus, in 1946 Crimea lost its status as an autonomous republic and became a mere province of Russia (Sellier and Sellier, 2006: 78). With Stalin's death and Khrushchev's rise to power in 1953, the situation in Ukraine improved compared to earlier times. The Republic was favoured by the policy pursued by the new leader in addressing the problem of non-Russian nations in the Soviet Union. In fact, to commemorate the 300th anniversary of the Treaty of Pereyaslav in 1654, Ukraine received the Crimean Peninsula as a 'gift'. There are three fundamental aspects that must be considered:

- Firstly, the symbolic use of the Treaty of Pereyaslav, since for the Russian people it is the union of Ukraine with the Tsarist Empire, while for the Ukrainian nationalists it symbolises their independence.
- Secondly, as we have already pointed out, after the deportations of the indigenous –Tatars– Crimean population, most of it was populated by Russians. Due to the population transfer carried out by the central Soviet governments, the number of the Russian population in Ukraine's SSR demographic data has increased.

## Historical Evolution of Ukraine and its Post-Communist Challenges

- Thirdly and finally, we must talk about an indirect consequence: in transferring the moral problem of these deportations carried out by Stalin to the Ukrainian government.

### Map 4. Territorial formation of Ukraine



Source: author's own elaboration

For the rest of the Soviet era, Ukrainians were not a major problem for Moscow's leaders, as they were in other parts of the Soviet Union. There were simply a few isolated events of rebellion or the exaltation of nationalism during the Brezhnev period. In fact, it will be one of the Republics where nationalist and independence ideas developed later during the time of Gorbachev's Perestroika.

### 2.4. From Perestroika to independent Ukraine

The beginning of the end of the Soviet world began with the accession to power of Mikhail Gorbachev in 1985. Without a doubt the key moment was the beginning of the policy known as Perestroika. To our effect this policy helped to experience a rapid expansion of nationalist ideas by the republics of the USSR. However, in Ukraine, as in the other Slavic republics this feeling appeared later –1990-1991–. But there were a number of facts that paved the way for the final events:

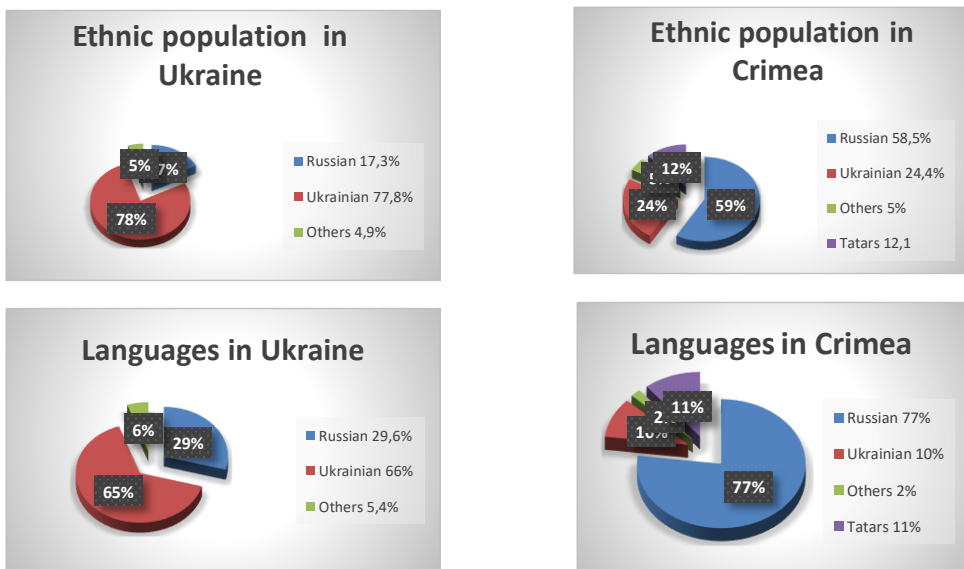
- The Chernobyl accident in 1986. After this serious disaster the population began to highlight the policies carried out by Moscow in the past.
- Mining strikes. In July 1989, a strike by the Western Siberian coal miners in Kurznetsk broke out. Shortly thereafter, their colleagues in Donetsk, Ukraine, joined the strike (García Higuera, 2015: 108).
- The creation of the National Front. In December 1989, the Popular Front for Perestroika –RUKH– was born in Kiev and immediately formulated a programme and statutes (Carrière D'encausse, 1991: 194). After its implementation, the main difficulty lies in bringing the two parts of Ukraine closer together.

From that moment onwards, events were accelerated, as in July 1990 Ukraine's sovereignty was announced and on 24 August 1991 independence was proclaimed. The referendum took place on 1 December of the same year, in which the whole population gave their approval to independence. The Ukrainian people freely expressed their will in the referendum on independence. The world recognized Ukraine, even though Gorbachev repeatedly warned that it would be a 'catastrophe' if the 'union' was broken (Martín de la Guardia and Pérez Sánchez, 1995: 341).

### 3. The challenges of the post-communist Ukraine

The arrival of independence did not mean that Ukraine began an easy path alone. In fact, from the first moment it will encounter serious difficulties and all of them inherited from its time as a member of the USSR. These include the creation of the Commonwealth of Independent States –CIS–, the location of the Black Sea Fleet and the treatment of Soviet-era nuclear weapons. There are undoubtedly two conflicts still going on in the Slavic country: the first is the situation in the Crimea and the second is the secessionist movement in the east. In addition to this, there are large differences in votes in the various presidential elections between the Ukrainian regions. On the one hand, the candidates most prone to relations with Russia –Kuchma, Yanukovych– won in the eastern and southern parts of Ukraine. On the other hand, if the candidates were more favourable to relations with the European Union –Yuschenko, Poroshenko– they received more support in the central and western part of the country: the struggle of forces that will have serious consequences among the country's population. Due to this difference in vote in the elections to be held in Ukraine it can be seen that the differences between the east and west of the country continue despite the formation of the country as an independent state. This situation has become evident in the two conflicts that will be seen below. When talking about Crimean Peninsula, it must be highlighted that the majority of its population is ethnic Russians, due to the transfer of population following the deportations of the native population. During 1991 the Crimean Tatars were able to return to their historical homeland, although they only represent 12% of the total population.

**Chart 1. Ethnic population and languages in Ukraine and Crimea 2001**



## Historical Evolution of Ukraine and its Post-Communist Challenges

Source: author's own elaboration from the 2001 Ukrainian Census

Since Ukraine's independence Russia announced that the cession of the Crimea to the country should be reviewed. This fact served the separatists of the Peninsula to organize a referendum in favour of independence. To ease the tension, Ukraine restored the status of the Autonomous Republic of Crimea in 1991, which was ratified in 1992. However, in the same year, the Parliament of the region proclaimed its independence and formulated a secessionist constitution. The Ukrainian 'Rada' struck a blow that same year, returning to the Constitution of Ukraine.

When relations between the two sides appeared to be calm, 1994 saw a return to criminal separatism with a new declaration of independence. In 1995, however, the situation changed again, with the adoption of a new constitution stating that Crimea belonged to Ukraine; this fact must be seen in conjunction with the presidential elections held in 1994. The election of the new president Leonid Kuchma, a more pro-Russian president, appeased the Crimea's claims.

It was not until 2014 that the question of the Crimea reappears in the international media. Following President Yanukovich's refusal to sign an association agreement with the European Union in November 2013, the Ukrainian population occupied the streets in the form of a protest, known as Euromaidan. These concentrations occur mainly in the western part of the country and had its antecedent in the Orange Revolution that took place between 2004 and 2005, opening old wounds. After a few months –December 2013 to January 2014– of serious confrontations between the demonstrators and the forces of law and order, the situation reached its peak.

Following the departure of Yanukovich from the country in February 2014, some areas rebelled when an interim Government was established in Ukraine. Putin's government hastened to incite certain pro-Russian regions to insurgency, with the intention of reviving the old ghosts of independence. Everything suggested that the formation of the new Ukrainian government would come closer to the policies of association with the European Union as called for by the Euromaidan demonstrators. These incitements were more far-reaching: on 11 March 2014, the declaration of independence of the Crimea took place, which became official after the referendum on 16 March 2014. In which almost 97% of the Crimean population voted in favour of unification with Russia (García Andrés, González Martín & Martín de la Guardia, 2017: 117). Thus, two days later Crimea joined the Russian Federation officially and unilaterally. This was essential for subsequent relations between Russia and Ukraine, and even between Russia and the Western world.

At the same time as in Crimea, incitements by Putin government influenced also other regions of Ukraine such as Kharkov, Lugansk and Donetsk (in the east) and Odessa and Jerson (in the south). The main demands are Ukraine's federalism and an approach to Russian policies. Following the 'success' of the Crimea, in April 2014 two of these territories were proclaimed: Donetsk People's Republic and Lugansk People's Republic. In other cities such as Kharkov and Odessa there were also demonstrations that were stifled by the central government.

Despite the mediation of some international organizations, –the European Union, the Organization for Security and Cooperation in Europe, or the United States– the situation worsened in the rebel areas of Ukraine. Between 17 and 18 April, the Geneva

Agreements took place, which proposed, on the one hand, the disarmament of the pro-Russian armed groups in eastern Ukraine and, on the other; the Ukrainian institutions committed themselves to the elaboration of a Constitution in which federalism of the regions would enter with force. However, the situation did not improve as the rebel groups were not involved in the drafting of the agreement and did not accept it.

In May of the same year the separatists of the Donetsk and Lugansk –Donbass– regions held a referendum for self-determination. According to the organisers, it was a success in terms of the overwhelming majority in favour of consultation and participation. Following the announcement of the ‘new Eastern Republics’, Ukrainian authorities launched an offensive against them in an attempt to stop the uprising. As the armed conflict intensified in form and spread over time, so much so that it continues to exist today. The presidential elections were held in this climate of tension. The Provisional Government had proposed the voting for 25 May –the date of these elections was not chosen at random, as the European Parliament elections took place on the same day in the European Union–. With the victory of the candidate Petro Poroshenko, the tone of the confrontations raised, because his political program was based on a rapprochement towards the European Union. These pro-Russian demonstrations bring to light an idea of separatism that is closely related to the historical evolution of Ukraine: Novorossiia, that is, the region incorporated by Lenin into Ukraine's SSR between 1918 and 1921.

**Map 5. The ‘idea’ of Novorossiia with the territories in conflict**



Source: author's own elaboration

Everything we have seen in this chapter can be summed up in the words of Zbigniew Brzezinski: "*Ukraine, an important new space on the Eurasian board, is a geopolitical pivot because its very existence as an independent country helps to transform Russia. Without Ukraine, Russia is no longer an Eurasian empire*" (Brzezinski, 1998: 54).

#### 4. Conclusion

Simply if we approach to the etymological meaning of Ukraine we can realize its complex formation: ‘border land’. As we have seen throughout the article there is a clear evolutionary difference between Eastern and Western Ukraine. The different divisions of



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the country throughout history and the membership of different empires highlight the current composition of the Slavic state. Undoubtedly, the period that produced the greatest differences between the two zones, is the Soviet period.

We need to remind that eastern Ukraine had been integrated in Russia for a long time, and its religion, language and history were assimilated over time. During the first independence that came in a short period of time before the Soviet era, it served to attract the Ukrainian nationalist feeling. This feeling was contained throughout this period with the repressive policies of the communist leaders.

Western Ukraine was ruled by other powers and its late integration into the Soviet Union made more difficult the assimilation of Russia, though also with more reticence. However, even if it was clandestinely there was always a greater survival of the purely Ukrainian culture in this region.

And what about the Crimea? This region was depopulated from its native Tatars inhabitants by Stalin for his interests on the Black Sea through the arrival of Russian population.

Thus, looking at the historical evolution of the territory of Ukraine, we can understand which the current situation of the country is. So much so that by comparing the area of Ukraine that belonged for centuries to the Russian Empire the so-called Novorossiia, we can see that they include approximately the same areas. That explains the importance that Ukraine currently has for Russia. It is not just a question of cultural or linguistic identities, but behind it all are economic and geopolitical interests. It is therefore necessary to find a solution as soon as possible to one of the most serious post-Soviet conflicts of recent years.

To conclude, the union that the Ukrainians made at first to achieve their independence from the Soviet yoke was only a mirage. In the following years and currently, the post-Soviet inherited problems have only reopened old wounds. Russia's attempts to keep Ukraine under its zone of influence have reopened those old wounds.

It is essential to remember that the success of Ukraine's existence as an independent country was thank to the action of all the inhabitants of the country. All the regions –to a greater or lesser extent– as we have already analyzed in this article voted in favor of independence, which shows that it is possible to achieve understanding between the different areas. The arguments of both sides need to be put on the table in order to find a solution to this major problem.

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## ORIGINAL PAPER

# Post-Communism and Desintegration: Somalia in the New World Order

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**Abstract:**

The years after the Cold War were characterized as a confusing period, both at a global and a regional level. From the ashes of communism rose a new world order that altered the previous situation not only in Europe, but also in America, Africa and Asia. In this way, many countries were affected by the change, especially in the African continent, which for decades had become a board on which communist and liberal powers face through the so-called proxy wars. Likewise, Somalia suffered the consequences of the new international situation which had already developed in the late 1980s. This country, which was a socialist state, but which surprisingly was an ally of the United States, suffered since 1991 a process of unprecedented state collapse, becoming the paradigm of Failed State.

Post-communism in the Horn of Africa is a period of instability because of terrorism, piracy and warlordism. This situation is a direct consequence of the collapse that Somalia suffered in 1991. The objective of this paper will be based on analyzing the main causes that triggered the civil war and the disintegration of Somalia. Although the internal causes (clan group, weak state, conflicts, etc.) have traditionally been exposed as the main reasons for this collapse, it is necessary to take into account other external reasons such as the new international strategies, the regional situation or the progressive disinterest of the United States in supporting Siad Barre's regime. Considering all these causes, it will be possible to wholly understand why Somalia became a Failed State.

**Keywords:** *Somalia; Failed State; Post-communism; Siad Barre; Collapse*

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## **1. Introduction**

The end of the Cold War produced an alteration in many state structures worldwide. The case of Somalia is paradigmatic because after almost three decades it remains as a Failed State. The inability of his government to control the country due to the actions of the guerrillas, warlords, terrorists and piracy have created an untenable situation. Although Somalia was not the only case of Failed State (Liberia, Rwanda, Sudan...) the truth is that its inability to be rebuilt is not very common. In the end, a dictatorship falling does not always create a political vacuum. Many of the countries that suffered dictatorships did not end up in anarchy (Bahdon, 2012a: 19).

First of all, it is vital to analyze what were the causes that led Somalia to the disaster. This work has been previously done, but the focus has always been on some specific causes, without taking into account that it is necessary to carry out a holistic vision. Depending on the origin of the source, the causes of the disintegration of Somalia vary. On the one hand, western historiography has centered its attention on the clan factor, religion or the lack of a national feeling. On the other hand, there are numerous interpretations that condense the evils of the continent into an external conspiracy obsessed with destroying the social, religious and political pillars of the african population (Gutiérrez de Terán, 2011a: 13).

Throughout this work we will analyze in detail all the possible elements that produced the disintegration of the country in 1991. Thus, the roots of this conflict that ended up devastating Somalia will be analyzed, considering both external and internal causes. Faced with the traditional image that establishes the division into clans of Somalia as the main culprit, we will see that the causes are very variable. This review will allow us to reflect on the current situation in Somalia and why it has been unable to go through a rebuilding process that would allow it to create a better future for a population that is exhausted by the ravages of violence and instability.

## **2. From Siad Barre's Government to the Civil War**

General Mohamed Siad Barre came to power in 1969 through a coup led by the military discontented with the government of Ali Shermarke. Thus, Siad Barre established a Supreme Revolutionary Council inspired by scientific socialism (Martínez Carrera, 1993: 102). Since then the new government controlled the country with an iron hand, giving great importance to the irredentist project of 'Great Somalia'. This led him to face Ethiopia in the so-called Ogaden War (1977-1978). The defeat of Somalia created a deep impact on Somali society and some evidence even "suggests that by the mid-1980s Somalia was already a failed state. With the partial exception of the security sector, most government institutions began to atrophy in the years following the disastrous Ogaden War with Ethiopia in 1977-78. Fierce government repression, heightened clan cleavages and animosities, gross levels of corruption, and low salaries all combined to accelerate the state's decline. The public school system, a source of pride and progress in the 1970s, crumbled. Production on state-run farms and in factories plummeted" (Menkhaus, 2007a: 80).

In this situation, different forces emerged contrary to Siad Barre's regime. During the Somali civil war a first stage of direct confrontation began between the troops of Barre and these armed organizations that, from north to south, declared their objective to overthrow the president (Gutiérrez de Terán, 2007a: 38-39). It should be noted that in 1990, in this conflictive environment, "114 intellectual and urban elites, consisting of the

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most notable politicians, religious leaders, professionals, and members of the business community, acknowledged the severity of the crisis and issued a manifesto to Siad Barre” asking him to withdraw from power to save his society from an imminent collapse (Haji Ingiriis, 2012a: 68).

His rejection and growing tension led the Somaliland region to continue fighting for its independence, something achieved in 1991. But the state break caused by Somaliland was not the worst consequence. It is estimated that between 1988 and 1992 the civil war left at least 250,000 deaths due to hunger and war and an estimated one million people fled the country. War crimes spread throughout the territory and clan ties were broken by struggles for power and conflict. In addition, the vacuum in the government allowed different warlords to gain control of some regions. Soon the first terrorist organizations also appeared in this breeding ground (Menkhaus, 2007b: 81).

When Siad Barre left Mogadishu in January 1991, he left a country totally devastated and with few options to recover. Then, “troops, commanded by General Mohamed Farah Aidede gave chase to Siad Barre, while others under control of Ali Mahdi Mohamed, a wealthy Mogadishu businessman, remained in the capital and declared themselves the new government” (Clark, 1993a: 112). This absence allowed different factions to control the capital and to be confronted in order to gain power. To understand how Somalia could reach this situation it is necessary to analyze what were the factors of this disintegration process.

### **3. External causes: a new world order**

The new international situation is going to have some consequences throughout the world, but especially in the Horn of Africa. The logic of a post-cold war and the regional context are two factors that should be taken into account when Somali crisis is evoked.

#### **3.1 Post-Cold War era and the new international context**

The course of the Cold War placed Ethiopia and Somalia in two opposing blocs. The first state was an ally of United States until 1974, when Haile Selassie gave up the power. The revolution that was led by Mengistu Haile Mariam was followed by new state structures based on scientific socialism. Since that moment Ethiopia and its government was protected by the USSR. Interestingly, Somalia was part of the socialist bloc until 1977. But during the Ogaden War the USSR and Cuba, traditional allies of Somalia, decided to support Ethiopia. As a result, when the war ended up Somalia had to look for new supporters and finally Siad Barre joined United States coalition. Since that year, Somalia became a strategic country for the western bloc due to its geostrategic situation. The fear of the expansion of communism allowed Siad Barre to acquire military and economic aid worth around 800 million dollars, an aid that did not take into account human rights abuses (Jackson, 2007: 704).

However, this status was altered after 1985. Gorbachev's coming to power changed the logic of the Cold War through the new international policy. “In the case of Eastern Europe, this approach entailed Soviet tolerance for the fall of single-party communist states and a recognition of the need to allow the peoples of Eastern Europe to determine their own political paths independent of Soviet control. Throughout the various regions of the Third World, the new political thinking entailed a rejection of revolutionary struggle and, instead, the need for political negotiations and compromise to resolve ongoing regional disputes and civil disputes” (Schraeder, 1994a: 91-92). It was then that the Siad Barre regime began to suffer the consequences: United States, in view of the new

situation, no longer needed to continue financing an authoritarian regime in Somalia. Thus, Siad Barre was increasingly isolated and the cut of resources prevented him from staying in power.

### **3.2 International aid for Somalia**

Somalia received large amounts of international aid. If until 1977 he had benefited from the economic and military financing provided by the USSR, since that year United States became the main benefactor of the regime. In exchange for the strategic situation of Somalia, the US provided the necessary assistance for the internal stability of the regime. This aid allowed to temporarily stop the Somali armed groups that, sponsored by Ethiopia, began to put the Siad Barre government against the wall (Gutiérrez de Terán, 2007b: 35). Menkhaus explained how this aid was addressed in two directions. “Externally, the Somali state became a ward of the international aid community. Internally, it devolved into an instrument of repression and expropriation, a tool to dominate political opponents and rival clans, expropriate resources, and above all serve as a catchment point for foreign aid that was then diverted into the pockets of civil servants clever, powerful, or well connected enough to place themselves at strategic spigots in the foreign aid pipeline” (Menkhaus, 2007c: 80-81).

This unsustainable situation led the government to completely depend on foreign aid, which reached 57% of the country's GDP (Henze, 1991: 125). Due to a combination of strategic interests, donor states had ignored the systematic state corruption, land grabbing sponsored by the state and the corrupt attitude of its security forces (Menkhaus, 2014: 156). Nonetheless, in the new international context, many donors no longer needed to continue supporting Siad Barre. The subsequent cancellation of international aid from the Western countries between 1988-1989, prompted the rapid collapse of a government devoid of the resources necessary to control the country (Menkhaus, 2007d: 80-81)

It is also crucial to refer to weapons smuggling that spread in the region due to international aid. First, the ongoing support of the USSR to Somalia until 1977 allowed this country to build the most powerful army in all Sub-Saharan Africa, consisting of more than 37,000 soldiers, heavy artillery and a modern air force (Meredith, 2011: .562). This concede Siad Barre's strength to face his enemies abroad, but also in the interior, facing opponents with the aim of staying in power at all costs (Basteman, 1996: 126). Likewise, the military leaders of the Barre government, with access to all kinds of weapons, began to undermine the formal institutions of the state such as the police or the army, creating their own networks that allowed them to oppress the masses and exploit resources for their own benefit (Khayre, 2016: 23). When the country was disintegrated many of these leaders maintained control of this huge amount of weapons, allowing them to establish their power in different regions and cities.

Notwithstanding, cutting funding can not solely explain the reasons that led to the country's disintegration. The collapse of the government could have allowed another leader who had the ability to lead the country to stability and democratic transition to take power, as happened in other countries in the region, such as Ethiopia.

### **3.3 Regional context**

It is essential to reflect on the regional situation that also affected Somalia. This country, together with Ethiopia, lived since the end of the 1980s a process of state decomposition. “By 1988 Siad Barre 's fragile grip on Somalia was paralleled by Mengistu's own desperate attempts to keep the upper hand in a series of civil wars in

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Ethiopia. The two despots predictably struck a deal, abandoning support for insurgent groups waging war from their respective territories” (Clark, 1993b: 111).

In the case of Somalia, its stability was compromised since 1981 by the military success of the Somali National Movement (SNM) formed by members of the Isaaq clan, as well as other groups such as the United Somali Congress (USC) constituted by the Hawiye or the Somali Patriotic Movement (SPM) of the Ogadeni. Mengistu had to face old enemies of stability in Ethiopia: a coalition of three guerrillas formed the Ethiopian People's Revolutionary Democratic Front (EPRDF) with members of the Tigrayan People's Liberation Front (TPFL), the Oromo Liberation Front and the Eritrean People's Liberation Front (EPFL) (Schraeder, 1994b: 93) Somalia had also supported the so-called Western Somali Liberation Front (WSLF) which fought for the integration of Ogaden within Somalia and which was later replaced by the Ogaden National Liberation Front (ONLF) (Ododa, 1985: 289).

Although this pact tried to close one of the open fronts, the truth is that it came too late and by 1988 both governments were already noticing the wear and tear that was supposed to stay in power when all these formations were trying to overthrow them.

### **4. Internal factors: beyond clan division**

When talking about internal motives it is commonly believed that only clan division caused the disintegration of Somalia. Although it was an important fact, it was not the unique factor. Adversely, it will be scrutinized other causes like postcolonial state, Somaliland independence or Siad Barre's rules.

#### **4.1 Postcolonial state**

Postcolonial state has been considered the main culprit of the African disaster due to the enormous social, cultural, political and economic diversity existing within the new states. Biju Kumar referred to the inability of the postcolonial state to respond to the phenomenon of diversity in relation to communism, ethnic nationalism, regional identity or secessionism (Kumar, 2005: 936) However, we must bear in mind that each state has its particularities. The case of Somalia is very striking due to the ethnic identities. Although there are different clans they all feel Somalis. Therefore, it does not seem plausible that the fragmentation of the country is caused only by different nationalist tendencies.

Other authors, such as Taddia, have explained postcolonial dysfunctionality through the artificiality of this state model that was something imported from outside the continent (Taddia, 2004: 99). In the same line, this failure is justified because the incorporated institutional structures were totally alien to the Somali institutions prior to colonization. The clash between decentralized pastoral structures and the high centralization of the postcolonial model that concentrated its powers on urban structures was inevitable (Ahmed & Herbold, 1999a: 115). Nonetheless, this explanation also falls short. Theories advocating the failure of postcolonial model because it was imported are not convincing. There are instances of postcolonial african states like Kenya, Tanzania or Botswana that have demonstrated their ability to maintain stability. Although it should be taken into account the clash between pre-colonial structures and the postcolonial model as a plausible cause of state collapse. Furthermore, Abdillahi Bahdon refers to other factors like the complicated construction of the nation-state, the governmental legitimacy,

the modernization of society or the weakness of the national economy etc. (Bahdon, 2012b: 14).

Gutiérrez de Terán has also indicated that one of the reasons for the state collapse in Somalia was due to a 'hasty' reunification of Somalia. Due to the nationalist enthusiasm, British Somalia proclaimed its independence only four days before proceeding to union with Italian Somalia. This process took place without any previous project (Gutiérrez de Terán, 2011b: 17). Finally, Terrence Lyons referred to the state decomposition and its relation to the lack of popular support and legitimacy (Lyons, 1994: 46). This could explain why Somalia collapsed precisely at the beginning of 1991 and not before. Until the 1980s, the Siad Barre government had, with some exceptions, broad support from Somali society, especially for the irredentist program that promised the unification of all the Somali peoples. However, the consequences of the Ogaden War (1977-1978) produced a discontent that grew throughout the following decade.

Therefore, it could be said that postcolonial State in Somalia is one of the reasons that caused the dismemberment in 1991. Nevertheless, it can't be said that postcolonial state failed because it was a foreign model. Its maladjustment to local structures affected state institutions directly. In addition, it must not be forgotten that for two decades the Somali state maintained a certain stability. Only when the legitimacy of the government began to be questioned the postcolonial model began to crumble.

#### **4.2 Clans and opposing parties**

Traditionally, Somalia has been portrayed as country composed of peoples and 'tribes' with different identities that face each other. But contrary to traditional thoughts, this state is one of the most homogenous countries in Africa in terms of ethnicity (85% of the population identifies itself as Somali), religion (99% are Sunni Muslims) and language (85% of the population speaks the Somali language) In fact, Somali peoples are divided into clans, including the Darod, Dir, Isaaq, Hawiye, and Digil-Mirifle (Kimenyi, Mbaku & Moyo, 2010a: 1348-1349) Identities are not, however, only clan-attached. Race, language, status or socioeconomic divisions play a very important role. In addition, there are other realities outside the clan division that do not feel as somali people such as the descendants of merchants from Arabia or the inhabitants of the Juba valley, direct heirs of zigua slaves. Similarly, clan membership is not irrevocable, people may change their membership for protection, marriage, work or political reasons (Besteman, 1996: 123-124).

However, it will not be denied here that clans have clashed on different occasions throughout history, but neither is fair the image that has made the clan the only reason that led to Somalia's disintegration. It was combined with other factors. Thus, after the defeat of Somalia in the Ogaden War, Siad Barre had to face a coup d'état that, although dodged, had repercussions on the president's reaction. First of all, he was convinced of staying in power at any cost. He removed representatives of other clans from power in order to surround himself with trusted high officials and leaders from his sub-clan, the Marehan of the Darod. This set a dangerous precedent in the political development of Somalia, political grouping around clan origin (Robinson, 2016: 241).

Thereby, the different groups reacted by forming parties opposed to the regime. For instance, some of the Majerteen leaders of the failed coup d'état formed the so-called Somali Salvation Democratic Front (SSDF) with the support of the Ethiopian army. Other prominent clan movements were the Somali National Movement (SNM) founded by the Isaaqs or the United Somali Congress (USC) of the Hawiye. These political-military

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groups had a common goal, to overthrow Siad Barre's government (Ahmed et al., 1999b: 118-119).

Thus, by the end of 1989 the regime had been facing internal armed opposition for almost ten years and, in response to its attacks, it had punished the civilian population of its country by razing regions such as Mudug, Galgadug, Hiiran and the lower Shabelle regions (Ingiriis, 2012b: 67). By 1991 the general was deposed by the rebels of the United Somali Congress (USC) who appointed Al Mahdi Mohamed as head of state despite not controlling the entire territory. The divisions were not long in coming: its main opponent, Farah Aidid, did not recognize its legitimacy and declared war on him removing any possibility of maintaining a common government (Bahdon, 2012c: 20).

### **4.3 Somaliland and regional breakdown**

During the open war the SNM fought not only against Siad Barre but also for Somaliland's freedom. This region was the only one to declare unilateral independence in 1991, which led to an unprecedented state breakdown and a climate of total territorial dismemberment.

The roots of this secession can be traced back to the union of the two Somali colonies: the former British colony, known as Somaliland, in the north and the Italian colony of Somalia in the south. The enthusiasm to become one country led the Somalilanders to accept a number of conditions from the southern leaders like Mogadishu being capital and hosting the new Parliament. Thus, the Somalis of the South held the main government positions and most of the seats in the parliamentary assembly. Moreover, the government's development policies were unable to address the socio-economic problems of the North (Ahmed et al., 1999c: 116). Northern people were soon disappointed with this union, but the policy of Mogadishu's governments to try to unify all Somalis in one country deterred them from more pro-independence positions. However, after 1978 Siad Barre had to change his international stance and once irredentism had disappeared from the political landscape, Somaliland began its journey towards independence.

The main group that addressed this independent movement was the Somali National Movement (SNM), founded in 1981. The SNM gained followers in Somaliland, particularly among the Isaaq, who represented 70% of the population. Little by little they opposed Siad Barre until in 1988 they declared open war with the aim of liberating the region. The government's response, based on campaigns of terror and massive bombardments that ravaged the current capital, Hargeysa, eventually discredited Siad Barre's image. By 1991 the SNM was the hegemonic group in the region and the only political group capable to organize a new government. After Siad Barre was deposed unilateral independence was declared the 18th of May 1991 (Gutiérrez de Terán, 2011c: 22-23).

Although Somaliland was not recognized as a real independent state, the unilateral declaration of independence (UDI), created an impact on the social imaginary of Somalia, materializing the break-up of the state. Even at present, Somaliland independence is considered as the main impediment to Somalia's reunification.

### **4.4 Siad Barre's policies: corruption, repression and irredentism**

The policies developed by Siad Barre during his administration between 1969 and 1991 created the perfect breeding ground for state disintegration. It can even be said, in general terms, that the Siad Barre government ended up digging its own grave.

Firstly, Siad Barre's action upon his arrival in government was the dealing out of power shares among his closest allies. The president justified the plundering of the country through 'scientific socialism' by nationalizing access to land and water, as well as other means of production that fell to his own clan members and supporters. The economy was also declining gradually due to the country's mismanagement and the few economic measures put in place (Kimenyi et al., 2010b: 1349-1350). These measures, coupled with corruption, caused great discontent in the various regions of Somalia. The situation worsened when President Barre reinforced the presence in government of loyal members of his clan and some allies. As mentioned earlier, nepotism created a marginalization of power that led some clan members to rally around parties and guerrillas that tried to overthrow the Mogadishu government.

Secondly, the government's increasing repression of opponents created a climate of tension throughout the 1980s. Due to the stress of losing power Siad Barre pursued policies of oppression. This repression fuelled resentment among Somalis and fear to the state. Likewise, the policy of 'divide and rule' spread distrust among the clans (Menkhaus, 2007e: 78-79). All this affected the development of the country after the fall of Siad Barre, as this mistrust incapacitated the different opposition parties from forming a common front and creating a government of unity. Thus, many clan groups came to the conclusion that they could not rely on a central government, but depend on their own clan in terms of social and economic security and prosperity. In this way, many warlords became visible heads who provided the security that the state had ceased to provide years ago (Kimenyi et al., 2010c: 1350-1351). This facilitated the fragmentation of the country and the territorial control in the hands of so-called warlordism.

Finally, Siad Barre tried to carry out the Great Somalia project. The aim of this irredentist measure was to ensure that the Somali State, born in 1960, was joined by other regions where the majority of Somalis lived. This was the case of Djibouti, the Ogaden and Haud regions in Ethiopia and the North Frontier District (NFD) of Kenya. Irredentism became the main target for different Somali governments and it was even mandated in 1960 Somali Constitution: "The Somali Republic shall promote, by legal and peaceful means, the union of Somali territories and encourage solidarity among the peoples of the world, and in particular among African and Islamic peoples" (Constitution of Somalia, 1960)

But irredentism was not only an instrument that sought to unite all Somali peoples in the Horn of Africa. This policy has been used to ensure the control of Mogadishu over a cohesive Somali population. Thus, common enemies became the perfect pretext to divert attention from the country's internal problems. In addition, since independence some politicians supported irredentism to create a Greater Somalia only with the aim of diverting attention from the internal problems of the country, which were very numerous. Some did it to win popular support and legitimize their governments (Kendie, 2003: 76). Others did it because they really believed that once the dream of reunification was achieved, Somalia would move forward and become a regional power. Be that as it may, the fact is that the reiterative use of expansionist propaganda was a very useful tool to control crowds and keep the Somali people together. Siad Barre will exploit these strategies in order to unite a community that although they shared cultural, religious and linguistic features, only had been living under the same state over a decade ago.

Nonetheless, Somalia's defeat in 1978 marked a turning point in the application of this policy. No further irredentist measures were implemented although the 1979 Constitution recognized that the primary objective of the Democratic Republic of Somalia



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was to liberate all Somali territories and unite their peoples (Constitution of Somalia, 1979:7). For decades, irredentism had functioned as an instrument that united Somalis with a common goal. But once this goal became unattainable, nationalist ties and aspirations were weakened and it led to an inexorable dismemberment of national feeling. This process was reinforced in 1988 when the Somali government signed a peace treaty with Ethiopia. This agreement only widened the disappointment among all sectors of the country, spreading the idea that their own government had made a pact with Somalia's greatest enemy in order to gain time, stay in power and continue to oppress their own people.

### 5. Conclusion

Many conclusions could be drawn on this subject, but we will focus on the main ones. Firstly, when we talk about Somalia, we must put aside the great theories that claim that there is a 'major cause' for its disintegration in 1991. It is also necessary to set aside those ideas that give greater importance to external causes or internal causes separately.

Secondly, when we try to approach the reasons that made Somalia a Failed State, we must do so with a broad vision. It is not easy to explain why this country has been trying to rebuild itself for almost three decades. This is why it is so important to conduct a holistic analysis that explains correctly the causes that led Somalia into chaos and instability.

Everything is linked actually. The fall of the Siad Barre government can be explained by the international context since 1985, but this does not justify the fragmentation suffered in 1991. Other states suffered the same situation as Somalia, such as Ethiopia, but in just a few years they managed to recover state structures.

The disintegration of Somalia was therefore due to the international and regional context, but was also due to the post-colonial state model imposed since 1960. However, the end of this state cannot be understood without an analysis of the clan divisions of the opposition parties and the secession of Somaliland. At the same time these insurmountable divisions cannot be explained without a detailed study of the policies that Siad Barre regime has pursued since it came to power in 1969. Nepotism and corruption, the repression of the 1980s and the end of irredentist politics may explain the growing political, economic, social and identity dismemberment in Somalia. But again, these policies cannot be understood without an analysis of all the above factors, whether internal, external or regional.

All this factors explain the complexity situation that created the conditions for the total disintegration of Somalia in 1991. Likewise, if we want to holly understand this process it is essential to analyze one by one the roots that have converted Somalia in a Failed State.

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## ORIGINAL PAPER

# The Crisis of Culture in the Post-Communism Transition

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### Abstract:

After 1989, there was a reform in the Romanian society that caused significant tension both at the political level and in the economic and cultural system. The characteristic transformations for the cultural phenomenon are: the aspiration for the restoration of authentic values and the regaining of the creation freedom. Changes in cultural space are closely related to those in the political space. Within the cultural environment, in the transition period, the communist regime and cultural reconstruction projects prevail.

There have been critical interpretations of the culture of the communist period: accusations and culpability on some representatives of Romanian culture; descriptions of the malfunctioning of cultural institutions. There have been debates on the meaning of cultural resistance term during the totalitarian regime. Concerning some assertions about diffuse collaboration and support for the communist regime, there were different invitations to represent a form of passive resistances by cultural personalities, manifested by refusal to write under control.

Among the culture people, a climate of suspicion and accusation prevailed and it generated by the idea of a communist process. In the Romanian culture, during the transition, there were confrontations, problems which remained diffuse, un-clarified or analyzed and reinterpreted. In some publications, significant topics related to establishing the truth and reconstructing the correct image of the past were analyzed. The relationship between national identity and European integration has been widely debated in cultural and intellectual environments.

**Keywords:** *cultural phenomenon, reform, reconstruction, cultural institutions, transition*

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### **The theoretical framework of the problem**

Any change that profoundly changes the course of civilization, in particular, any change that intervenes in the economic support, is accompanied by a reversal and a decline in the cultural values. But, driven by the inertia of the old cultural patterns, the traditional types of reaction manage to maintain themselves. This lack of adaptation of traditional responses to the new conditions is accompanied by a certain anxiety which the most conscious individuals may feel as a fundamental failure of culture. Certain anti-communist circles insisted, in the first years after the 1989 Revolution, for a “communist process” as an ideology, considering it a totalitarian and inhuman system. This process was for some vigilantes a broad spectrum that concerned the compromises made by some writers and cultured people with the communist regime. Thus, there were tendencies of critical review of the works of some writers who were considered to have a positive attitude towards the communist regime. If strictly political criteria of review were used, the value of the works would have risked moving to the second level.

Going through a long process of clarification and redefinition, the Romanian culture has undergone some actions to recover the values under the communist regime’s prohibition or carried out by the ideological criteria of this regime. Thus, at a gradual pace, the cultural values board has been revised and a new internal structure has been granted. This reconstitution of cultural values began with the massive restitution and the apology of the right-wing culture of the interwar period, some culture people wondering if we “change the left-wing culture to the right? It seems so in some clues.” (Mariano, 1995: 144).

The republication of some authors’ works from the interwar period was considered to have contradictory effects as for the right culture, the dominant values were: the refusal of political pluralism and parliamentary democracy, the mesianism, the rejection of relationalism and the fundamentalist spirit, the eulogy of the nationalist, traditionalist, xenophobic accents, etc. In the opinion of some intellectuals, “These authors are anything but they haven’t been and can’t be great teachers of democracy, pluralism and liberalism. In this respect, they can not constitute our democratic, central cultural landmarks.” (Mariano, 1995: 145)

The authentic democracy was considered to be based on the center culture that has its own merits: the priority given to the freedom and dignity of the individual (not the collectivity), the liberal, democratic, pluralist, rationalist, individualist and European conception.

### **Political determinations of the culture crisis**

During the transition, there was a review of the significance of historical moments and events as a result of the deformations produced by the communist ideology over national history. Important documents that were previously inaccessible to events or personalities of political and cultural life were made known.

Many valuable authors could not publish their works during the communist regime, the reader audience had no access to their creations. Other authors have been interpreted in a defamatory manner, and others without scope have been oversized in meaning.

Considering all these aspects, the values of the Romanian culture had to be reconsidered, reconsidering the contribution of some personalities, according to the new

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data, to the development of the scientific, artistic and philosophical life in the contemporary age.

In the view of some authors, the meanings of these statements expand, and “it is often enough to claim that any act of culture, under the old regime, constituted an act of resistance” (Mariano, 1996: 29). Sometimes this formula is also a shelter for “those who have benefited from the graces of the regime, and for those who have suffered because of it” (Mungiu, 1995: 64).

There were the intellectuals’ tendencies to be in possession of certificates of litigants or dissidents, being accused of the practice of intellectual disinterest and lack of interest in serious social problems. Some of them considered this practice as an “invented phrase to designate the natural, not polarized, activities of the cultural elite, but many crypto-laborers have served to excuse their cowardice during the communist regime”. (Mungiu, 1995: 64)

Cultural institutions depoliticizing has led to the opposite effect, so: “At the beginning of 1990, students demanded that the university should surrender the truth, not make politics” (Simion, 1996: 134)

Some academics said the following: “I draw attention to the fact that we are witnessing a new mystification in culture... the tendency is that the Stalinist era be removed from the discussion, although the prisoners were full of intellectuals.” (Simion, 1992: 138)” (Simion, 1992: 138).

Some intellectuals have advocated such a process: “ It must have been clear, from the outset, that we do not need reprisals, but the punishment, according to the law, of those who committed crimes.” (Paler, 1993: 165).

In underdeveloped societies, modernization cannot take place without producing a social culture. A distinction must be made between economic growth (technological accumulation, efficiency, etc.) and social development (a concept that engages all the structures of a society). Modern development involves a new inner culture, a change of the inner values, of the mental foundations on which a cultural pattern, the value system, the means of expression, etc. emerge. Because culture is structurally and functionally involved in a society, an appropriate cultural paradigm is needed.

An analysis of the Romanian culture can generate controversy and confrontation of ideas in intellectual, political, media and specialized publications. The cultural fields of science, literature, art, philosophy, or political thought must be analyzed with the responsibility of presenting reality to the past.

Young people must have a system of orientation and interpretation of the Romanian spirit that is as concrete as possible at this moment and in which there are these divergent points about the Romanian culture’s personalities, about Romania’s reporting on Europe, about the Romanian cultural identity and the integration our country in the European and Euro-Atlantic structures.

In each society, culture at the same time corresponds to a particular way of living, thinking, acting, of an original form of civilization in a given society, in a group or in an individual, and of a dialectical movement between material transformations and voluntary changes have also been made. In this movement, the group or the individual brings its active and constructive part into the daily practice in transforming the society and its civilization. Without a value-creating culture, the civilization, fixed in rigid and nonrenewable structures, is doomed to death.

### **National Identity and European Integration Process**

It is necessary to form an adequate, lucid, critical image of the national identity by reporting the works and personalities from the Romanian culture to the domestic socio-historical context and to the European cultural context.

There were concerns about the recovery of the phrase of *national idea*, compromised by the communist regime and its interpretation in its rational meaning.

Intellectuals are of the view that integration into European structures would contribute to the alleviation of national identities in favor of a European identity. Others argue that national values should be less concerned, as it would be important to assimilate institutional standards and European standards. The interest for national culture is interpreted as a nationalist and anti-occidental position.

There have also been interpretations of intellectuals about the national idea, conducted unilaterally, distorted, based on excessive assertions. Depending on the attitudes expressed in the published works on the national idea and the different representations on European integration, the cultural environment has been divided. There have been tendencies of culpability of the national sentiment and the national idea, on the part of the exponents of the European Union, the frenzied supporters of integration, with the slogan of entering Europe.

They felt that the national feeling and the national idea had been compromised by the communist regime and no longer had a major significance in the world of interdependencies and regional and world integration. Thus, they criticized the intellectuals rationally and critically attached to the national idea, seduced by patriot and xenophobic rhetoric. They considered them anti-reformists, conservatives, crypto-communists, exponents of national-communism, statements made in the media.

These phenomena have opened up the opposition between the intellectual, democratic, cosmopolitan, pro-Western elite and intellectuals attached to national ideals, to the specific background of culture. The same phenomenon happened in all Eastern countries. Integration debates have updated a central issue in modern Romanian culture, that of the tensions between universality and national identity, between the metropolis and the periphery in European evolution, between national realities and new geopolitical contexts.

Regarding the issue of reintegration, there have been debates on overcoming disability for so many decades of isolation. Comparative analyzes in this sense have led to rediscovering the historical gap with developed Western societies, rediscovering our "historical and peripheries" (Cucos, 2000: 38). There was a sense of frustration and inferiority complex by the precarious economic state due to the failures of the reform and other anomalies of the post-communist transition. There have been nationalist self-clustering reactions, even if political and cultural groups have this attitude. This relapse in a fatalistic mentality was determined by the critical urge and the perception of our identity in negative terms. Integration has been an opportunity to thoroughly examine Romanian culture from the point of view of its identity, using radical terms and finding answers to the new challenges of history.

The issue of entry into Europe was followed by political commitments, which led to disjunctive interpretation, considering European integration compatible with the national idea and the promotion of national values. The recovery of national identity, after the totalitarian regime, has sometimes been erroneously interpreted as an anti-European

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attitude. The distortion of the idea of national identity and the recovery of its authentic sense were incriminated from the new perspective of democratic reconstruction and synchronization with the European institutions and with the requirements of integration.

Opinions have emerged that consider accession to the European Union as an emphasis on national values, but also opinions that reject integration precisely because it would mean the abandonment of national traditions and specificities. This disjunctive paradigm has been taken over from classical rationalism and sociologically resized by the ideologies of globalization. In this sense, most people understood that integration would involve forgetting national traditions and values, forgetting the flagrant injustice that the Romanian people suffered after the Second World War.

This anti-human vision has led to the misunderstanding that a traditional and critical conscience of national identity is not an obstacle, but a condition of European integration. The disputes between intellectuals who appreciate integration as being only possible by diminishing or forgetting our identity were reopened, with legislative, institutional harmonization and the remodeling of the economic system according to the requirements of the European Union, and those who thought Romania's integration could be the result of values specific cultures that legitimate existence and identity.

Such debates and exposures existed in the press at that time. Between 1995 and 1996, Gabriel Andreescu, an exponent of the Social Dialogue and 22 Dialogue Group, Alexandru Paleologu and Octavian Paler, expressed their well-individualized positions on the issue of Romania's integration into the European Union (Paler, 1996: 12).

The last two great intellectuals, opponents of moderate or decent nationalism, said that there are no Europeans out of nowhere, European quality does not invalidate national affiliation. European integration was opposed to the national idea, in some simplistic representations, as though this integration process required the renunciation of national affiliations so as to become "the Europeans of nowhere-procedure abusively and insidiously used by the term nationalism to respond to an allergy more difficult to recognize, namely national, national identity, national state, etc." (Paler, 1996: 7).

During the transition period, certain extreme positions have found expression in the beneficial effects of globalization, underestimating national values and adopting narrow and anti-Western nationalist attitudes.

The considerations of some intellectuals about these extreme positions were that "The interest in the consolidation of our European path does not seem to be a concern to clear the national trajectory." (Ulici, 1996: 75). The author clarifies the terms of the debate by delimiting the plans. Thus, ideologically there are disjunctions between Europeanism and nationalism as unilateral positions, and on the anthropological and historical plane, it speaks of the European and national complementary.

The displacement of ideological discussions in the historical and anthropological plan leads to the alleviation of the tensions and impose a new vision on the integration process which does not exclude the two national and European terms. Thus, integration into institutional Europe and the assertion of national identity have become connective. At present, Romania belongs structurally to Europe's civilization space, its defining values and its entire evolution towards modernity. The national feeling is solidarity with the feeling of natural belonging to this space. The recovery of national identity, its reinterpretation, integration and support were consistent with the vision that the positive evolution of Romania in the coming decades is related to the process of integration into European structures.

Destinations that saw the European Union as a construction that would lead to the dissolution of nations and identities were destroyed. Monetary unification, the coordination of economic programs, common foreign policies and the existence of community political institutions have not led to the diminishing of national identities. Thus, the countries that are part of the European Union have not lost their identity but have redefined it in a new context.

There are also attitudes to supporting the construction of the European Union, preserving cultural identities as a wealth of the continent, in a climate of tolerance, collaboration and multiple cultural interferences. Balanced and rational attitudes would be the preservation and cultivation of identities, their defense against the invasion of the consumer culture emerging as a result of globalization and leading to the deconstruction of nations.

*The relationship between culture and civilization* can be addressed by considering culture as a system of values and civilization as the system of goods in which these values are found and expressed. Culture is the spiritual component, and civilization is the material component of a society. These can be analyzed in the process of cultural integration and differentiation, cultural globalization and cultural identity of societies.

Having in their core a system of beliefs, attitudes, values, differentiated options, “cultures always appear in the plural; they establish identities (individual or of group, ethnic or national).” (Malița, 1998: 55) Civilization has a universal vocation, it contains technical means by which the societies ensure their material preservation and historical development.

Until extensive and rigorous politological and historiographical studies, the “European idea” needed affirmation and dissemination, clarification and consolidation, solidarity and deepening in as many Romanian receptive knowledge as possible. It was necessary to discuss methodologically the “European idea” in its triple dimension: cultural-literary, ideological and political, as reflected in the current Romanian culture and realities.

Three intellectual attitudes can be expected: a permanent connection to European values, ideas and culture; the most serious European documentation (libraries, university studies, museums, etc.); cultural achievements at European level (as writing and value), in the Romanian environment, by Romanian culture people. “Bringing Europe home”, by our own Romanian-European creations means to raise ourselves to the standards and conditions of European reception and circulation, so our own Romanian creations will become “European values” as well.

The true Romanian creator has never had complexities of inferiority or superiority, and if we create solid, durable, fundamentally we will have what we offer and effective presence to Europe. This European cultural integration, doubled by the assumption of the spiritual identity of the Romanian people, began to intensify.

Looking deep, beyond the external factors, the key to the European integration problem is Romania. Also, the psychological factors of blockage, rejection or “docile” alienation and lacking of personality are very important. We cannot overlook any irritating attitudes of the Western “complex of superiority”.

After the fall of communism, in Romania there is an explosion which sometimes that cannot be controlled, of differences, different and contradictory speeches. Minorities manifest themselves by demanding their rights.



## The Crisis of Culture in the Post-Communism Transition

### Transition and the crisis of culture

The democratic climate after 1989 led to a radical change in the political condition of culture, but at the same time, culture is facing economic hardship. With the occasion of the Cultural Forum in 1997, various views on the cultural evolution of the post-communist era were expressed. One of these points of view was that there is no “crisis of culture” in terms of creation, but a crisis in the administration of culture.

“What we have lived so far is a poor management of the cultural gesture. We are not in a crisis of culture. It’s an assertion that was misused if we take into account editorial appearances, international tournaments ...” (Caramitru, 1977: 11).

There were also points of view that “Seven years in Romania the indifference of politicians has perfected what has ruined ideology (the former regime) ... I think there is a crisis of culture and not only in us but in the world” (Paler, 1997: 111).

An approach to culture should be done not only on the administrative, accounting, but also on the spiritual trends and orientations, the cultural responses and the challenges of that time.

In the view of some intellectuals, culture should be regarded as a fundamental element of national identity, in the analysis with the historical phase in which we are also in the process of globalization and integration: “A country can lose its identity in two ways: disintegrating territorially and disintegrating spiritually. At the level of the political class, there is only talk about the economy (...) .” (Paler, 1997: 3).

Insisting on the significance of culture in the identity of a people, the same author (Paler, 1997: 3) appreciated the defense of culture as just as important as defending the national territory. Political and economic systems are evolving towards integration, while the phenomena of interference and cultural lending are multiplied. Culture cannot escape the flow of value-for-money, as instruments of cultural disintegration, to deprive societies of a fundamental factor of social integration.

Within the culture there are changes in values, transformations of social mentalities and practical behaviors. One cannot neglect: the phenomenon of the expansion of consumer culture during this transition period, the shift of cultural preferences towards poor quality products, industrial entertainment offered on a mass scale; diversification of commercial televisions. They were interested in audience, mediated media consumers with soap operas, violent films etc.

Some intellectuals consider the phenomenon of the crisis of culture as the most serious disease of the transition, saying: “After 1989, freedom quickly turned into chaos. (...) A subculture without frontiers - that is what the transitional period offers us. The difference between culture and subculture makes it a critical spirit” (Manolescu, 1999: 11).

The Romanian experience in industrialization, social mobility and, in particular, emigration offers a fertile field of analysis. Especially in terms of the resilience capacity of the spiritual symbols that circumscribe cultural values in the face of aggressive penetration and pressure of some systems of foreign norms and cultural values. The structural features of Romanian culture: historicity, natural vision, communion with the cosmic laws, the deep sense of ethics etc., have begun to be seriously threatened by an unsatisfied vital need: the uncertainty of tomorrow.

A similar situation, albeit more dramatic, is found in the Romanian emigrant’s psychology. Receiving in the family a dual, conflictual education, the deduction of their

behavior is supported in social life by dual cultural norms and values: the values of the Romanian culture are not deserved because they are falsified by the demagogy of our public life, while only the values of Western democracy a genuine framework for fulfilling his personality. So, the future Romanian emigrant socializes in this internal cultural conflict, but on a false basis.

The cultural picture of an era is given by the achievements from the scientific plane, the artistic movements, the evolution of the literary styles, the giving of the right place of the Romanian thinking in the education system.

The issues we should be concerned about are: How does the young generation relate to the culture of national culture? To what extent are traditions known to them? Is the present Romanian society preoccupied with shaping another destiny, integrated in European structures, still interested in the cultural past?

In contemporary society, as a result of globalization, cultural identities are not canceled, but must be redefined in a world that has become global, polycentric. Cultural identities can be strengthened through profound creation and competitive participation by asserting them in universal space.

Cultures are products of companies, groups, express values, ideas, behavior patterns. These are assimilated by social groups and found in institutions, attitudes, behaviors and social relationships. Social agents are trained and shaped by cultural elements, values, languages, knowledge and practical patterns.

During this period, social communication of values and communication between cultures through the media system intensified in Romanian society. Thus, there are cultural interferences, connections and exchanges of cultural values. There is a clear link between unity and diversity. Globalization does not destroy the interest of cultures for their spiritual identity, but national cultures are considered to be integrated into the vast circuit of intercultural communication.

The Romanian transition society is characterized by a mixture of styles, abandoning the great political and artistic ideologies, the disappearance of the border between culture and elite and the popular one, the expansion of consumer culture and the entertainment industries. The Romanian cultural creation has a polycentric character, it presents a diversity of forms and creation centers.

During the transition period, we are witnessing a wake-up to reality and a change in the value points that determine the phenomenon of identity confusion, of hardly accepting our own limits and deficiencies in the process of approaching the one that is different. Getting used to what is homogeneous in communist times has led to hardly accepting something that is more or less than ourselves. Many individuals are guilty of their attitude of open support to the old communist regime.

After 1989, the groups are sometimes indiscriminately multiplied, which proves lack of maturity or even naivety. Unbounded freedom has generated a multitude of divisions: political parties constituted by unjustified criteria; cultural groups that promote the same rights but do not recognize each other. These issues lead to overcapacity and overcrowding, creating a chaotic and multicultural society, the intercultural dimension failing.

According to some authors (Bîrzea, 1994, pp. 17-19), the transition from a totalitarian society to a democratic society led to a state of crisis, anomie, caused by the annihilation of the state and the communist party, of the repressive apparatus of the disappearance of the paternalism of the almighty state, the paradoxical coexistence of the

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new structures with the old ones, the social structural remnants and the capitalist forms of social regulation.

### **Conclusions**

The sum of values of a particular culture allows the grouping of value orientations, which serves to appreciate the actions and the formation of cultural activities through institutions and statutes, allows the creation of a general order of rules by which members of the same culture and community tend towards the same values, a common life and maintains their cultural community.

Cultural norms are over-individual and over-grouping and, as such, as any cultural element, can stretch in space and time. Cultural rules are transmitted or learned through culture. By learning the rules of their own culture, people regard them as normal, and abnormal strangers, unnatural. Each community has its rules, as well as rules and institutions for the transmission and learning of rules, as well as institutions and rules for the maintenance of cultural rules. Failure to rules in a community calls into question the existence of the community, the life inside it.

The cultural work is a work of brotherhood. To the extent that value remains immanent to consciousness, they remain strange to others, even though they share the same value, even if each value develops in them in the same ways. Through cultural action people establish a simultaneous essential and permanent connection. Truth is never a truth if it is a truth for me alone; the beautiful is never beautiful if it is beautiful only for me. "The value is not only for the individual, it belongs to the community. Hence, people's desire to persuade their peers to participate in their axiological universe". (Smith, 1995: 198)

Culture is an appeal to all people to overcome the constraints of space and time in search of unity, and also an appeal to overcome individual, universal and essential differences. It was necessary for the inevitable transfer of sovereignty to the European institutions at the level of certain decisions to be analyzed realistically and pragmatically, in order not to leave the place of insinuation of reservations and fears about a possible dissolution of the Romanian national identity as a result of Romania's integration into the European Union.

Contemporary age is characterized by social progress due to the cultural environment that builds specific institutions with gradual relative independence. Culture in today's social contexts imposes specific criteria of homologation of values through the multitude of forms of expression, professionalizes, becomes a specific area of competence and creation.

The Romanian culture, developing in particular social and historical conditions, must also relate to the stages of Western cultures. Intellectuals are sometimes subject to circumstances requiring them to carry out routine activities, take on political, administrative, educational, journalistic or diplomatic tasks. Their creative activity is thus interrupted, fragmented, lacking the necessary continuity in the work of research and spiritual construction.

The Romanian creators were confronted with the problem of the delay of the development of the Romanian society and with the tasks related to the accelerated modernization. A culture needs good conditions to develop original thinking systems or artistic works.

In our age, the cultural dimension of development has become increasingly apparent. Development is a cultural, not only economic and technological process.

Western societies have been propelled into the avant-garde of contemporary civilization and the density of cultural (especially scientific) creation.

In underdeveloped societies, modernization cannot take place without producing a social culture. A distinction must be made between economic growth (technological accumulation, efficiency, etc.) and social development (a concept that engages all the structures of a society). Modern development involves a new inner culture, a change of the inner values, of the mental foundations on which a cultural pattern, the value system, the means of expression, etc. emerge. Because culture is structurally and functionally involved in a society, an appropriate cultural paradigm is needed.

The type of culture influences the development of a society, helps it or delays it. The quality of the education system is of great importance for any society engaged in development, ensuring the transmission of accumulated experience, scientific heritage, practical and civic behavioral patterns. Non-economic indicators of social development regarding education, access to information and knowledge highlight the fact that social development is dependent on the use of information, the transition to a “supra-symbolic economy” (Toffler, 1994, p. 70) where the use of knowledge and communication counts mostly. Romanian society faces these challenges due to the fundamental changes in the current civilization.

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## ORIGINAL PAPER

# Management of Learning Time and Free Time Education for Students

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**Abstract:**

Current paper presents various ways for a good time management in academic learning, having as a prerequisite that it is an abstract resource, hard to control it, but with an essential impact on student life. In general, the modern man is increasingly busy, with a gap between the number of activities he wants to accomplish and the ability to accomplish them timely, without stress. Along with passing from high school and higher education, young students find themselves in a position to restructure their way of using the time resource and also other related resources, thus becoming more organized, with an impact on the practical accomplishment of activities. In the case of academic environment, for the students involved in the educational process, the sources of stress are either at the level of learning context: people in the close group or certain teachers, the membership in several groups, the competition with the equals, the tense relations with the decision-makers, the changes at the level of the system, institution, various events in the social life, or at the level of learning activity itself: the nature of tasks, their volume, their difficulty, the existence of deadlines, the limitations, the learning conditions, the unjustified rules and habits, the ambiguity of roles, their attributions. Our analyzes highlight the internal and external causes of the non-productivity, and the application of certain solutions, techniques and tools only works in an individualized way, by applying metacognition. Planning, performing actions, checking and adjusting results are the main stages of self-management. Therefore, the study seeks to outline several efficient action principles that are useful both for learners and for trainers/guidance practitioners. Consequently, we advocate for quality leisure time education, which is currently an important axis of personal development by regenerating, compensating or developing bio-psycho-social functions.

**Keywords:** *time; students; management; learning; efficiency*

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### Learning to students

The academic learning enhances and continues the school learning, being a new behavioral acquisition process as a result of the internalization of external experience. At the level of higher education there is a maximum of the use of the learning potential, imposed both by the differences between the university education and the pre-university education, and especially by the characteristics of personality development during the youth or adulthood.

In general, the learning process stages include: A) training for learning; B) receiving and recording the material based on a background of cerebral attention; C) understanding and generalization through the formation of notions and principles; D) fixing in memory, keeping in time and storing information; E) updating by reproduction and transfer of learned elements.

The specificity of students learning is given by the development of motivation/willingness to learn independently and to control their own learning activity, starting from the assumption of objectives and tasks. But this tendency to acquire autonomy does not exclude interactive learning, the best learning experiences being integrative and collaborative developed (Suskie, 2018: 15). Then, there is the support, the constant and thorough development of study concerns and the implementation of the logical, analytical, critical thinking capacities. The status of people who choose a particular academic and professional specialization contributes to stabilize the aware, organized, responsible learning.

As a result of our own studies on the student who learn (Frăsineanu, 2014: 151), we have found that students succeed in increasing the learning efficiency if they apply a self-management learning program. In such program they practice: a) Elaboration of a personal study plan: establishment of study stages, objectives and priorities, identification of temporal, spatial, material resources; b) Applying the personal study plan; c) Capitalization on the learning led by teacher, cooperation with other students: making good notes; focusing the attention in class; empathizing with teachers and colleagues; d) Use of non-formal and informal contexts in learning; e) Capitalizing on the past experience; f) Understanding the obstacles to learning and taking steps to overcome them, identifying people who can provide support in learning and receiving advice; g) Creating a climate that encourages learning, self-motivation for and in learning; h) Determining the degree of difficulty of the material to be taught; synthesis, selection of learning material; organizing the material to be taught; definition and correct use of fundamental notions (key concepts), solving practical problems, making connections between theory and practice; i) Concentrating, maintaining attention during learning, dosing the learning effort; j) Compliance with the established deadlines; k) Self-check, knowledge of qualities and defects in learning activity; l) Training (intellectual, motivational, emotional, attitudinal) to take the exams, which involves the reduction of anxiety, the self-encouragement, the emotional self-control; m) The use of learning, by practicing the lessons learned; n) Assessing the efficacy and efficiency of the study plan and its improvement.

### **Competencies for a better (self) organization**

The competence is defined (De Ketele, cited by Manolescu, 2004) as the ability to mobilize, meaning to identify, combine and activate a set of knowledge, abilities, attitudes, to solve a family of problem situations.

The learning to students acquires the quality of being self-organized by the fact that, in the learning process, the students establish their own goals, contents, ways of learning and assessment. The self-organized learning makes the learner responsible for the use of resources and learning, detailing the actions, situations, operations, tasks, roles that he/she will accomplish. It follows the planning of learning and is continued through the self-management and self-regulation of learning.

The self-organized learners have "the capacity to realistically identify the available resources, to define their own learning goals in relation to these resources, whether the process is done naturally or is organized by institutions" (Augustein, Thomas, 1985, cited by Mamali, 1987: 66).

After Knowles (1985), the self-organization of learning is synonymous with the individual management in the field of learning projects; Candy (1991) shows that the term designates: the concern of learner to use the emerged opportunities, without institutional support, the control exercised by the learner and the personal autonomy.

In the academic learning, an important role is played by the self-regulated learning - studied among others by Zimmerman, Schunk (1989) and Winne (1995). Zimmerman (1989: 4) considered that the self-regulated learning occurs at those students who are active participants from behavioral, motivational and metacognitive point of view, in the learning process. The process of self-regulation implies the perception of the personal competence and efficiency, which interferes with the adjustment of the effort, persistence or options. The self-regulation (Bandura, 1997, cited by Negovan, 2004: 66-67) can be done by: anticipating the consequences; goals structuring; moving attention to other activities; increasing the efficiency and includes the autonomous formulation of goals, the self-assessment of performances and self-improvement of responses. It is given by the ability to set realistic goals, to select, modify, to implement strategies and tactics of action.

Thus, the self-regulation requires the self-monitoring, self-assessment, self-improvement. The self-monitoring consists in knowing the level of the understanding of information and in delivering solutions for improvement, and the self-reinforcement is learned through the awareness of the relationship between the effort and the success in achieving realistic goals, as shown Negovan (2004: 112).

An interesting model of self-regulation is the Zimmerman's cyclic model (1989), which includes: the preparatory phase (with the objectives planning, perceiving the personal efficacy and expected benefits), the performance phase (with the application of the self-learning strategies, the organization of the environment, time management), the self-reflection phase (where the self-assessment strategies, especially the assessment of the level of own satisfaction) are applied.

When analyzing the learning abilities, we shall take into account the differences between the young students and adult students. For example, the perception of time for an adult is different compared to the young people, meaning that the adults consider the investment in time as very important, while the students do not have the same perception but are more anxious. The adult's life and professional experience is larger, more diverse, organized differently, and this aspect gives him/her an advantage in learning.



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The learning competence of students results from the capitalization on the aspects involved in the management of their own learning: the regulation of planning, especially the correct, precise setting of the objectives; time allocation; rationalization in decision-making, organization of learning activities, self-assessment by reference to external criteria, but also to efficiency, efficacy, requirements-possibilities ratio. Some authors (McLoughlin, Marshall, 2000) synthesize the skills that demonstrate clearly that a student has learned how to learn: the independent planning and study; formulating goals and adjusting time to meet demands.

### **Learning Resources**

All the instruction resources, as an interaction among teaching-learning-assessment, become resources that could be used by students.

As internal resources, the psychic processes and phenomena (the perception, representation, thinking, language, memory, imagination, skills, creativity, motivation, attention, will) or the personality components (temperament, character, aptitudes) interfere with and support the learning phases, the understanding and transfer especially.

In addition to the internal resources, the learners use also external resources:

- human resources;

They are the most important. As human resources we may name the teachers, colleagues, parents, other human factors that exist in the institutionalized, academic environment or outside of it). The interactions help to capitalize on the learning abilities, support the active and interactive learning and, above all, influence the motivation of learning, sustaining the effort.

- value resources, close related to the goals of the academic study program;
- space-material resources - by that we understand the existing facilities (adequate space, temperature, lighting, ventilation, information sources, appliances, consumables, etc.), which must provide the learning conditions or a climate favorable to learning as ergonomic requirements;
- informational and content resources related to the characteristics of the material learned, the nature of the discipline;
- teaching resources (educational means) that will be methodically integrated to support learning;
- time resource.

Although the students have a high degree of autonomy when learning, we appreciate that more than being managed, the time is co-managed by setting the activities, setting certain deadlines, selecting, balancing, allocating time, creating conditions for participation by the interdependency with their teachers, other colleagues, or other people with whom they interact closely.

### **The time – abstract resource**

From an economic point of view, the time is considered a precious, pretentious, irreversible, perishable, inelastic, impersonal resource (Corodeanu, 2006).

In the field of ergonomics of learning, the indications for an efficient use of learning time refer to: the suitability to individual biorhythm and the daily curve of intellectual effort; the global analysis of the study material, the implementation of the priority tasks, the implementation of a strategy to prevent the overloading, by starting tasks timely (recommended action, by the teachers usually and sporadically done by some students), planning certain time-adequate study sessions considering the own effort capacity,

preliminary understanding of the contents, the integration of the newly learned elements in known contexts, and diversification of relaxation ways. This last action is most often used, given its natural and pleasant character, to the same extent.

The difficulties in the time planning are overcome by students by studying immediately after courses, by realistic planning of the activities during the week, by achieving a study agenda that is respected.

### **Time management arguments**

#### **I. The time management ground: reducing stress**

A poor time management is closely related to the emergence of tiredness and stress in learning, therefore, the learning time management involves hierarchies, choices between important and less important actions to maintain a balance between the learning capacity and learning outcomes.

The stress manifests itself as an imbalance of the human body, caused by its inability to deal with the demands exerted on it. It can be functional, in which case it has a motivating role, manifesting itself briefly - and dysfunctional, in the situation when it disorganizes the activity, manifesting in the long run.

The subjective nature of stress is determined by the fact that the stress is a complex psychosocial phenomenon that results from a person's confrontation with demands, tasks, situations that are perceived as difficult, painful or of great importance to the person (Băban, 2008). The reaction to stress depends on each person, because, from a psychological perspective, the stress is a particular relationship between the person and the environment where the person assesses the environment as imposing demands that go beyond their own resources and threaten their well-being. This assessment triggers the copying strategies: the cognitive, emotional and behavioral responses to the feedback received (Lazarus, 2001).

The sources of stress are: at the level of the context of learning: the people in the close group or certain teachers, the membership in several groups, the competition with the equals, the tense relations with the decision-makers, the changes occurring at the level of the system, institution, various events in the social life; at the level of the learning activity itself: the nature of tasks, the volume, the difficulty, the existence of deadlines, the limitations, the agglomeration of the tasks (the time crisis), the insufficiency of the learning conditions, the unjustified rules and habits, the ambiguity of the roles and so on.

Several authors such as Mintzberg, 1973; Stalk, Hout, 1990; Vinton, Kahn, Byasiere, 1992 (cited by Whetten, Cameron, 2002: 113) have indicated among the stress sources certain factors closely related to time: the overwhelming work, the loss of control.

The effects of stress are manifested by deteriorating the health; increasing coffee, sweets consumption; excessive smoking; over-feeding or decreased appetite; installing insomnia, feeling of fear; the manifestation of the isolation trend, of the sense of guilt, the inability to make decisions, to focus; the appearance of anxiety, apathy, nerve depression, aggression or irritability. The solutions in such cases come from the self-knowledge and self-acceptance, the correct perception of the reality and the others, from clarifying and defining the essential values, clarifying the future projects, organizing and monitoring their own activities, expressing assertive attitudes, using physical relaxation techniques, mental control, physical exercise.

The stress management starts with the awareness or knowledge of the sources of stress and the reactions that show its presence and reaches the action on the causes or effects by developing the assertiveness, communication, improving self-esteem, conflict

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resolution, task fulfillment, decision making, time management, application of certain relaxation techniques, the identification of an adequate social support, the development of a healthy, balanced lifestyle.

II. The reason of time management: Getting output or eliminating the unproductiveness (causes)

The time management by students helps them to establish and separate the academic tasks from those in everyday life. They achieve their goals and thus overcome the obstacles inherent in any field. Moreover, it forms a system of rational, disciplined conduct, to act successfully and in time, to capitalize on opportunities, to use control over the personal psychic, to acquire a sense of fulfillment, to evaluate the progress, and last but not least, to maintain excellent relationships in academia, family and society. However, it can not be planned all the time, because we shall accept that there are events that do not depend on us.

The efficiency, understood also as the productivity room or the performance, designates the results obtained by a student in an optimal time and under normal conditions of activity. The efficiency and rationality of a student's activity can be reported by calculating an index of learning productivity as a ratio between the dynamics of results and the dynamics of efforts or even the dynamics of learning time.

The detection of the non-productiveness in the matter of the time management is a metacognitive process. White, Frederiksen (1998, cited by Cerghit, 2002) considered the metacognition a monitor of the consciously progress, while Noel (2001) drew the attention to the necessity of realizing a realistic meta-cognition, proposing a metacognitive optimum from which the error of sub- or over-appreciation is eliminated. Schunk (1991) identifies a direct relationship between the metacognition and self-regulation, the latter being composed of: self-observation, self-judgment, self-reaction.

Moreover, the knowledge and, above all, the self-monitoring and behavioral self-regulation are necessary because they subsume to the functioning of some laws, principles and rules existing in learning (Mureșan, 1990; Neacșu, 1990, 1999, 2006): the step-by-step learning is more efficient than the merged learning; the long breaks are good for learning a difficult material, therefore, shorter breaks are recommended at the beginning and after increasingly longer; at the beginning of the learning, the yield increases and then gradually decreases; the learning time increases to a greater extent than the volume of material; after an intense learning, a state of inactivity, active rest or sleep is recommended, and if, after such learning there is another activity that poses a strong interest to the student, then the learning efficiency of the previous material decreases; in the situations of the retroactive braking, it is necessary to succeed different contents among them, using different learning methods, in order to avoid confusions.

The risks or the unproductiveness in learning time management are: the inconsistency: frequent changes of the concept and proposition of new directions; switching from one task to another; initiating multiple projects at the same time, but they are incomplete at different stages; impulsive actions, without taking into account the consequences; engaging in new tasks before finishing the old ones; unsuccessful in trying to do many things simultaneously, an inconvenience of the multitasking (Harper, 2018); inefficient strategies: the lack of planning; the concern for a great deal of documentation and for records/monitoring; the delay of actions under the pretext of the need for information; the loss of time by analyzing data to an unjustified extent; the too detailed approach, disregarding the urgency of the situation; unproductive attitudes: too much involvement in the social life and finding out about opinions; exaggerated concern about

their own social image; giving up the responsibilities; the non-critical acceptance of the new; taking too many tasks, based on an exaggerated optimism; the excessive focus on people to the detriment of the objectives; taking on learning tasks where that person has the role of rescuing the others; the inability to refuse; the non-prioritization of aid applications; the unrealistic desire to thank everyone in the absolute terms; the mistrust in sources/people who would be helpful/assessors; the negative affective states: avoiding the unpleasant topics and actions; depression because the expectations have been defeated; the excessive tiredness: when the student engages in many tasks, wishing to have the control; not requesting help; non-differentiation of tasks according to the criteria of urgency and importance.

In the above-mentioned we have shown that the causes of the poor time management or the constraints in this regard are internal, but they are also external: the unwanted visitors, the unexpected phone calls or the interruptions coming on various channels of communication, the worthless correspondence, targeted expectation, unproductive meetings, the existence of certain crisis or unnecessary demands, the lack of structure / organization by the teacher, the technical problems that can not be solved.

The principle of Pareto, theorized by Juran (Juran, Godfrey, 1999: 31), shows that not all the work is qualitative, but only 20% of it, which in the field of maximizing the learning efficiency means identifying those major factors that provide the majority of the results and eliminate 80% of the inefficient activity. It is necessary to focus on increasing the productivity rather than increasing the effort or resources; this is done by selecting the need for effort, instead of amplifying it in achieving the goals. In this case, as we have shown before, that the psychologists recommend students to perform the metacognitive and introspective activities, their own registration being possible by using diaries, worksheets, or behavioral graphs.

### **The Management modalities of time used. Effectiveness**

The effectiveness can be understood as the relationship between the efficiency and the usefulness of the activity being carried out. According to Watkins, Carnell, Lodge, Wagner, Whalley (2000), the one who learns effectively, performs planning, monitoring and reflection actions on this activity.

People who have the sense of their own efficacy address the difficult tasks as challenges, engage themselves actively, set complex goals, revise their behavior and persevere in case of failure, are internist, meaning they attribute and assume themselves the success and the failure.

At the level of the students' objectives, their achievement is influenced by their specificity, by the level of difficulty and by the proposal to achieve timely.

The time management shows that it is desirable for the learner to start with lighter subjects or contents, after that to go to the most difficult and keep to the end a pleasant one, respecting a curve of the approach, depending on the degree of difficulty; to avoid planning marathon study sessions; to set up a study program and then to communicate it to others, refusing any temptations or distractions; to monitor own use of time, use pauses, and to combine the activities.

The students can also follow some principles derived from the explanations and laws that govern learning: 1. the use of natural light hours/ periods, study in the first part of the day, but according to individual biorhythm; 2. the global analysis of the material to be taught, before reading it, studying immediately after courses; 3. determine the tasks according to the priorities; 4. start-up of the long-term tasks even before the deadline; 5.

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the realistic approach when planning activities, especially if they are unlikely to be done during the week; 6. the personal discovery of the time when he/she needs to study (for one hour in the class it would take 2 hours at home, but this time will be adjusted, plus or minus, as needed); 7. planning for long periods of time (in general, 50 minutes of learning should be followed by 10 minutes of pause, the shorter periods can be used for making sheets, processing, organizing information, memorizing, and the longer periods for problem solving and writing); 8. develop an agenda for each study period; 9. trying to express in own words what is read, studying until it the learned content can be reproduced, before emphasizing or writing; 10. Using certain ways of diversification and relaxation, setting a special place where learning can take place, linking the material learned with the previous experience, life / daily activities and professional activity.

A simple matrix for the time planning (Covey, 1996) involves placing the activities according to the urgency and importance criteria. Thus, there are activities to be addressed in the following order: urgent and important (for example, fixed-term situations); important, but not urgent (e.g.: cultivating relationships, planning/recognizing opportunities); urgent, but not important (e.g.: interruptions, appointments, phone calls, common activities); neither urgent, nor important (e.g.: routine activities).

Considering the distribution of the activities and their approach according to the above criteria, the mentioned author considered that the efficient management means giving "priority to the priorities" (Covey, 1996: 134).

The planning and the use of the learning time by students are done during the academic semester or, more intensely, in the exams session, in different ways: by achieving a learning schedule that is respected; placing the moment of learning either in the morning or in the evening, then setting the schedule for other activities; the distribution of the learning material by quantity and difficulty criterion (a number of pages each day), adapting the deadlines to the pace of learning; building a program to avoid overloading; using an agenda, a calendar; reporting to the other daytime activities; establishing certain stages correlated with the specifics of the learning material; strict adherence to the self-proposed program; setting the priorities (during the exams session, the learning is a priority); using the moments of the maximum availability or receptivity for learning; the rhythmic daily allocation of time for learning.

The students can adapt some of the time management tools: the management by goals, matrices or spreadsheets, SWOT analysis, the Gantt Chart, the mind mapping, the assessment sheets, software, under the condition not to consume too much time, but to use for a better systematization of the activity.

### **Education for free time for students. Quality time**

Our previous analyzes converge to the idea that in learning, there is necessary time and used time. What is the spare time for students?

The student's daily time budget includes several categories of activities: personal care, meal, travel, lessons, independent learning or study, sometimes work, extracurricular individual and collective activities (sports, arts, competitions, volunteering, work in projects, associations), viewings of spectacles, films, theater, TV programs, the use of the Internet and other channels of communication, the household activities, recreational and entertainment activities, sleeping.

For the leisure time, there is no question of establishing a new organizational program, besides the one of the working time or learning, but of the self-organizing actions

and activities to which the student can participate with pleasure, depending on the interests and skills that he/she has for certain areas of the social, artistic and cultural life.

When students are employed in professional tasks, the time planning is more difficult, therefore the spare time is used for learning.

The participation in the leisure activities varies according to the lifestyles and the characteristics of the individuals (Balci, 2003, cited by Eratay, Aydoğan, 2015: 2213-2214) and the subcategories of activities or modalities are very diverse, with gender, race, economic level differences, etc., being obvious the preference of any person for actions with a character of entertainment. The same authors showed that the use of the leisure time gains significance in certain age periods. In addition to the personal benefits obtained of people from participating in the leisure activities from a social point of view, the benefits are that the respective person contributes to the development of the cultural identity and reduces his or her unsuitable or antisocial behaviors.

The quality of free time results from the achievement of the psycho-emotional balance, through choices on what students want to accomplish, determined (as a positive formulation, unlike what they do not want), but it is also useful. We understand that they choose to access wellbeing programs, focused on recreational activities, for the personal development, hobbies, sports, activities with friends etc. The change of the environment or framework is also important, whether it is an ergonomic, friendly organization of the indoor space or, more recommended going outside in nature. Active ways, which contribute to a motivational optimum, to the recovery of energy forces, and systematic desensitization to stressful situations such as are the exams, are also viable ways of spending the leisure time.

### **Conclusions**

The time management is done by: selecting the right time to study, using time (prioritization, respecting deadlines), avoiding the postponement, clear identification of the objectives, of appropriate people, applying certain adjustments of the temporal resource, allocating certain reserve time, setting up daily routines, capitalization on the moments of maximum capacity, complying with the deadlines, the resolution of important issues, even if they are unpleasant, elimination of what is unimportant, fixing of concentration periods for the situations in which a project is to be completed, grouping the activities, combining the learning with the moments of break, tackling a situation globally, providing a decanting time between planned/accomplished actions.

The stress control must be preceded by its prevention, in fact, by balanced approach of the problem of learning tasks, by acting on optimizing the capacities utilization, motivation, training, and improving the typical responses to stress, by the self-compensation, relaxation, self-suggestion.

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ORIGINAL PAPER

## Managing Ethnocultural Pluralism in Montenegro: Do We Need Interculturalism?

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**Abstract:**

Ex-Yugoslav countries are known as countries in which ethno-national identity was, or still is, traditionally dominant. Montenegro is no exception, as it belongs to the group of countries with high level of ethnocultural pluralism. Pluralism and multi-ethnic character are the result of the historical existence of national minorities and minority peoples on its territory. Therefore, national minorities are the dominant type of ethnocultural communities in Montenegro. It is reflected on the specificity of the requirements that these communities have for the state and on the character of multiculturalism model, which is applied in institutional, legal and political sense. The reaches of mechanisms and multiculturalism policy measures can be evaluated from the perspective of ethnonational communities, but also from the perspective of the society as a whole and its cohesion. In this sense, the importance of interculturalism is emphasized, as a kind of `supplement` to the multiculturalism policies, which is supposed to strengthen the interaction, exchange and contacts between the communities and to make `living with each other` possible, not `living next to each other`.

**Keywords:** *Multiculturalism; Montenegro; national minorities; interculturalism*

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## Managing Ethnocultural Pluralism in Montenegro: Do We Need Interculturalism?

### Introduction

Regardless of the differences in views among theoreticians on the definition of the model of multiculturalism, a consensus has been reached on the fact that the elements of this model and its implications are dependent upon the particular social and political context. The effects of multiculturalism in countries whose most critical challenge is the integration of immigrants, are different than its effects in countries who primarily aim at meeting the demands of national minorities. *Communal diversity* (Parekh, 2002:4), i.e. multiculturalism which is a result of ethnic and cultural differences, and the specificities of multiculturalism in each particular case determine the holder of the rights, the mechanisms and means of implementation of the politics of multiculturalism. Multiculturalism in contemporary societies is a far more comprehensive and elaborated concept compared to how it was defined in the premodern era. Consequently, it poses greater challenges for states. In light of democratic principles and human rights, minority ethnonational communities demand equal possibilities in terms of participation in political decision making, and shaping of social life as a whole (Parekh, 1998: 68, 69). The fight against “status hierarchies” (Kymlicka, 2010), which aims at revealing all forms of inequality and cultural domination, i.e. the domination of a single ethno-cultural and ethnonational identity, is the essence of the politics of recognition and acknowledgment. Unless an equal position is secured for all ethnonational communities, and unless their participation is enabled in political decision making processes, there can be no talk of consolidation of democracy in that particular context.

This poses a particular challenge for former Yugoslav countries, and Eastern Europe as a whole, bearing in mind the specificities of their development throughout history, and the way in which national identities have been formed in this region. Therefore, any attempt of analysis of the politics of multiculturalism in these countries, including Montenegro, must take into account the specificities of their multi-ethnicity, characterised by: “A close connection between national cultures, territorialisation and the numerousness of ethnic groups, as well strong opposition to the concept of political and territorial autonomy” (Bašić, 2016:60). It is a fact that all post-socialist countries in the region are dominated by ethno-nationalism, to a greater or lesser degree, which further complicates the issue of managing ethno-cultural pluralism. Even when they declare that they want to distance themselves from such a way of forming a national-state identity, in reality, they frequently rely on the elements and practice of the ideology of ethno-nationalism.<sup>1</sup> In the process of identity-forming at the national-state and ethno-cultural level, the ethnonational matrix renders such an identity isolated, to a greater or lesser degree. This primarily refers to ethnonational communities in the first case, and the individual members of those communities in the latter. Montenegro is among such countries with a high degree of ethnonational pluralism, as demonstrated by its demographic data. It is a multicultural country, when that term is used in the demographic-descriptive sense of the word. Ethno-cultural pluralism of contemporary societies, as a form of cultural pluralism, is considered a characteristic that ought to be preserved. In UNESCO’s Universal Declaration of Cultural Diversity, adopted in 2001, the value of cultural pluralism of contemporary societies is acknowledged in the following manner: “Cultural diversity is as necessary for humankind as biodiversity is for nature. In this sense the common heritage of humanity and should be recognized and affirmed for the benefit

of present and future generations”. (UNESCO, 2001:4).<sup>2</sup>By recognising the significance of preserving ethno-cultural diversity and the specificities of ethno-cultural identities in the context of contemporary states, the UNESCO Declaration acknowledges the significance of preserving (ethno)cultural pluralism: “In our increasingly diverse societies, it is essential to ensure harmonious interaction among people and groups with plural, varied and dynamic cultural identities as well as their willingness to live together. Policies for the inclusion and participation of all citizens are guarantees of social cohesion, the vitality of civil society and peace” (UNESCO, 2001:4)<sup>3</sup>.

This paper will not provide a detailed overview of the politics of collective rights in the period when Montenegro was a member republic of the state community. Rather, it will focus on the degrees of recognition of the multicultural character in the legal-political sense of the word, from the point when a multi-partite system was first introduced in the country, to present time and current circumstances.

### **Multiculturalism in Montenegro - The phases of development**

Montenegro can be grouped among the countries that belong to the so-called *multi-cultural model*, according to the classification of national states using the criteria of citizenship developed by Castles and Miller.(Guibernau, 2007:62). Within this model, a national community is grounded as a political community, while its ethno-cultural pluralism remains acknowledged.<sup>4</sup> Countries that employ the multicultural model secure adequate institutional and legal solutions, and create a political ambient which contributes to the preservation of identity specificities of ethno-cultural communities, and their integration in the social and political life of the community. This inclusion must be based on equality, so that all forms of discrimination, assimilation and marginalisation of ethno-cultural and ethnonational communities are prohibited. All minority communities must have the possibility to equally participate in political decision-making, and in managing the society at all levels of decision-making. The application of the model of multiculturalism in terms of minority ethno-cultural and ethnonational communities in Montenegro is marked by two phases. The first phase coincided with the introduction of a multi-partite election system in Montenegro, and lasted until 1997. During this phase, the process of securing legal and political solutions in line with the model of multiculturalism was not well developed. The matter of the position and participation of minority ethnonational communities was mainly marginalised. However, the political situation at the time induced certain changes that would result in the creation of an improved ambient for the adoption and the implementation of the model of multiculturalism. Until the adoption of the Law on Minority Rights and Freedoms in 2006, the legal and political solutions in line with the politics of multiculturalism had a modest impact. The adoption of the above mentioned law and the Constitution of Montenegro in 2007 present the foundations for the application of the model of multiculturalism in the context of Montenegro.

The Law on Minority Rights and Freedoms primarily defined the term “minority” and set definite institutional and legal solutions for the protection of minority ethno-cultural communities and their identities. It starts from the obligation to adopt the Strategy for Minority Policy, continues with a set of guaranteed rights in the area of visibility and presence of minority communities in the media, as well as rights in the area of education, and concludes with enabling minorities to form minority councils. National minority councils and the formation of the Fund for Minorities are the most significant institutional changes brought by this Law. Subsequent legislation amended the forms of organisation

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and functioning of minority councils and the Fund for Minorities. The Constitution of Montenegro, adopted in 2007, developed the model of multiculturalism in a special section - the fifth section - which deals with minority rights, and which is divided in two groups of provisions. The first group of provisions deals with matters related with the protection of identity, and entails a list of rights that members of minority peoples and other minority national communities can exercise either individually or in a community (Article 79). The second group of provisions (Article 80) deals with prohibition of all forms of assimilation.

Imprecise and inconsistent use of the terms “minority nation” and “other minority national communities” can be observed in the relevant legislation. The Constitution does not specify which communities fall in the first group, and which fall in the second, nor does it provide a clear criterion for drawing this distinction. Will Kymlicka, one of the lead theorists of multiculturalism, sets boundaries between national minorities, immigrant communities and indigenous peoples, in the context of the model of multiculturalism (Kymlicka, 2010: 36-37). Each model employs different forms of legal and political measures secured by the state, in line with the specificities of the demands of the different types of ethno-cultural communities. States can apply one or all three of these models, depending on the specificities of the type of ethno-cultural pluralism within the national-state context. The model of multiculturalism applied when national minorities are the present form of ethno-cultural communities in a particular state, most frequently comprises a combination of six different elements, according to Kymlicka: “1. Federal or quasi-federal territorial autonomy; 2. Official language status, either in the region or nationality; 3. Guarantees of representation in the central government or on Constitutional Courts; 4. Public funding of minority language universities/schools/media; 5. Constitutional or parliamentary affirmation of “multinationalism”; 6. According international personality e.g. allowing the substate region to sit on international bodies, or sign treaties, or have their own Olympic team” (Kymlicka, 2010: 37).

The model of multiculturalism applied in Montenegro is the closest to the model which corresponds with national minorities, with certain elements that Kymlicka associates with multiculturalism for immigrant communities.<sup>5</sup> In terms of the first element, the context of Montenegro is more characterised by what Kymlicka associates with the politics of multiculturalism for immigrants. The existence of federal or quasi-federal territorial autonomy is not a characteristic of the context of Montenegro, but it is possible to say that there is constitutional, legislative or parliamentary affirmation of multiculturalism, at the central and/or regional and municipal levels. At the national-state, and the local levels, the Constitution and the relevant legislation affirm the multicultural character of the state and the need to secure, implement and develop guaranteed minority rights. The right to political participation and representation of minority ethnonational communities is secured in the Constitution of Montenegro and by regulations in the area of electoral legislation. Members of minority peoples and other minority national communities have the right to authentic representation in the Parliament of Montenegro and the assemblies of the local self-government units in which they comprise a significant share in the population, according to the principle of affirmative action (Article 79, point 9). Additionally, in terms of securing political participation of minority ethnonational communities, point 10 of the same Article guarantees the right to proportionate representation in public services, state authorities and local self-government bodies.<sup>6</sup> Measures of affirmative action were introduced in the area of electoral legislation. Their

aim was to secure political participation and representation of minority peoples and other minority ethnonational communities.

The next element that Kymlicka emphasises as a significant part of the model of multiculturalism for national minorities is the existence of public funding for educational institutions and the media that use the language of national communities. Two additional elements may be added here, which are of particular importance for the context of Montenegro, and which Kymlicka associates with the model of multiculturalism for immigrant communities. They are: The adoption of multiculturalism in school curriculum, and the inclusion of ethnic representation/sensitivity in the mandate of public media and media licensing. In terms of the implementation of this model in the media, Article 79 of the Constitution of Montenegro specifies that minority peoples and other minority national communities have the right to information in their own language. Article 12 of the Law on Minority Rights and Freedoms, adopted in 2006, states that the competent administrative and programmatic bodies of the media founded by Montenegro have to provide an appropriate number of hours for broadcasting news, cultural, educational, sports and entertainment programmes in the languages of minority nations and other national minority communities, and to provide the financial means for funding such programme contents.<sup>7</sup> Therefore, in the normative sense, visibility of minority ethno-cultural communities in the media has been secured. In reality, the presence and duration of content aimed at minority ethno-cultural and ethnonational communities broadcasted by the national public broadcaster financed by the state must be analysed. In the programme and production plan of the Television of Montenegro for 2016, a total of 6 880 minutes of the programme was allocated for content aimed at national and ethnic minorities, which is 2 % of the total programme content. A lack of home-produced programmes is compensated by content purchased from other broadcasters. These programmes are mainly educational and informational. The content provided in the Albanian language (one daily show, one weekly show, and one New Year's Eve show) had 5 360 minutes, while content in the languages of other national minorities had 1 950 minutes in the plan. A total of 600 minutes was allocated for content aimed at the Roma ethnic community, which is marked by severe socio-economic difficulties.<sup>8</sup> The Law on Amendments to the Law on Public Radio-Diffusion Services was adopted in 2016.<sup>9</sup> Article 9 of the said Law stipulates that the programme, the amount of financial support and the provision of that support is subject to contractual agreement between the Government of Montenegro and the Radio and Television of Montenegro (RTCG). It also foresees organising public debates on the proposals of programme obligations of RTCG, lasting for 45 days, so that the general public could have insight into whether or not the submitted proposals meet the criteria that, among other things, also refer to affirmation and preservation of minority ethno-cultural identities. In terms of the state financial support to the national broadcaster, the Law proposes a new solution which requires the Government of Montenegro to allocate 0,3 % of the GDP from its budget to the national broadcaster (Article 16). This solution was supported by representatives of minority national communities, who had criticised the previous arrangement, by which a total of 1,2 % of the yearly adopted budget was allocated to the broadcaster. The actual financial support was frequently smaller than what had been allocated due to budget cuts. The part referring to national minority programmes in the programme-production plan of RTCG for 2017 was not amended in accordance with the new law.<sup>10</sup> The duration of the programme content aimed at the Roma ethnic community was increased to 660 minutes.<sup>11</sup> Evidently, certain changes have to be made in the area of media representation of this community,

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which is also the case in the area of political participation and representation of the Roma ethnic community, marked by severe normative shortcomings and issues with implementing the guaranteed rights, such as the right to proportionate representation.<sup>12</sup> Therefore, we argue that the visibility of the Roma ethnic community in the media must be increased. The current solution, providing 660 minutes of media representation focused mainly on one show presented by the public broadcaster, is inadequate. One of the measures defined for reaching the goal of greater media presence of the Roma community, defined in the Strategy for Social Inclusion of Roma and Egyptians 2016-2020, is the production and broadcasting of radio shows in the Roma language.<sup>13</sup> Less than 6 % of the programme of the Radio of Montenegro deals with topics related to national minorities. The plan to broadcast a radio show “Glas Roma” (“The Voice of the Roma”) has still not been realised. Consequently, there is an evident lack of content that would provide visibility and affirmation of the identity specificities of this community, and of the most critical problems that the members of this community face in the process of integration.<sup>14</sup>

Another critically important area in the model of multiculturalism is the area of education. As was mentioned before, the main elements of this area have to do with financing of educational institutions that provide education in the language of national minorities, and the adoption of multiculturalism in school curricula. In that sense, the Constitution of Montenegro guarantees the right to education in their own (national minority) language and alphabet in public institutions, and the right to have included in the curricula the history and culture of the persons belonging to minority nations and other minority national communities.<sup>15</sup> Article 13 of the Law on Minority Rights and Freedoms provides that minority nations and other national minority communities and persons belonging to them shall have the right to education in their language and to adequate representation of their language in general and vocational education. This representation is achieved through special schools or special classes in regular schools. The curricula for certain subjects have to contain topics in the field of history, culture and other identity specificities of minority communities.<sup>16</sup> Classes with instruction in the Albanian language is performed at all levels of education. Special attention is paid to the education of members of the Roma ethnic community, as a prerequisite for defining a solution for the ongoing problems that inhibit successful integration of this community. Improvements can be noted in this area. The aims defined in the Strategy for Social Inclusion of Roma and Egyptians in Montenegro 2016-2020, entail increasing the number Roma children enrolled in pre-school and school education, and decreasing the number of children failing to attend school. The Strategy provides occupational standards for the working post *associate in the social inclusion of Roma and Egyptians in Montenegro*, first of its kind in the country, so as to facilitate the process of adapting to the educational system, and motivate active participation among the Roma children. The model of affirmative action also applies in this area in terms of setting quotas system for enrolment of a certain number of members of the Roma and Egyptian ethno-cultural community in secondary schools and university institutions.<sup>17</sup>

It can be said that, in legal, political and institutional terms, despite the before mentioned shortcomings, multiculturalism in Montenegro is the model which is being employed in managing ethno-cultural pluralism. However, particular attention must be paid to the effects of the model being applied, not just in terms of the position of individual communities and their rights, but in terms of the impact of the model on inter-ethnic relations and the society as a whole.

### **Multiculturalism vs. Interculturalism**

The matter of the effects of the politics of multiculturalism, broadly speaking, implies taking into consideration the impact that the model being applied has on the relationships between ethnonational and ethno-cultural communities. Is communication on the increase, leading to interaction and better understanding between the communities, as a result of the application of all the mechanisms and measures of this model, or does it lead to closing off, and a certain degree of self-isolation of ethnonational and ethno-cultural communities?

This is one of the downsides of the model of multiculturalism. In societies traditionally dominated by ethnonationalism, with less likelihood that minority ethnonational communities will identify with the common national identity, there is a danger of isolationism. Using the mechanisms and measures of the politics of multiculturalism leads to the integration and improvement of the social and political status of ethno-cultural communities. However, this is not the only point of the politics of multiculturalism. If it does not simultaneously contribute to strengthening inter-ethnic relations, in terms of greater understanding, communication and interaction between the communities, there is a threat of disintegration of the society, and self-isolation of the communities. Additionally, if a particular community has problems identifying with the common political identity, there is a greater chance that that community will have a greater degree of isolation. Therefore, the critical question that the model of multiculturalism must answer is how to cohabit (live with one another, rather than next to each other) in conditions of ethno-cultural pluralism?<sup>18</sup>

In theory, there is an ongoing debate juxtaposing elements and effects of the models of multiculturalism and interculturalism. In the said debate, the critics of multiculturalism and those who support the inter-culturalist perspective, argue that the model of multiculturalism disregards the complexity of cultural identities, by insisting on “an idea of culture as temporally and spatially fixed.” (Antonsich, 2015:1). Multiculturalism fails to provide an adequate response to the complexity of ethno-cultural communities, i.e. to their heterogeneity. Instead, it treats these communities as more or less homogenous entities. This is precisely what the model of interculturalism is trying to avoid, although there is a lack of consensus among the supporters and the critics of the model on whether it is a new, unique model, or whether it is merely a derivative of multiculturalism. Meer and Modood identified four ways in which interculturalism allegedly opposes multiculturalism and its downsides. However, the model of multiculturalism, as presented in that relationship, is a simplified one, and therefore incomplete, and interculturalism still seems to be a derivative of multiculturalism, rather than a model on its own (Modood, 2014:303). Advocates of the idea that it is a new model start from the premise that it implies more than pure coexistence of communities; it includes more interaction and dialogue compared to multiculturalism. Furthermore, interculturalism does not focus on the group as much as multiculturalism does; instead, it focuses on the whole, in terms of a common identity. Another aspect of interculturalism that makes it different than multiculturalism, according to some of its representatives, is the fact that it is more critical of non-liberal cultural practices compared to multiculturalism (Modood, 2014: 302, 303). Ted Cantle isolates a few key characteristics of interculturalism.<sup>19</sup> Primarily, interculturalism implies a deviation from traditional

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conceptions of identity based on differences, and emphasising what supersedes those differences in the sphere of identification and belonging. We believe that Cantle argues that the term “common identity” is rather imprecise, and that it has multiple meanings. Cantle focuses on certain forms of cosmopolitanism and the common identity in the broadest possible sense of the word. However, a common identity does exist, and it exists at the level of a national-state political identity, which, in a way, supersedes ethno-cultural and ethnonational particularities, and gathers them under a single umbrella. With that in mind, Tariq Modood quite rightfully argues that Cantle’s model of interculturalism is, in fact, a variation of cosmopolitanism (Modood, 2014:304). Furthermore, Cantle insists that interculturalism implies the necessity to use education with the aim of socialising individuals toward the experience of Others, the ones who are different in the ethno-cultural or the ethnonational sense, in a positive way. This means that ethno-cultural specificities and differences are perceived as an opportunity to learn, understand differences and broaden one’s own identity. In that sense, the pluralism of identity, and the various forms of transitional identities that combine various forms ethno-cultural and ethnonational belonging, carry a special value, and should be equally treated. In his view, the need to connect all the members of different communities on every-day basis (in neighbourhoods, school, work place etc.) is equally important, and the members of the communities must see that they are being treated equally, and that they share a social space.<sup>20</sup> This is what Gerard Bouchard labels as the second level of interculturalism, the so-called *interculturality*, or the micro-social level, as differentiated from the social level, which implies defining certain principles of the model (Bouchard, 2011:444). Bouchard presents the basic characteristics of interculturalism, analysing it as a model of managing ethno-cultural pluralism at the first level. Primarily, it is a model that acts in the context of duality and the relation majority/minority. This relation is frequently laden by a feeling of fear or threat that controls one or the other side, regardless of whether the minority is a national minority or an immigrant community. In such circumstances, regardless of the cause, stereotypes, exclusion, marginalisation and different forms of discrimination develop easily. Bearing the paradigm presented here in mind, minority and majority groups must not be understood as homogenous entities (Bouchard, 2011:447). Another characteristic of interculturalism is that it is a model which advocates a positive view on dialogue, and which promotes the need for greater interaction and exchange between ethnonational and ethno-cultural communities. The third main characteristic refers to the fact that the said model implies that all members of a particular society are responsible for creating intercultural relationships and contacts on an every-day basis. Interculturalism aims at avoiding a communitarian approach, which comes with a risk of fragmentation; instead, it emphasises the significance of the common traits, i.e. of the elements that can serve as links between ethno-cultural and ethnonational communities, which is the fourth characteristic of this model. A lack of dialogue and exchange, and a lack of forming relationships leads to greater risk of marginalisation and fragmentation (Bouchard, 2011:448 - 450).

Although there are such advocates of interculturalism as a new model of managing ethno-cultural pluralism who share a simplified and frequently flawed understanding of the model of multiculturalism, it is necessary to point out a few facts. Indicating certain tendencies that can appear as an effect of the politics of multiculturalism is absolutely justified. The dichotomy majority/minority, typical of the model of multiculturalism, is subject to correction in the model of interculturalism, so that it implies interaction and exchange, regardless of the majority-minority type of relationship, as it

eventually enriches the majority (Bugarski, 2016:112). The context of Montenegro is traditionally characterised by domination of ethnonationalism, where the collective takes primacy over the individual. In such circumstances, the aforementioned tendencies can be encouraged. Therefore, it is very important to adopt certain elements of the model of interculturalism in future development of multiculturalism for ethnonational communities. Primarily, we refer to two such circumstances. Interaction, understanding and exchange between ethnonational communities must be motivated, regardless of whether these are majority or minority communities. The development of *interlinguality* can also play a major role in this context, particularly in the educational system. Finding ways to increase the level of interest in the Others and their identity specificities is crucial, as is finding a way of avoiding the perception of Others as a threat. Working on reducing ethnic distance is equally important, which is the responsibility of all social subjects, but it is primarily the responsibility of political elites. The degree of political instrumentalisation and politicisation of the ethnic and the national must be reduced. Additionally, it is important to bear in mind that ethnonational and ethno-cultural communities are heterogeneous in terms of the definition and experience of their own identity. They are not homogenous, monolithic structures, which is a frequently disregarded fact. Furthermore, apart from the complexity present at the level of the community, the same complexity prevails over personal identity. In such contexts in which ethnonationalism is traditionally dominant, and contexts marked by a significant degree of politicisation of ethnic and national identification, pluralistic identities are perceived as dubious. Affirmation of pluralistic identities is seen as a threat to the community and its homogeneity, grounded in ethnonational principles. A community grounded in ethnonational principles is primarily interested in preservation of homogeneity inside its own ethno-cultural space, and in prevention of the relativisation of its identity. This goal is frequently reached by pressuring individuals and reducing the scope of their freedoms. In terms of identity, the aforementioned processes manifest as insistence on preserving the authenticity and exclusivity of belonging to a community. Any type of split loyalty, in terms of simultaneous belonging to another ethnic or national community, is greeted with doubt and distrust. Interculturalism emphasises the need to accept the fact that a significant number of individuals have multiple, pluralistic and dynamic identities. It is necessary to create a political and legal ambient which would facilitate affirmation of pluralistic identities and their equal treatment.<sup>21</sup> Achieving this goal would reduce the likelihood of political instrumentalisation and political abuse of ethnic and national identities. We believe that all of the aforementioned is critical for future democratisation of the Montenegrin society.

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<sup>1</sup> On the specificities of the context of south-eastern Europe in terms of the application of the model of multiculturalism, Stanković-Pejnović poses three assumptions, widely accepted in South-eastern Europe: "Minorities are disloyal, while a strong and stable state requires weak and powerless minorities (whatever is beneficial for minorities is a threat to the majority), and the treatment of minorities is a matter of national security" (Stanković-Pejnović, 2010: 481). On the elements of the ideology of ethnonationalism, see: (Kecmanović, 2014: 117-134).

<sup>2</sup> UNESCO's Universal Declaration of Cultural Diversity, 2001. Available from: [http://portal.unesco.org/en/ev.phpURL\\_ID=13179&URL\\_DO=DO\\_TOPIC&URL\\_SECTION=201.html](http://portal.unesco.org/en/ev.phpURL_ID=13179&URL_DO=DO_TOPIC&URL_SECTION=201.html) (15.11.2017).

<sup>3</sup> UNESCO's Universal Declaration of Cultural Diversity, 2001. Available from: [http://portal.unesco.org/en/ev.phpURL\\_ID=13179&URL\\_DO=DO\\_TOPIC&URL\\_SECTION=201.html](http://portal.unesco.org/en/ev.phpURL_ID=13179&URL_DO=DO_TOPIC&URL_SECTION=201.html) (15.11.2017).



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<sup>4</sup> Apart from the aforementioned, Castles and Miller present the following models: *Imperial* (typical for the premodern era, when membership in a political community was determined in terms of being a subject of the same power or ruler); *the folk or ethnic model* (exclusive by nature. In this model, members of a particular political community are only those who are members of ethnic community based on common descent and the understanding of a nation as an extended family); *the republican model* (the nation and the national state are determined in legal-political terms, and there is a tendency to create a distance from all forms of collective rights) (Guibenau, 2007: 62)

<sup>5</sup> Forms of multicultural citizenship for immigrant groups include a combination of the eight policies, among which we emphasise the following: „1. Constitutional, legislative or parliamentary affirmation of multiculturalism, at the central and/or regional and municipal levels; 2. The adoption of multiculturalism in school curriculum; 3. The inclusion of ethnic representation/sensitivity in the mandate of public media and media licensing; 4. The funding of ethnic group organizations to support cultural activities; 5. Affirmative action for disadvantaged immigrant groups “(Kymlicka, 2010: 37).

<sup>6</sup> The Constitution of Montenegro, 2007, available from:

<http://www.sluzbenilist.me/PravniAktDetalji.aspx?tag=%7B70C61F26-B411-4FA2-BEF3-45A4E23C998A%7D> (20.11.2017.).

<sup>7</sup> The Law on Minority Rights and Freedoms, 2006. Available from:

<http://www.sluzbenilist.me/PravniAktDetalji.aspx?tag=%7B9CA4613B-9871-47EF-A24A-DFEDA6E15F38%7D> (17.11.2017.).

<sup>8</sup> The programme-production plan of the Television of Montenegro for 2016, pp. 51-54. Available from: <http://rtcg.me/rtcg/poslovanje.html> (17.11.2017.).

<sup>9</sup> Article 9 of the Law specifies that the “programme obligations of RTCG fulfil the democratic, social and cultural needs of the democratic society and guarantee pluralism, including cultural and linguistic variety, and that RTCG must apply high standards of professional ethics and quality in producing and broadcasting programme contents, free from any form of discrimination”. These programme contents are “intended for all segments of the society, with particular attention to youth and children, *members of minority nations and other minority national communities*”, and that these contents, apart from aiming at affirming and preserving the Montenegrin identity, also aim at *preserving and affirming the cultural and ethnic identity of other minority national communities, the European cultural heritage and cultural diversity* (italics: D.V.Ć)

The Law on Amendments to the Law on Public Radio-Diffusion Services, 2016, p. 3. Available from: <http://www.sluzbenilist.me/PravniAktDetalji.aspx?tag={98B736AA-3E8E-4B27-B173-12EE3546CD9C}> (20.11.2017.).

<sup>10</sup> The duration of the minorities programme was increased from 6 880 minutes in 2016 to 7370 in 2017. The duration of the programme in the Albanian language remained the same as in 2016, 5 360 minutes. For shows in other national minority languages, a total of 2 010 minutes was allocated in 2017, while in 2016, it was 1 950 minutes.

<sup>11</sup> The programme-production plan of the Television of Montenegro for 2017, p. 46. Available from: <http://rtcg.me/rtcg/poslovanje.html> (17.11.2017.).

<sup>12</sup> This is particularly important bearing in mind the Report by the Ministry for Human and Minority Rights on employment and the situation in administrative areas for 2015, which provides research results on the perception, attitudes and experiences with discrimination in Montenegro, that the aforementioned Ministry conducted in 2015 (Research with the same goal was conducted in 2011 and 2013 by the aforementioned institution). Social groups were ranked according to the degree of discrimination from most discriminated, to middle and least discriminated. According to the views of Montenegrin citizens, the Roma population is the most discriminated group. Compared to the results of previously conducted research, there are no tendencies that would indicate an improvement of the position of the Roma ethnic community. For more details, see:

Report by the Ministry for Human and Minority Rights on employment and the situation in administrative areas for 2015. Podgorica, 2016, pp. 8-9. Available from:

<http://www.mmp.gov.me/pretraga?query=Izvje%u0161taj&siteId=48&contentType=2&searchType=4&sortDirection=desc> (10.11.2017.)

<sup>13</sup> Strategy for Social Inclusion of Roma and Egyptians in Montenegro 2016-2020, p. 116. Available from: <http://www.mmp.gov.me/biblioteka/strategije> (13.11.2017.).

<sup>14</sup> Radio of Montenegro - Draft of the programme-production plan for 2017. Available from: <http://rtcg.me/rtcg/poslovanje.html> (12.11.2017.).

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<sup>15</sup> The Constitution of Montenegro, 2007, article 79. Available from: <http://www.sluzbenilist.me/PravniAktDetalji.aspx?tag=%7B70C61F26-B411-4FA2-BEF3-45A4E23C998A%7D> (20.11.2017.).

<sup>16</sup> The Law on Minority Rights and Freedoms, 2006. Available from: <http://www.sluzbenilist.me/PravniAktDetalji.aspx?tag=%7B9CA4613B-9871-47EF-A24A-DFEDA6E15F38%7D> (20.11.2017.).

<sup>17</sup> For more details on the goals and measures defined for the integration of Roma and Egyptians in the area of education, see: Strategy for Social Inclusion of Roma and Egyptians in Montenegro 2016-2020, pp. 23-44. Available from: <http://www.mmp.gov.me/biblioteka/strategije> (20.11.2017.).

<sup>18</sup> In societies marked by a situation in which ethno-cultural diversity is becoming more complex, this question changes. Instead of asking how to live *with* diversity, the key question is how to live *in* diversity. (Antonsich, 2015:1)

<sup>19</sup> Ted Cattle is one of the representatives and promoters of interculturalism as a unique model of managing ethno-cultural pluralism. In his view, multiculturalism is completely inadequate in conditions of increased diversity, which is a result of globalisation. He argues that multiculturalism ignores certain new characteristics of the new reality, such as the dynamism of identity in the conditions of globalisation, the need to employ an interdisciplinary approach in studying this problem matter, the political and power structures etc. The fluidity of identity, and the impossibility of essentialising it is what advocates of multiculturalism frequently disregard, by perceiving it as limited and enclosed. Furthermore, in his view, multiculturalism fails to take into consideration new relations and forms of belonging that are a result of diasporas, transnational communities, transnational movement and the impact of communication in the virtual sphere. The new context generated by globalisation leads to social links and relations that supersede the state-national dimension, and exist as a supra-territorial phenomenon. This circumstance amends the classic relation that multiculturalism adopts as the most important element - the relationship majority/minority. In these new conditions, the nature of minority communities and their inner relations grow more complex within the given national-state context. By providing data indicating an increase in the number of people who define themselves in terms of a cosmopolitan identity, and lower levels of identification with the national identity, Cattle argues that multiculturalism has a complete disregard of the importance of cosmopolitanism, and of the new circumstances. Available from: <http://tedcattle.co.uk/publications/about-interculturalism/#ii> (27.11.2017.).

<sup>20</sup> For more details, see: <http://tedcattle.co.uk/publications/about-interculturalism/#ii> (27.11.2017.).

<sup>21</sup> This necessity is recognised in the so-called Ljubljana Guidelines on Integration of Diverse Societies by the OSCE High Commissioner on National Minorities, 2012. The portion of the document that deals with the principles of integration acknowledges the fact that the contemporary identity of a great number of people is pluralistic and multiple. Contemporary circumstances render these identities multiple, contextualised, dynamic and layered. In terms of ethno-cultural belonging, multiple identities imply simultaneous existence of “several horizontal identities”, i.e. belonging to more than one national/ethnic group. The specificity of the context also dictates which identity is dominant in a particular period of time. This is particularly the case with ethno-cultural and ethnonational identities that gain significance in conditions of ethnic and national politicisation. The Ljubljana Guidelines emphasise inclusion of all the levels of governance in political decision-making, with a particular focus on *sub-state centres of decision making*. In the context of the Montenegrin society, this would impose a critical role to the on the *local level* in terms of implementation of the relevant plans of the integration policies. In the present state of the application of the model of multiculturalism in Montenegro, the local level, i.e. the application of the said model at the local level is one of its weakest links. This is particularly the case in the area of political participation and the right to authentic representation in the assemblies of local self-government bodies in which they comprise a significant share in the population. It was in 2017, when the Law on Minority Rights and Freedoms was adopted, that the meaning of “a significant share in the population” was specified, stating that it means a minimum of 5 % of the total population, according to the results of the two most recent population censuses (Article 4 of the Law on Amendments to the Law on Minority Rights and Freedoms).

Law on Amendments to the Law on Minority Rights and Freedoms, 2017. Available from: <http://www.sluzbenilist.me/PravniAktDetalji.aspx?tag=%7B596D56C2-54AF-4639-A664-F57A76F4B9B3%7D> (23.11.2017.).

The situation is similar in the context of exercising the rights to proportionate representation in local self-government bodies. There is a lack of precise records on proportionate representation at the local level.

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Additionally, in the area of the integration of the Roma community, a community in an extremely poor social, economic and political position, the local level plays a crucial role. However, according to representatives of this community, it is precisely the local level that failed to provide adequate support. Local action plans were adopted in several local self-government units (Nikšić, Berane, Herceg Novi, Bijepo Polje, Ulcinj, Tivat and Kotor) with the aim of successfully integrating members of this community in the social and political life at the local level. To this day, none of those plans have been implemented.

OSCE, High Commissioner on National Minorities *Ljubljana Guidelines on Integration of Diverse Societies & Explanatory Note*, 2012, pp. 14, 34. Available from:

<http://www.osce.org/sr/hcnm/110500?download=true> (23.11.2017). For more details on the Ljubljana Guidelines, see: (Đorđević, 2016: 197-213).

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## ORIGINAL PAPER

# What do we accept, what we neglect? The quest for the proper version of collective memory. Some considerations about the names present in urban space after the 2015 elections in Poland. The case of Łódź and its neighbourhood

Andrzej Dubicki\*

### Abstract:

Public space in Poland was a subject of spontaneous decommunization after the year 1989. What is interesting the wave of changes was observed mainly in the big cities, in small settlements it was usually restraint to the main streets and/or the subjects unanimously perceived as connected with communist ideology. In the small cities – in proposed case study in the commons around Łódź, usually the names connected with previous times remained, usually due to finances and people's habits. The situation changed only recently, after the 2015 elections, when the Law and Justice (PiS) party, began the complex decommunization of Polish reality. There was complex law prepared, and the special state agenda the Institute of National Remembrance was obliged to name the places whose names should be changed. From what seemed to be rather simple question it finally appeared very complex one due to pressed cohabitation on a local level, which is still visible due to different outcome of 2015 legislative elections and 2014 local ones. Peoples connected with present majority (PiS), have different understanding of collective memory then the politicians connected with Civic Platform (PO) and their minions from Peasant Party (PSL) or Nowoczesna etc. The most controversial element is the discussion about commemoration of persons connected with this version of history proclaimed by the ruling majority as *only true* – members of anti-communist resistance after 1945 or the victims of the Smoleńsk Crash (10th April 2010), which shaped modern political discourse in Poland. The proposed case study is Łódź and its neighbourhoods where proposed memorization of late president Lech Kaczyński became serious political issue. The sources for the analysis are: laws, local press and empirical knowledge. The aim of the study is to show how the final stage of decommunization is perceived by common people and by politicians do they feel that it is important or not?

**Keywords:** *Poland; Łódź, decommunization; street names; politics of memory*

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The Law on decommunization of the names present in urban space<sup>22</sup> [the Law] which was introduced in Poland after the *Law and Justice* (PiS) electoral victory caused serious nationwide discussion about its legitimacy, especially because it sparked another wave of changes (the first occurred just after 1989 and was rather spontaneous). This time, the political discussion about the issue of changing street names has reached the issue of: who will lose the commemoration (by law, it was restricted to the people related in some way to propagation of communism). Understandably, this triggered vivid discussion, which pointed to the argument that the streets which had to be changed under the Law, since they had survived the wave of spontaneous decommunization in 1989/1990, should not actually annoy anyone. The next element were the cases of commemorating, which occurred after the political transformation - since they were granted a street, monument, stadium already in the conditions of freedom and political pluralism, it should not be changed anymore. Finally, there was also a key problem in the selection of people or events that which were yet to be commemorated.

This problem however did not appear, only with the mentioned act. This was already visible during the process of naming newly appeared streets in the city. Surveys carried out 5 years ago indicate that only about one third of the population cares of the patrons of their streets<sup>23</sup>.

Urban nomenclature has a rich collection of onomastic and historical works. During the storms of history, it often changes. Lidia Pacan-Bonarek identifies the following reasons for the appearance of a new nomenclature in the urban space: the appearance of new streets, previously unnamed; change of the name to another one; disappearance of the name and object to which it relates and finally disappearance of the name despite the continued existence of the street (Pacan-Bonarek, 2015: 491). In relation to the presented *case study*, i.e. in the case of Łódź, we have research indicating that for reasons completely independent from political issues, and related to the current development of the city during the years (1983-1993) 41 street names disappeared together with the buildings they determined, while in the existence of the so-called industrial Łódź, so for the last 190 years, about 120 proprietary names have disappeared (Pacan-Bonarek, 2015: 491). Sometimes old street names are subject to a specific recycling process and are used again in a different part of the city (Bieńkowska, Umińska-Tytoń, 212: 241). In the second case mentioned in the study, namely the Andrespol municipal common, we can even mention the disappearance of objects affecting the street name, thus the name of the street will be understandable only for older residents of the locality –eg. Ceramiczna street, where the production plant were once located producing ceramics (eg stove tiles); now, the shopping center is being developed here, so it is completely unrelated to the former character of the place.

The emergence of *patronage* streets, which could carry political meaning and therefore are possible to analyze in the context of considerations regarding collective memory, took place in the Polish reality in the second half of the nineteenth century (Kita, Nartnowicz-Kot, 2012: 5). From that moment, the names of streets in the urban space are perceived as a reflection of reality and the creation of space. In this way, we define and even create the reality that surrounds us. The names present in the urban space indicate who is important enough to perpetuate memory and who is the most important. People/patrons of the main streets in the city must be widely respected and positively evaluated in history (Kita, Nartnowicz-Kot, 2012: 10). Of course, this also works the

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other way, especially after a period of political change, when certain patrons are condemned to be a subject of *damnation memoriae*.

Street nomenclature in cities, especially during its chaotic development, which Łódź experienced at the turn of the 19th and 20th century, was quite chaotic, therefore the City Council in 1933 adopted the principles that were to be adopted, for ensuring the order and to end the previous chaos. Since then, in individual districts of the city, the streets were to commemorate, respectively: social and national activists, particular professions, geographical names, rivers, creators of culture, etc. The exception was Downtown, where this systematization was not applied.

In relation to the nature of urban names, we distinguish: motivated names, non-motivated names and commemorative names. In this case, particular attention should be paid to the last of these categories, which contain names commemorating important facts, events and people (Kita, Nartowicz-Kot, 2012: 10). By and large, they are most vulnerable to change. In Łódź, as well as in Poland, there were several waves of mass changes in names belonging to this category, related to changes with a geopolitical character. The first wave followed Poland's regaining independence in 1918, it resulted from the necessity of removing street names characteristic to tsarist times, although it should be admitted that in the case of Łódź this did not concern a large number of streets. As an example, we can mention there Mikołajewska street (commemorating Tsar Nicholas II [change of name from Dzika street, took place only in 1900]), which still during World War I, paradoxically during the German occupation (1916) was replaced by Henryk Sienkiewicz, (one of the best-known Polish writers who died this year)<sup>24</sup>.

It can even be assumed that fundamental changes in this matter took place between 1916-1918, so after 1918 there was no need to *derussification* of the city. In 1920, the City Council ordered next wave of changes - this time of a ruly nature, eliminating the previous naming chaos, eg previously there used to be four Ciemna [Dark] streets or three Długa [Long] streets. The chaos mentioned resulted from the incorporation of parts of the neighboring settlements to Łódź – eg. Bałuty, which until 1915 remained the largest village in Europe with a population exceeding 100,000 people. Naturally after 1918, there also appeared names referring to the figures or events remembering the Great War and the following time of Poland's fighting for borders. Hence, the streets: Legionów [Piłsudski Legions] appeared; 28 p.p. StrzelcówKaniowskich (28<sup>th</sup> Infantry Regiment *Children of Łódź* - military unit stationed there, also having a Romanian episode in its history). Later during the interwar period, the deceased independence activists –eg. Józef Piłsudski were also commemorated [on previous Wschodnia Street], he received the street which may be not principal but the one associated with his pre-war independence activity. On this street was an illegal printing house, in which he prepared the newspaper of the Polish Socialist Party - Robotnik). Others then commemorated were: Gabriel Narutowicz, the first president of the Second Polish Republic, who was murdered after 10 days at office in December 1922 (Konicki, 1995: 29). Also there were commemorated other activists associated with the Sanacja government (always after their death), eg. Bolesław Pieracki after the murder in 1934.

The next torrent of changes took place during the Second World War, when Łódź remained under German occupation. It was incorporated directly into the Third Reich, then, apart from the germanization of urban onomastics also the city name was changed - Łódź became Litzmannstadt<sup>25</sup>.

After the Second World War, and after the seizure of power by the forces associated with the Soviet Union, there were another changes. Firstly, it reflected the

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administrative needs associated with city expansion to neighboring areas, in particular the city of Ruda Pabianicka, in this case it was about elimination of repeating names. Secondly, it was connected again with the current political and propaganda needs, where the names commemorating the pre-war politicians, the Polish-Bolshevik war, or for other reasons uncomfortable for the new authorities were replaced by names just for the new order. As an anecdote one can treat the literal treatment of the Party's order to change the name of the main street in the city to Stalin Street. The authorities of Łódź, in contrast to other Polish cities, treated this literally, and Stalin became the patron of one of the side streets then, which was called Główna [Main street] [1945-1956]<sup>26</sup>.

Similar changes occurred in the aforementioned period after the 1989, although some cautious street naming after the heroes not necessarily welcome after 1945 was already noticeable in 1988. Then it was associated with the establishing of a large housing quarter in the east of Łódź in the Widzew district (Olechów quarter). A convenient pretext was the 70th anniversary of regaining independence. The street of Marshal Józef Piłsudski appeared for a short time at Olechów.

Spontaneous decommunization of names in Łódź urban space took place in 1989 and 1990. Usually the names of streets from pre-1939 were restored, of course where it was possible and the street did not disappear, or had no other equivalent in the city. The list of all changes made then would exceed the scope of this publication, but there were some major changes that should be mentioned:

<i>name before 1989</i>	<i>name after 1989</i>
Ul. Armii Czerwonej	Al. Marszałka Józefa Piłsudskiego
Obrońców Stalingradu	Legionów
Gen. Karola Świerczewskiego	Radwańska
Armii Ludowej	Polskiej Organizacji Wojskowej [POW]
Stefana Przybyszewskiego	Stanisława Przybyszewskiego
Ernsta Thälmana	Kardynała Stefana Wyszyńskiego
Jana Promińskiego	Marszałka Edwarda Śmigłego Rydza

The attention of the public at that time was focused primarily at objects and centrally located areas, important for various reasons for the city (Bieńkowska, Umińska-Tytoń, 2012: 243). This was due to the fact that, as already mentioned, the then decommunization was conducted rather spontaneously without using any central legal act regulating this issue. Hence, some names honoring the old regime, survived. A possible explanation will be in this case a very short collective memory about the patrons of specific streets, where they were not openly associated with the old regime. They were often local communists, or activists of the socialist movement, whose merits were quickly forgotten after naming the street. Certainly, there also did not help the change of the street identification system in the city at the turn of the millennium. On the new boards, criticized by the residents short comments properly describing a particular character, or an event commemorated in the name of the street, disappeared. This was also maintained during the next change of the visual information system made in the year 2005, this time reflecting the Warsaw model.

The spontaneous de-communization was slightly different in the second of the discussed cases, in the case of the Andrespol commune, in particular in its main settlement. Here, de-communization was initially carried out very modestly, where the only notable change was actually of 30 Years of PRL [Polish People's Republic] to



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Tuszyńska Street (its traditional , directing name). Many names were then left although they were unquestionably associated with the old system, it was explained in double: the habits of the population, and the costs of making changes (mainly the exchange of documents). This situation was also characteristic to many small towns in Poland. It was only *the Act of 2 September 2016 on the prohibition of promoting communism or other totalitarian regime by names of buildings, facilities and public utilities*; that forced the common authorities to act.

The situation related to maintaining names in urban space evidently associated with the previous system remained as arbitrary for each individual local units for a very long period of time, until 2016. We can indicate many reasons explaining such attitude, to those mentioned earlier, you can also add here lack of political consensus about such actions. Only the gaining of full power by *Law and Justice* in 2015 (victory in both presidential and parliamentary elections) opened the gate for further activities related to the broadly understood de-communization of the state, including public space. Currently in Poland, these changes in public space are not the only activities of the aforementioned nature, nevertheless they perfectly fit into the other, more publicized activities that are leading to extensive de-communization, not only personal, but also structural. An important element of such activities is, for example, pursuing reform of the judiciary, perceived by some as an assault on civil liberties, while by advocates of change as an element of state repair, determined quite recently by one of the prominent PO [Civic Platform] activists as a *theoretical state*.

Although, on the one hand, the issue of changes in urban onomastics is not so carefully observed by social organizations dealing with the protection of human rights, etc., however, they arouse understandable interest in the society, especially those who live there. Obviously, but from other reasons, it also arouses interest among local politicians, but they are not so much interested with old patrons but with new heroes /patrons whose selection is usually a derivative of a certain political attitude and reflects the political views of the decision-making body.

Łódź, as a city in which investments were implemented and it creates new communication arteries, experienced even before 2017 some clashes regarding the nomenclature present in the urban space. It should be objectively acknowledged that in the time interval mentioned, i.e. from about 1994 to 2015, if new street names appeared, it was usually attempted to minimize the so-called *costs* for the society. that is, the names were changed in order to be hardly burdensome for the residents. The best example was the change of the name of the southern part of Aleja Włókniarzy to Aleja św. Jana Pawła II [Saint John Paul II Av.], which took place after the death of the Pope and the great Pole on June 8, 2005<sup>27</sup>. In this case, also the necessary prestige has been maintained, because that time this street was part of the main transit route in the North-South relation, on the national scale [National Road No. 1] and at the same time it did not have too many addresses. While the figure of the Holy Father did not raise any controversy, further actions undertaken, for example, in connection with the construction of new streets in investment areas have already aroused controversies. We can indicate here at least three decisions that stir up quite fierce discussions in the city. Two of them concerned industrial areas, where some attempts were made to encourage foreign investors to invest in Łódź by giving the street where the investment was supposed to be, the name honoring the event / person for some reason important to the investor (this can be considered an interesting example of corruption activities ?).

An example of this is the creation of King C. Gillette Street, at the Retkinia district of Łódź, where a factory producing razors for the aforementioned company was built. The first signals indicating such a possibility and with a clearly defined goal - incentives for investments appeared already in 2004, that is three years before the investment<sup>28</sup>. This aroused the inhabitants astonishment, especially as the project was not confirmed at that time. A similar case resulted from another important investment at that time, namely the route leading to the Dell computer assembly plant being built in Łódź. At that time, in order to honor the investor, the councilors decided to name the street leading to the factory as: Ofiar Terroryzmu 11 Września [Victims of September 11 Terrorism]. Here the matter has become so complicated that the investor himself was not very pleased with this gesture, asking for the street to be renamed Dell Street, or another related with IT industry. It was explained in two ways, firstly the name was too long, which could have generated problems in the IT systems (contact details), and secondly the attention was paid to potential problems related to trade with Arab countries, which did not necessarily have to accept this name<sup>29</sup>. Eventually, the city went to the investor on the one hand, leaving the name of Victims of September 11 Terrorism, on the other hand, calling one of the access streets Informatyczna, which satisfied the investor.

On 9 April 2008, the City Council in Łódź, by virtue of Resolution No. XXX / 0586/08 on naming streets, squares and parks, adopted a moratorium on changes applied to existing names. By the same resolution were introduced: the principle of not naming new streets, squares and parks with names of deceased persons within one year from the date of their death; the principle of not giving new streets, squares and parks names of meaning, spelling or sound similar to the names already existing in Łódź.

As already mentioned, changes in names that commemorate specific people or events, important for a specific political camp, but not necessarily accepted by competitors usually cause vivid discussions. In Łódź, the biggest controversy occurred in the period preceding the publication of the 2016 Act, while looking for a patron for one of the new but important streets in the city, opened in 2015, streamlining the transit north-south. For a year, it was called a provisional, but quite neutral name, the Trasa Górna [Górna Route - from the city district], in July 2016 the councillors from the PO proposed to give it the name of Władysław Bartoszewski, a merited Pole and former foreign minister<sup>30</sup>. Applicants expected that the proposal would be acceptable to all interested parties, although they probably had to be aware that Bartoszewski was certainly not the one accepted by the current ruling party [PiS] in the country. As expected, this sparked a fierce discussion, during which the life of the proposed patron was not discussed (although some historians associated with the right side of the political scene consider it quite controversial). The discussion drew attention to another important issue - not carrying out the so-called *public consultations* about the idea. That gave the impression of unnecessary hurry when making a change. Applicants suggested quick naming, arguing that the lack of an official name makes it impossible for individual companies to operate. The PiS councillors suggested that in this case, keeping the provisional name, that residents have already got used to. Ultimately, with the majority of the PO and its minions in the City Council, the proposal was accepted by 24:11<sup>31</sup>.

The legal basis for the new changes is *the Act on the prohibition of promoting communism or other totalitarian regime by names of buildings, facilities and public utilities*. In 2016, the Institute of National Remembrance pointed out that there are 943 streets in Poland to change<sup>32</sup>. A special index of names, which were to be changed automatically was created. There was also left a gate to leave actual name, but the IPN

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had to verify the biography of a given person and finally decide about the fate of a particular street. Mentioned Law was adopted on April 1, 2016, and had taken effect on September 2, 2016. It gave local self-government units a year to adopt the urban space to the requirements of the Act, in other words, to remove elements that promote the totalitarian system (in the Polish case, of course, communist, because denazification was carried out extremely scrupulously in 1945)<sup>33</sup>. In case that the local self-governments did not fulfill their abilities, the appropriate voivode obtained the right to change them on their own. The Act, despite the relatively short period of validity, has already been amended twice. The first time on June 22, 2017, when monuments and educational institutions were also included in scope of its interest. First and foremost, it obliges to remove all commemorations of the Red Army from the public space as a *de facto* force that occupied Poland after 1945. In this sense it completes the actions taken already after 1989, when a large number of such memorials were removed, while the graves of Soviet soldiers which were usually located near the monuments, usually with the military ceremonial were transferred to the appropriate war cemetery. On January 6, 2018, another amendment came into effect, giving the voivode the option of vetoing the resolutions of local councils changing the names of streets or public buildings.

Now in Poland, a certain part of the discourse regarding the shape of collective memory determines several important issues present in the political narrative promoted by the ruling Law and Justice [PiS]. They have also been reflected in discussions on new street names and places of public utility. They are primarily: resistance against the Workers Party government after 1945, i.e. *Damned Soldiers*; the second important element of the narrative is the Smolensk Crash, and especially the commemoration of those who died in it, in particular President Lech Kaczyński, twin brother of PiS leader Jarosław Kaczyński, and his wife Maria. As already mentioned, Łódź is now a specific city, at the moment we have there cohabitation, whereas the City Council is dominated by the PO and its coalition partners, for example from the SLD, while the voivodship is managed by the PiS nominee, though not a formal member of the party - prof. Zbigniew Rau, a lawyer associated with the University of Lodz.

As it was expected, to fulfill the task set out in the act on de-communization, takes place in Łódź in the atmosphere of a political quarrel, in which the issue of proper commemoration in the city of the late President Lech Kaczyński is the axis of the dispute. Because the City Council did not prepare resolutions on changing street names on time (similarly to the majority of local self-governments in Łódzkie Voivodship, where from 171 commons changes have to be made in 71 of them - 44 commons did not take care of it, giving the voivode the free hand)<sup>34</sup>; voivode on December 13, 2017 (symbolic date associated with the anniversary of the imposition of martial law in Poland in 1981) issued the so-called *replacing order* changing 27 street names and one square in Łódź. According to the provisions of the Act, patrons connected with the previous regime were removed, as to which the negative opinion was issued by the Institute of National Remembrance<sup>35</sup>. The voivode commented on the changes as follows: *The following premises were guided by the choice of new street names in Łódź: firstly, characters that fit into our joint efforts to win and maintain independence should be promoted, and secondly they should be significant for national culture and marked by pluralistic Łódź sensitivity*<sup>36</sup>.

While most of the changes made were not controversial, the City Council practically vetoed Lech Kaczyński Square, which replaced Plac Zwycięstwa, this change was assessed as particularly negative by the City Council. There curious is the fact that Victory Square (over Germany in 1945) itself was not negatively verified by the Institute

of National Remembrance. City councilors indicated that there was no need to make this change, while even if there were some doubts, it was possible to change the name into traditional (official until 1945 – Wodny Rynek [Water Market]), and still present in the consciousness of the inhabitants of Lodz, or act as it was done in the early 90's, for example with Stefan Przybyszewski street, turning it into Stanisław Przybyszewski; in this case leaving the name, but with a different justification. One of the councilors associated with the Civic Platform stated directly that: *we do not want Lech Kaczyński's cult in Łódź*<sup>37</sup>. In the assessment of forces removed from power in 2015, the new Law created mechanisms enabling the party in power to properly shape the politics of memory by giving voivode (government nominees) the real influence on shaping the urban space, so something that was previously reserved for local self-governments. On the other hand, the argument should be raised that the City Council had, according to the Law, time to introduce its own proposals, perhaps even more *in line* with the PO's vision, but if it did not, then gave the voivode the free hand. It was the second attempt to commemorate the tragically deceased President in the city. First time it happened in 2014, when one of the city squares located in the city center for a short time bore his name<sup>38</sup>.

Eventually, the City Council decided to maintain the old name, but with a different justification - this time the term Victory was to refer to the victory over the Bolsheviks in 1920. The City Council changed voted it in a hurry on 4th January 2018, practically at the last minute before the entrance into force of amendment to the Law, which was supposed to block the possibility of making changes by the Council. Now the voivode and local branch of the Institute of National Remembrance have to agree<sup>39</sup>. Eventually, the voivode published this decision, but he announced its in-depth legal verification, which is an expression of the obvious *quasi-guerilla* war between him and the City Council. What's more, some councilors began to question the validity of the other changes, arguing that is also due to the social consultations. In this case, however, the City Council had a chance to make changes (there was an annual *vacatio legis*), since this was not used, the current questions are a manifestation of a political activity - it is easier to criticize the changes already made than to initiate them<sup>40</sup>.

Noting the general changes announced by the governor on December 13, 2017 and attempting to indicate the collective memory version, whether the appropriate narrative model promoted in this ordinance. It should be noted that indeed there are names associated with the already mentioned narrative commemorating the anti-communist underground functioning after 1945. - the street of Konspiracyjnego Wojska Polskiego [the Polish Army in the Conspiracy] (former Leona Kruczkowskiego), although the names that are more often associated with the anti-communist opposition, however, operating over a longer period of time, prevail. Commemorated are: universal figures, widely known such as: Andrei Sakharov, Bulat Okudzhava, or characters, movements and events known rather in Poland, for example Anna Walentynowicz<sup>41</sup> (also the victim of the Smolensk crash), Ferdynand Ossendowski<sup>42</sup>, and Solidarność Walcząca [Fighting Solidarity]<sup>43</sup>. Commemorated were also people known locally, but active in the anti-communist opposition - such as Jacek Berzin. A separate category are people associated with Łódź, born there, but also related to its promotion, such as Karl Dedecius; commemorated were also people of culture in some form associated with Łódź - Ira Aldridge (Kujawińska-Courtney 2009: 290)<sup>44</sup>, Kazimierz Dejmek, or universal characters, outstanding creators of culture as: Czesław Miłosz, Zbigniew Herbert or Wojciech Kilar. It was also used to commemorate events associated locally but nevertheless important to the Łódź community. An example of this is the commemoration of the so-called Little Fifteen [Mała

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Piętnastka], a Girl Scouts Troop operating in the city, whose members were killed in a tragic accident in the early 1950s. An interesting fact is also the commemoration of one of the most famous Western genre actors, but also strong anti-communist - John Wayne.

In this case, the general intention is to commemorate people and events of universal character, however, associated with anti-communist resistance, although not always directly. The vast majority have been commemorated with people important for the promotion of Poland in the world at different times, which proves the willingness to mark in the present collective memory rather uncontroversial people who are univocally associated with Poland or solidarise with this country. At the local level, there is also a willingness to appreciate people who actively contributed to the promotion of the city in the international arena (Karl Dedecius), or rather passive, like Ira Aldridge, who died in Łódź before his first appearance in 1867, but thanks to that probably a large part of the world even heard about such a place in the world. The very fact of streets decommunization did not cause much discussion in the city, no one defended the erased patrons, moreover in most cases these were names of long forgotten people, that even people who are professionally connected with the city's history could not say much about them. The only exception was the street of Michalina Tatarkówna-Majkowska, the former first secretary of the Workers Party Łódź Committee between 1955-1964. Tatarkówna-Majkowska was assessed positively by the majority of Lodz inhabitants, as a person devoted to working class (especially women, whom she prevented from work at night) and to all city residents - she objected effectively against the building in Łódź flats equipped only with so-called *blind kitchen* (without a window), which are the mark of housing from the 1960s in other Polish cities. In spite of this, the street was also decommunized, it was turned into the legendary leader of Solidarity - Anna Walentynowicz.

The term *decommunization* is also related to the naming of urban facilities, including primarily sports facilities, but also with the issue of commemorating people who have contributed to the sport in Łódź. In connection with the above-mentioned decommunization Law, serious doubts arose about the commemoration of the legendary chairman of Widzew Łódź, Ludwik Sobolewski. As part of the municipal investments selected for implementation in 2016, the *civic budget* included a monument dedicated to him, which was to be erected near the deeply reconstructed, or rather newly built, stadium used by club<sup>45</sup>. Eventually, despite the fact that the stadium was opened in March 2017, the monument has not been created until today. As it turned out, this was the aftermath of the de-Communization Act. The Institute of National Remembrance in its archives confirmed that Sobolewski, in the 1940s and 1950s, was an Internal Security Corps (KBW) officer, something that was rather unheard of in a club-related society so far<sup>46</sup>. Therefore, it was decided to change the concept and the monument to be created next to the stadium will be devoted to the creators of the *Great Widzew*<sup>47</sup>, which is certainly more neutral formula, not requiring consultation with other institutions, and also commemorating the greater number of people actually involved in the club (Wawrzynowski, 2013: 77-78). This example shows that the act of de-communization also affects the possibility of commemorating people who were not necessarily involved in politics. It is also an important element of the discussion about officials and sportsmen and their connection with the authorities, in the PRL but also generally in the socialist camp (Majchrzak, 2017).

An important, though not the most popular, element of shaping collective memory at the local level in Łódź is the commemoration of people who have indeed created the city. It is connected with the issue of naming the new streets, which appeared

on the occasion of the reconstruction of the city center near reconstructed Łódź Fabryczna train station and the so-called New Center of Łódź. This time there was no controversy and streets surrounding the new station commemorate families that contributed to the development of Lodz in the nineteenth and twentieth centuries<sup>48</sup>. In addition, this highlights the popular aspect of multiculturalism, because among the nineteenth century industrialists we find: Poles, Germans and Jews. Similarly can be qualified, the Włodzimierz Smolarek street at the already mentioned Widzew stadium. It commemorates, the Widzew, Eintracht Frankfurt, Feyenoord Rotterdam and the Polish national team player who died in 2012. In this case, there was no controversy and the City Council adopted the relevant resolution unanimously<sup>49</sup>. In all, there should be mentioned that the legends of the second club in Łódź - ŁKS are also commemorated with street names – eg. Władysław Król<sup>50</sup> (Bieńkowska, Umińska-Tytoń, 2012: 89).

To sum up, it should be emphasized that the naming of the urban structure is certainly an important testimony of the era. Street names in Łódź have changed many times, especially after periods of historical turmoil associated with: both world wars, or finally the collapse of the so-called *people's democracy*. In each of these cases, the municipal authorities tried to commemorate people or events important for a specific era. This statement will be universal both for large cities (Łódź) and surrounding municipalities (Andrespol). On the other hand, the scale of changes will be different, when in smaller settlements usually limited to the necessary minimum, while in larger cities it took place on a wider scale. However, as it has been shown, at the end of 2017, it was not carried out in a satisfactory manner. The last wave of changes was enforced by the de-communization Law, which had to be applied both in Łódź and in neighboring towns. Nevertheless, in the province, the local councils tried to name the streets rather by neutral names, in the city the process of change triggered political struggle and reflected in the dispute over shaping collective memory. Above all, controversy aroused (not only in Lodz) with the city urban tissue named after Lech Kaczyński, which in the opinion of critics from the opposition is to be an element of building the cult of this politician. Interestingly, the commemoration of other victims of the Smolensk crash in Lodz did not arouse any controversy. The Law also did not spare people connected with sport, but in this case on the one hand it is the result of complicated human fate after World War II, and on the other hand of the specificity of sport management in the Eastern Bloc.<sup>51</sup>

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<sup>22</sup> Ustawa z dnia 1 kwietnia 2016 r. o zakazie propagowania komunizmu lub innego ustroju totalitarnego przez nazwy budowli, obiektów i urządzeń użyteczności publicznej. *Dziennik Ustaw RP* 1 czerwca 2016, poz. 744., [Law forbidding the propagation of communism or other totalitarian regime through the naming of buildings, and other items present in public space. 1st April 2016]. Retrieved from: <http://prawo.sejm.gov.pl/isap.nsf/download.xsp/WDU2016000744/O/D20160744.pdf> (11 01 2018)

<sup>23</sup> P. Toczyski, 30% Polaków przywiązuje wagę do patronów ulic, [30% of Poles cares about their street patrons] Retrieved from: [http://wyborcza.pl/duzyformat/1,127290,14625829,30\\_\\_Polakow\\_przywiazuje\\_wage\\_do\\_patronow\\_ulic.html](http://wyborcza.pl/duzyformat/1,127290,14625829,30__Polakow_przywiazuje_wage_do_patronow_ulic.html) (11 01 2018).

<sup>24</sup> It is worth to mention there about the completely different character of the German occupation during World War I, in comparison to that during the Second World War. While in the first case, the Germans tried to act as *de facto* allies of the Poles and allowed manifestation of Polish patriotism (calculated pragmatically for recruitment of the troops), which found its peak even in the proclamation of the Kingdom of Poland on November 5, 1916 (act differently evaluated, but with indisputable consequence as was the internationalization of the Polish cause and confirmation of creation of a Polish state after the war; absent since 1795).

<sup>25</sup> Commemoration of German general, Karl von Litzmann (1850-1936), commander of the German 3<sup>rd</sup> Infantry Division, who won the Łódź battle in 1914 against the Russian troops.

26 As the real main avenue in the city Piotrkowska street is commonly considered.

27 Uchwała Nr L/896/05, Rady Miejskiej w Łodzi z dnia 8 czerwca 2005 r., [Resolution Nr L/896/05 of Łódź City Council, 8th June 2005], Retrieved from: <http://archiwum.bip.uml.lodz.pl/index.php?Str=83&id=16596>, (11 01 2018).

28 (Kup), Czy będzie ulica Kinga C. Gillette?, [King C. Gillette street appears?], Retrieved from: <http://lodz.naszemiasto.pl/archiwum/czy-bedzie-ulica-kinga-c-gillette,768440,art,t,id,tm.html>. (21 02 2018).

29 W. Gnacikowska, Dell chce mieć swoją ulicę, [Dell wishes to have it's own street], Retrieved from: <http://lodz.wyborcza.pl/lodz/1,35136,4652392.html>. (21 02 2018).

30 There were also other suggestions, eg. *Vaclav Havel*.

31 P. Brzóska, Trasa Górna będzie aleją Władysława Bartoszewskiego, [Górna Route became Bartoszewskiego Avenue], Retrieved from: <http://www.dzienniklodzki.pl/wiadomosci/lodz/a/trasa-gorna-bedzie-aleja-wladyslawa-bartoszewskiego,10576710/> (11 1 2018).

<sup>32</sup> kch, adom, Setki nazw ulic do zmiany. Propagują ustroje totalitarne. [Hundreds of streets should be renamed, they propagate the totalitarian regime]. Retrieved from: <http://www.tvp.info/33833586/setki-nazw-ulic-do-zmiany-propaguja-ustroje-totalitarne>. (30 03 2018).

<sup>33</sup> Art. 6. Ustawa z dnia 1 kwietnia 2016 r ... [Law forbidding ...].

<sup>34</sup> msm, Kiedy dekomunizacja ulic w Łodzi, [When will the decommunization in Łódź begin], Retrieved from: <http://www.expressilustrowany.pl/lodz/a/kiedy-dekomunizacja-nazw-ulic-w-lodzi,12571654/>, (11 1 2018).

<sup>35</sup> which is an institution that deals with de-communization, but also research on the past system.

<sup>36</sup> Dekomunizacja 28 łódzkich ulic. Powstanie m.in. pl. Lecha Kaczyńskiego, ul. Miłosza i John'a Wayne'a [Decommunization of 28 streets in Łódź. Lech Kaczyński Square and John Wayne street will be created], Retrieved from: <https://www.tulodz.com/wiadomosci,dekomunizacja-28-lodzkich-ulic-powstanie-m-in-pl-lecha-kaczynskiego-ul-milosza-i-john-a-wayne-a,wia5-3266-5513.html> (11 01 2018).

<sup>37</sup> bż/mś, Wojewoda zmienił plac Zwycięstwa na plac Kaczyńskiego. Łódzcy radni przywrócili starą nazwę. [Voivode has substituted the Victory Square with Lech Kaczyński Square. City councilors have the old name brought back], Retrieved from: <https://www.tvn24.pl/lodz,69/przemianowali-plac-lecha-kaczynskiego-po-czterech-dniach,803885.html>. (14 02 2018).

<sup>38</sup> M. Darda, W Łodzi jest już skwer im. Lecha Kaczyńskiego, [We have Lech Kaczyński square in Łódź] Retrieved from: <http://www.dzienniklodzki.pl/arttykul/3390747,w-lodzi-jest-juz-skwer-im-lecha-kaczynskiego,id,t.html>, (12 I 2018).

<sup>39</sup> W. Gnacikowska, Nie ma już w Łodzi Placu Lecha Kaczyńskiego. Wrócił Plac Zwycięstwa. Zdążyli przed IPN, [There is no Lech Kaczyński square, Victory Square is back. They managed do it in time]. Retrieved from:

<https://oko.press/juz-lodzi-placu-lecha-kaczynskiego-wrocil-plac-zwyciestwa-zdazyli-ipn/>, (15 I 2018).

<sup>40</sup> T. Talaga, Rada wojewodzie nie rada, wojewoda przeciw Radzie. Wojny o nazwy ulic ciągnie dalej [The Council dislikes voivode. Voivode strikes back. War about streets names lasts], Retrieved from: <https://www.tulodz.com/wiadomosci,rada-wojewodzie-nie-rada-wojewoda-przeciw-radzie-wojny-o-nazwy-ulic-ciagnie-dalzy-wideo,wia5-3266-6286.html> [27.01.2018].

<sup>41</sup> Anna Walentynowicz (1929-2010), one of the very first Solidarity leaders. Firing her from the Gdańsk Shipyard was the cause of strike, which finally ended in emerging of Solidarity movement.

<sup>42</sup> Ferdynand Ossendowski (1878-1945), writer, adventurer, *Lenin's personal enemy*. He popularized the truth about Lenin's collaboration with Central Powers. The author of unauthorized Lenin's biography *Lenin* [Romanian edition: *Lenin : Dumnezeul celor fără Dumnezeu*, Brăila 2015, trans. Nicolae Drăgușin]. His book about escape from revolutionary Russia *Beasts, Men and Gods*, was translated into 19 languages [Romanian edition: *Animale, oameni și zei*, București 1994, trans from French. S. Lupașcu i M. Romanică]. Taking into account the quantity he is second only to Henryk Sienkiewicz best known Polish writer in the world.

<sup>43</sup> Solidarność Walcząca (Fighting Solidarity) – was the radical organization created after the dissolution of Solidarity by government in December 1981.

<sup>44</sup> Ira Aldridge (1807-1867), well known American African shakespearean actor, who died in Łódź. K. Kujawińska-Courtney, Ira Aldridge (1807-1867), *dzieje pierwszego czarnoskórego tragika szekspirowskiego*, 2009, ss. 320

<sup>45</sup> It was nevertheless supported by the inhabitants of the city.

<sup>46</sup> IPN zablokuje powstanie pomnika Ludwika Sobolewskiego? [Will IPN block erecting of Ludwik Sobolewski statue?]. Retrieved from: <http://www.derbylodzi.pl/news/510/ipn-zablokuje-powstanie-pomnika-ludwika-sobolewskiego/>. (13 I 2018).

<sup>47</sup> Kamil, Nowe ustalenia w sprawie pomnika Ludwika Sobolewskiego, [New arrangements in case of Ludwik Sobolewski statue]. Retrieved from: <http://www.widzewtomy.net/aktualnosci/nowe-ustalenia-sprawie-pomnika-ludwika-sobolewskiego/>. (13 I 2018).

<sup>48</sup> Sz. Bujalski, Nowe Centrum Łodzi. Pierwsze ulice nazwane. Są duże kontrowersje. [New Center of Łódź. First streets named. There are big controversies]. Retrieved from: <http://lodz.wyborcza.pl/lodz/1,35136,21230786,pierwsze-ulice-w-ncl-nazwane-ale-sa-duze-kontrowersje.html> (13 01 2018).

<sup>49</sup> B. Jankowski, Jednomyslność w Radzie Miejskiej. Włodzimierz Smolarek patronem ulicy przy stadionie Widzewa, [Unanimous vote in City Council. Włodzimierz Smolarek has his street near the Widzew Stadium], Retrieved from: <https://www.tulodz.com/wiadomosci,jednomyslność-w-radzie-miejskiej-włodzimierz-smolarek-patronem-ulicy-przy-stadionie-widzewa,wia5-3270-1196.html> (13 I 2018).

<sup>50</sup> Władysław Król (1907-1991) – football and ice hockey player. Played in ŁKS between 1928-1946 [except 1939-1945]. Also football and ice hockey coach in this club. As a coach won the Polish Championship in football with his club in 1958. Played ice hockey in 1936 Olympics, designated also to play in 1940 Olympic football tournament.

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**CEPOS NEW CALL FOR PAPERS 2019**  
**9<sup>TH</sup> INTERNATIONAL CONFERENCE**  
**AFTER COMMUNISM. EAST AND WEST**  
**UNDER SCRUTINY**

Craiova (Romania), House of the University,  
29-30 March 2019

*Dear Colleagues,*

*We are delighted to invite you to participate in the 8th International Conference AFTER COMMUNISM. EAST AND WEST UNDER SCRUTINY in Craiova, Romania, 29-30 March 2019. More than two decades after, an event is both history and present. The annual conference organized by CEPOS involves both the perspectives of the researches in the field of Communism and Post-Communism: research experiences and scientific knowledge. Like a "pointing puzzle", 30 years after the fall of communism, the conference panels explore emotional detachments, but also a peculiar involvement creating and exploiting the inter-disciplinary developments of the East-West relations before and after the crucial year 1989 in the fields such as: political sciences, history, economics and law. The conference will be hosted by the University House and during two intense and exciting days, participants all over the world (professors, professionals, doctoral and post-doctoral researchers) are invited to raise the issue of the study of recent history of the former communist space in connection with the Western world. We are confident that all of us will focus during these two days on what is important to move the research in the field forward. We dear to state that we even bear the moral obligation to do that.*

Best regards,

The Board of Directors of CEPOS 2019 Conferences and Events Series

**PROPOSED PANELS for CEPOS CONFERENCE 2019**

Center of Post-Communist Political Studies (CEPOS) proposes the following panels:

- Political culture, civil society and citizen participation
- History, politics and ideologies in modern and contemporary Europe;
- Communism, transition, democracy;
- Post-communism and collective memory;
- Social changes, political history and collective memory
- Politics, ideologies and social action in transition;
- Revolution and political history;
- Political culture and citizen participation

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- Law, legal studies and justice reform;
- Law, transitional justice, democratization;
- Constitution(s), legality & political reforms;
- Political parties, electoral systems and electoral campaigns;
- Security and diplomacy in national and Euro-Atlantic environment;
- Rights, identities policies & participation;
- Education, media & social communication;
- Education, social inclusion and regional policies;
- Administrative history and governance within South-Eastern Europe during transition;
- Political leadership, democratization and regional security;
- Comparative policies, sustainable growth and urban planning;
- Knowledge transfer and competitiveness in regional economies;
- Global environment and cultural heritage;
- Integration, identity, and human rights in European systems;
- Religion, cultural history and education;
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### **ABSTRACT SUBMITTING (SEE CEPOS CONFERENCE 2019 REGISTRATION FORM-on <http://cepos.eu/>)**

The proposals must be sent in English and must contain the title of the paper, the abstract (no more than 300 words) and a short presentation of the author(s) (statute, institutional affiliation, short list of relevant scientific contributions).

### **DEAD-LINE FOR SUBMITTING A PROPOSAL: 15 MARCH 2019**

Proposals must be submitted until 15 MARCH 2019 at the following address: [cepos2013@gmail.com](mailto:cepos2013@gmail.com)

### **CONFERENCE VENUE**

Casa Universitarilor/University House (57 Unirii Street, Craiova, Romania). You can view the Conference location and a map at the following address: <http://www.casa-universitarilor.ro/>

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### **CEPOS CONFERENCE PAST EDITIONS**

More information, photos and other details about the previous editions of the Conference and CEPOS Workshops, Internships, and other official events organized in 2012-2018 are available on:

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## TRANSPORT

The 9th International Conference "After communism. East and West under Scrutiny" (2019) will be held in Craiova, a city located in the South-Western part of Romania, at about 250 km from Bucharest, the national capital. The airport of Craiova (<http://en.aeroportcraiova.ro/>) has flights to Timisoara, Dusseldorf, Munchen, Ancone, Rome, Venezia, London, Bergamo etc. Other airports, such as Bucharest (Romania) (<http://www.aeroportul-otopeni.info/>) is located at distances less than 240 km from Craiova and accommodate international flights. Train schedule to Craiova can be consulted at InterRegio CFR (<http://www.infofer.ro/>) and SOFTRANS (<http://softrans.ro/mersul-trenurilor.html>).

## CEPOS CONFERENCE 2019 FEES AND REGISTRATION REGISTRATION DESK

The Conference Registration Desk will be opened from Friday, 29th of March 2019 (from 08.00 a.m. to 18.00 p.m.) until Saturday 30th of March 2019 (from 08.00 a.m. until 14.00 p.m.), for registration and delivery of conference bag with documents to participants. The Conference Registration Desk is located in the lobby of the University House Club, 1st Floor.

## REGISTRATION FEES

90 euros/paper can be paid directly via bank transfer on CEPOS Bank account as follows:  
Details for online payment

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## MEALS AND OTHER ORGANIZING DETAILS

The registration fee covers:

- \* Conference attendance to all common sessions, individual and special panels
- \* Conference materials (including a printed version of the Book of Abstracts of the Conference)
- \* Conference special bag - 1 for every single fee paid, no matter the number of authors/paper
- \* Coffee Breaks-March 29, 2019 – March 30, 2019. During the two days conference, 3 coffee breaks are offered.
- \* Welcome reception (March 29, 2019)
- \* Lunch (March 29, 2019) offered in the University House Mihai Eminescu Gala Room
- \* A Festive Gala Dinner and Cocktail (March 29, 2019) offered in the University House Mihai Eminescu Gala Room
- \* A Free Cocktail Buffet will be served from 19:00 p.m. to 21.00 p.m.
- \* A Free Entrance Voucher is provided inside of each Conference Bag.
- \* Lunch (March 30, 2019)
- \* Certificate of attendance (offered at the end of the conference March 30, 2019)
- \* Publication of the Conference Papers in the International Indexed Journal Revista de Stiinte Politice. Revue des Sciences Politiques (previous publication of the 2012-2018 Conference papers is available at

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<http://cis01.central.ucv.ro/revistadestiintepolitice/acces.php>

\* One original volume of the International Indexed Journal Revista de Stiinte Politice. Revue des Sciences Politiques (where the personal conference paper was published) will be delivered to the authors (an additional fee of 10 euros is required for the mailing facilities)

\* Computer & Internet Facilities. There is available videoprojector and connection to Internet services.

\* Language. The official language of the Conference will be English. The Organizing Committee does not provide simultaneous translation.

### **NEW! FREE SOCIAL AND CULTURAL PROGRAMME OF THE CEPOS CONFERENCE 2019**

\* Participants in CEPOS CONFERENCE 2018 have free acces to the Social and Cultural Program of the Seventh Edition of the International Conference After Communism. East and West under Scrutiny, Craiova, 29-30 March 2019: including free guided tours of the: Craiova Old City Tour and CEPOS Headquarters Museum of Arts Craiova, [http://www.muzeuldeartacraiova.ro/Oltenia Museum \(all sections included\):](http://www.muzeuldeartacraiova.ro/Oltenia Museum (all sections included):) <http://www.muzeulolteniei.ro/index.php?view=content&c=26> Casa Baniei <http://www.muzeulolteniei.ro/index.php?view=content&c=26>

### **CERTIFICATES OF ATTENDANCE**

Certificates of attendance will be offered at the end of the conference on Saturday, March 30, 2019

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[http://mobil.ub.uni-koeln.de/IPS?SERVICE=TEMPLATE&SUBSERVICE=EZB\\_BROWSE&SID=PETERSPFENNIG:1460334557&LOCATION=USB&VIEW=USB:Kataloge&BIBID=USBK&COLORS=7&LANGUAGE=de&PAGE=detail&QUERY\\_URL=jour\\_id%3D111736&REDIRECT=1](http://mobil.ub.uni-koeln.de/IPS?SERVICE=TEMPLATE&SUBSERVICE=EZB_BROWSE&SID=PETERSPFENNIG:1460334557&LOCATION=USB&VIEW=USB:Kataloge&BIBID=USBK&COLORS=7&LANGUAGE=de&PAGE=detail&QUERY_URL=jour_id%3D111736&REDIRECT=1)

Biblioteca Electronica de Ciencia y Tecnologia

[http://www.biblioteca.mincyt.gob.ar/revistas/index?subarea=148&area=34&gran\\_area=5&browseType=discipline&Journals\\_page=17](http://www.biblioteca.mincyt.gob.ar/revistas/index?subarea=148&area=34&gran_area=5&browseType=discipline&Journals_page=17)

University of Huddersfield UK

<http://library.hud.ac.uk/summon/360list.html>

Saarlandische Universitäts- und Landesbibliothek Germany

<http://www.sulb.uni-saarland.de/index.php?id=141&libconnect%5Bjourid%5D=111736>  
EKP Publications

<http://www.sulb.uni-saarland.de/index.php?id=141&libconnect%5Bjourid%5D=111736>

OHSU Library

<http://www.ohsu.edu/library/ejournals/staticpages/ejnlr.shtml>

Valley City State University

<http://www.ohsu.edu/library/ejournals/staticpages/ejnlr.shtml>

Centro de Investigaciones Sociologicas, Spain

<http://www.cis.es/cis/export/sites/default/->

Archivos/Revistas\_de\_libre\_acceso\_xseptiembre\_2010x.pdf

Drexel Libraries

<http://innoserv.library.drexel.edu:2082/search~S9?/aUniversitatea+%22Babe%7Bu0219%7D-Bolyai.%22/auniversitatea+babes+bolyai/-3%2C-1%2C0%2CB/marc&FF=auniversitatea+din+craiova+catedra+de+stiinte+politice&1%2C1%2C>

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Impact Factor Poland

<http://impactfactor.pl/czasopisma/21722-revista-de-stiinte-politice-revue-des-sciences-politiques>

Pol-index

<http://catalogue.univ-angers.fr/OPD01/86/61/40/00/OPD01.000458661.html>

ILAN University Library

[http://muse.niu.edu.tw:8080/1cate/?rft\\_val\\_fmt=publisher&pubid=ucvpress&set.user.locale=en\\_US](http://muse.niu.edu.tw:8080/1cate/?rft_val_fmt=publisher&pubid=ucvpress&set.user.locale=en_US)

Dowling College Library

<http://www.dowling.edu/library/journaldb/keyword4.asp?jname=revista>

Universite Laval

[http://sfx.bibl.ulaval.ca:9003/sfx\\_local?url\\_ver=Z39.88-2004&url\\_ctx\\_fmt=info:ofi/fmt:kev:mtx:ctx&ctx\\_enc=info:ofi/enc:UTF-8&ctx\\_ver=Z39.88-2004&rft\\_id=info:sid/sfxit.com:azlist&sfx.ignore\\_date\\_threshold=1&rft.object\\_id=100000000726583&rft.object\\_portfolio\\_id=&svc.fulltext=yes](http://sfx.bibl.ulaval.ca:9003/sfx_local?url_ver=Z39.88-2004&url_ctx_fmt=info:ofi/fmt:kev:mtx:ctx&ctx_enc=info:ofi/enc:UTF-8&ctx_ver=Z39.88-2004&rft_id=info:sid/sfxit.com:azlist&sfx.ignore_date_threshold=1&rft.object_id=100000000726583&rft.object_portfolio_id=&svc.fulltext=yes)

For more details about the past issues and international abstracting and indexing, please visit the journal website at the following address:

<http://cis01.central.ucv.ro/revistadestiintepolitice/acces.php>.

### **CONFERENCE INTERNATIONAL INDEXING OF THE PAST EDITIONS (2014-2018)**

#### **CEPOS Conference 2018**

The Eighth International Conference After Communism. East and West under Scrutiny (Craiova, House of the University, 23-24 March 2018) was evaluated and accepted for indexing in 15 international databases, catalogues and NGO's databases:

Conference Alerts, <https://conferencealerts.com/show-event?id=186626>

Sciencesdz, <http://www.sciencedz.net/conference/29484-8th-international-conference-after-communism-east-and-west-under-scrutiny>

ManuscriptLink,

<https://manuscriptlink.com/cfp/detail?cfpId=AYAXKVAR46277063&type=event>

Maspolitiques, <http://www.maspolitiques.com/ar/index.php/en/1154-8th-international-conference-after-communism-east-and-west-under-scrutiny>

Aconf, [https://www.aconf.org/conf\\_112399.html](https://www.aconf.org/conf_112399.html)

Call4paper, <https://call4paper.com/listByCity?type=event&city=3025&count=count>

Eventegg, <https://eventegg.com/cepos/>

10 times, <https://10times.com/after-communism-east-and-west-under-scrutiny>

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Biblioteca de Sociologie, <http://bibliotecadesociologie.ro/cfp-cepos-after-communism-east-and-west-under-scrutiny-craiova-2018/>  
 Science Research Association <http://www.scirea.org/topiclisting?conferenceTopicId=5>  
 ResearcherBook <http://researcherbook.com/country/Romania>  
 Conference Search Net, <http://conferencesearch.net/en/29484-8th-international-conference-after-communism-east-and-west-under-scrutiny>  
 SchoolandCollegeListings,  
<https://www.schoolandcollegelistings.com/RO/Craiova/485957361454074/Center-of-Post-Communist-Political-Studies-CEPOS>  
 Vepub conference, <http://www.vepub.com/conferences-view/8th-International-Conference-After-Communism.-East-and-West-under-Scrutiny/bC9aUE5rcHN0ZmpkYU9nTHJzUkRmdz09/>  
 Geopolitika Hungary, <http://www.geopolitika.hu/event/8th-international-conference-after-communism-east-and-west-under-scrutiny/>

### **CEPOS Conference 2017**

The Seventh International Conference After Communism. East and West under Scrutiny (Craiova, House of the University, 24-25March 2017) was evaluated and accepted for indexing in 10 international databases, catalogues and NGO's databases: Ethic & International Affairs (Carnegie Council), Cambridge University Press-<https://www.ethicsandinternationalaffairs.org/2016/upcoming-conferences-interest-2016-2017/>

ELSEVIER	GLOBAL	EVENTS
LIST <a href="http://www.globaleventslist.elsevier.com/events/2017/03/7th-international-conference-after-communism-east-and-west-under-scrutiny">http://www.globaleventslist.elsevier.com/events/2017/03/7th-international-conference-after-communism-east-and-west-under-scrutiny</a>		
CONFERENCE	ALERTS- <a href="http://www.conferencealerts.com/show-event?id=171792">http://www.conferencealerts.com/show-event?id=171792</a>	
10TIMES.COM- <a href="http://10times.com/after-communism-east-and-west-under-scrutiny">http://10times.com/after-communism-east-and-west-under-scrutiny</a>		
Hiway Conference Discovery System- <a href="http://www.hicds.cn/meeting/detail/45826124">http://www.hicds.cn/meeting/detail/45826124</a>		
Geopolitika	(Hungary)- <a href="http://www.geopolitika.hu/event/7th-international-conference-after-communism-east-and-west-under-scrutiny/">http://www.geopolitika.hu/event/7th-international-conference-after-communism-east-and-west-under-scrutiny/</a>	
Academic.net- <a href="http://www.academic.net/show-24-4103-1.html">http://www.academic.net/show-24-4103-1.html</a>		
World	University	Directory-
<a href="http://www.worlduniversitydirectory.com/conferencedetail.php?AgentID=2001769">http://www.worlduniversitydirectory.com/conferencedetail.php?AgentID=2001769</a>		
Science	Research	Association-
<a href="http://www.scirea.org/conferenceinfo?conferenceId=35290">http://www.scirea.org/conferenceinfo?conferenceId=35290</a>		
Science Social Community- <a href="https://www.science-community.org/ru/node/174892">https://www.science-community.org/ru/node/174892</a>		

### **CEPOS Conference 2016**

The Sixth International Conference After Communism. East and West under Scrutiny (Craiova, House of the University, 8-9 April 2016) was evaluated and accepted for indexing in the following international databases, catalogues and NGO's databases:

ELSEVIER	GLOBAL	EVENTS-
<a href="http://www.globaleventslist.elsevier.com/events/2016/04/6th-international-conference-after-communism-east-and-west-under-scrutiny/">http://www.globaleventslist.elsevier.com/events/2016/04/6th-international-conference-after-communism-east-and-west-under-scrutiny/</a>		

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Oxford Journals – Oxford Journal of Church & State-  
<http://jcs.oxfordjournals.org/content/early/2016/02/06/jcs.csv121.extract>  
Conference Alerts-<http://www.conferencealerts.com/country-listing?country=Romania>  
Conferences-In - <http://conferences-in.com/conference/romania/2016/economics/6th-international-conference-after-communism-east-and-west-under-scrutiny/>  
Socmag.net - <http://www.socmag.net/?p=1562>  
African Journal of Political Sciences-  
[http://www.maspolitiques.com/mas/index.php?option=com\\_content&view=article&id=450:-securitee-&catid=2:2010-12-09-22-47-00&Itemid=4#.VjUI5PnhCUk](http://www.maspolitiques.com/mas/index.php?option=com_content&view=article&id=450:-securitee-&catid=2:2010-12-09-22-47-00&Itemid=4#.VjUI5PnhCUk)  
Researchgate-  
[https://www.researchgate.net/publication/283151988\\_Call\\_for\\_Papers\\_6TH\\_International\\_Conference\\_After\\_Communism\\_East\\_and\\_West\\_under\\_Scrutiny\\_8-9\\_April\\_2016\\_Craiova\\_Romania](https://www.researchgate.net/publication/283151988_Call_for_Papers_6TH_International_Conference_After_Communism_East_and_West_under_Scrutiny_8-9_April_2016_Craiova_Romania)  
World Conference Alerts-  
<http://www.worldconferencealerts.com/ConferenceDetail.php?EVENT=WLD1442>  
Edu events-<http://eduevents.eu/listings/6th-international-conference-after-communism-east-and-west-under-scrutiny/>  
Esocsci.org-<http://www.esocsci.org.nz/events/list/>  
Sciencedz.net-<http://www.sciencedz.net/index.php?topic=events&page=53>  
Science-community.org-<http://www.science-community.org/ru/node/164404/?did=070216>

### CEPOS Conference 2015

The Fifth International Conference After Communism. East and West under Scrutiny (Craiova, House of the University, 24-25 April 2015) was evaluated and accepted for indexing in 15 international databases, catalogues and NGO's databases:

THE ATLANTIC COUNCIL OF CANADA, CANADA-  
<http://natocouncil.ca/events/international-conferences/>  
ELSEVIER GLOBAL EVENTS LIST-  
<http://www.globaleventslist.elsevier.com/events/2015/04/fifth-international-conf>  
GCONFERENCE.NET-  
[http://www.gconference.net/eng/conference\\_view.html?no=47485&catalog=1&cata=018&co\\_kind=&co\\_type=&pageno=1&conf\\_cata=01](http://www.gconference.net/eng/conference_view.html?no=47485&catalog=1&cata=018&co_kind=&co_type=&pageno=1&conf_cata=01)  
CONFERENCE BIOXBIO-<http://conference.bioxbio.com/location/romania>  
10 TIMES-<http://10times.com/romania>  
CONFERENCE ALERTS-<http://www.conferencealerts.com/country-listing?country=Romania>  
<http://www.iem.ro/orizont2020/wp-content/uploads/2014/12/lista-3-conferinte-internationale.pdf>  
<http://sdil.ac.ir/index.aspx?pid=99&articleid=62893>  
NATIONAL SYMPOSIUM-  
<http://www.nationalsymposium.com/communism.php>  
SCIENCE DZ-<http://www.sciencedz.net/conference/6443-fifth-international-conference-after-communism-east-and-west-under-scrutiny>  
ARCHIVE COM-<http://archive-com.com/com/c/conferencealerts.com/2014-12->

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01\_5014609\_70/Rome\_15th\_International\_Academic\_Conference\_The\_IISES/  
CONFERENCE WORLD-<http://conferencesworld.com/higher-education/>  
KNOW A CONFERENCE KNOW A CONFERENCE-  
<http://knowaconference.com/social-work/>  
International Journal on New Trends in Education and Their Implications  
(IJONTE) Turkey <http://www.ijonte.org/?pnum=15&>  
Journal of Research in Education and Teaching Turkey-  
<http://www.jret.org/?pnum=13&pt=Kongre+ve+Sempozyum>  
CEPOS CONFERENCE 2015 is part of a "consolidated list of all international and  
Canadian conferences taking place pertaining to international relations, politics,  
trade, energy and sustainable development". For more details see  
<http://natocouncil.ca/events/international-conferences/>

### CEPOS Conference 2014

The Fourth International Conference After Communism. East and West under Scrutiny,  
Craiova, 4-5 April 2014 was very well received by the national media and successfully  
indexed in more than 9 international databases, catalogues and NGO's databases such as:

American Political Science Association, USA-  
<http://www.apsanet.org/conferences.cfm>;  
Journal of Church and State, Oxford-  
<http://jcs.oxfordjournals.org/content/early/2014/01/23/jcs.cst141.full.pdf+html>;  
NATO Council of Canada (section events/ international conferences), Canada,  
<http://atlantic-council.ca/events/international-conferences/>  
International Society of Political Psychology, Columbus, USA-  
[http://www.ispp.org/uploads/attachments/April\\_2014.pdf](http://www.ispp.org/uploads/attachments/April_2014.pdf)  
Academic Biographical Sketch,  
<http://academicprofile.org/SeminarConference.aspx>;  
Conference alerts, <http://www.conferencealerts.com/show-event?id=121380>;  
Gesis Sowiport, Koln, Germany, <http://sowiport.gesis.org/>; Osteuropa-Netzwerk,  
Universität Kassel, Germany, [http://its-vm508.its.uni-kassel.de/mediawiki/index.php/After\\_communism:\\_East\\_and\\_West\\_under\\_scrutiny:\\_Fourth\\_International\\_Conference](http://its-vm508.its.uni-kassel.de/mediawiki/index.php/After_communism:_East_and_West_under_scrutiny:_Fourth_International_Conference)  
Ilustre Colegio Nacional de Doctores y Licenciados en Ciencias Politicas y  
Sociologia, futuro Consejo Nacional de Colegios Profesionales, Madrid,  
<http://colpolsocmadrid.org/agenda/>.



## **RSP MANUSCRIPT SUBMISSION**

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*REVISTA DE ȘTIINȚE POLITICE. REVUE DES SCIENCES POLITIQUES (RSP)*

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Page setup: B5 JIS

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Author(s): For the Name and Surname of the author(s) use Times New Roman 14 Bold, Center. About the author(s): After each name insert a footnote (preceded by the symbol \*) containing the author's professional title, didactic position, institutional affiliation, contact information, and email address.

E.g.: Anca Parmena Olimid\*, Cătălina Maria Georgescu\*\*, Cosmin Lucian Gherghe\*\*\*

\* Associate Professor, PhD, University of Craiova, Faculty of Law and Social Sciences, Political Sciences specialization, Phone: 00407\*\*\*\*\*, Email: [parmena2002@yahoo.com](mailto:parmena2002@yahoo.com). (Use Times New Roman 9, Justified)

\*\* Lecturer, PhD, University of Craiova, Faculty of Law and Social Sciences, Political Sciences specialization, Phone: 00407\*\*\*\*\*, Email: [cata.georgescu@yahoo.com](mailto:cata.georgescu@yahoo.com). (Use Times New Roman 9, Justified)

\*\*\* Lecturer, PhD, University of Craiova, Faculty of Law and Social Sciences, Political Sciences specialization, Phone: 00407\*\*\*\*\*, Email: [avcosmingherghe@yahoo.com](mailto:avcosmingherghe@yahoo.com). (Use Times New Roman 9, Justified)

Author(s) are fully responsible for the copyright, authenticity and contents of their papers. Author(s) assume full responsibility that their paper is not under review for any refereed journal or conference proceedings.

#### **Abstract**

The abstract must provide the aims, objectives, methodology, results and main conclusions of the paper (please submit the papers by providing all these information in the abstract). It must be submitted in English and the length must not exceed 300 words. Use Times New Roman 10,5, Justify.

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### Keywords

Submit 5-6 keywords representative to the thematic approached in the paper. Use Times New Roman 10,5, Italic. After the keywords introduce three blank lines, before passing to the Article text.

Text Font: Times New Roman: 10,5

Reference citations within the text Please cite within the text. Use authors' last names, with the year of publication.

E.g.: (Olimid, 2009: 14; Olimid and Georgescu, 2012: 14-15; Olimid, Georgescu and Gherghe, 2013: 20-23).

On first citation of references with more than three authors, give all names in full. On the next citation of references with more than three authors give the name of the first author followed by "et al."

To cite one Article by the same author(s) in the same year use the letters a, b, c, etc., after the year. E.g.: (Olimid, 2009a:14) (Olimid, 2009b: 25-26).

### References:

The references cited in the Article are listed at the end of the paper in alphabetical order of authors' names.

References of the same author are listed chronologically.

### For books

Olimid, A. P., (2009a). *Viața politică și spirituală în România modernă. Un model românesc al relațiilor dintre Stat și Biserică*, Craiova: Aius Publishing.

Olimid, A. P., (2009b). *Politica românească după 1989*, Craiova: Aius Publishing.

### For chapters in edited books

Goodin, R. E. (2011). The State of the Discipline, the Discipline of the State. In Goodin, R. E. (editor), *The Oxford Handbook of Political Science*, Oxford: Oxford University Press, pp. 19-39.

### For journal Articles

Georgescu, C. M. (2013a). Qualitative Analysis on the Institutionalisation of the Ethics and Integrity Standard within the Romanian Public Administration. *Revista de Științe Politice. Revue des Sciences Politiques*, 37, 320-326.

Georgescu, C. M. (2013b). Patterns of Local Self-Government and Governance: A Comparative Analysis Regarding the Democratic Organization of Thirteen Central and Eastern European Administrations (I). *Revista de Științe Politice. Revue des Științe Politice*, 39, 49-58.



## RSP MANUSCRIPT SUBMISSION

### Tables and Figures

Tables and figures are introduced in the text. The title appears above each table.

E.g.: Table 1. The results of the parliamentary elections (May 2014)

Proposed papers: Text of the Article should be between 4500-5000 words, single spaced, Font: Times New Roman 10,5, written in English, submitted as a single file that includes all tables and figures in Word2003 or Word2007 for Windows.

All submissions will be double-blind reviewed by at least two reviewers.