Selected aspects of modernization in CEE Region

Editors

Paweł Grata
Jarosław Kinal

Rzeszów University Press

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From Editors

Modernization processes in Central and Eastern Europe played a key role in shaping the region's social, political and cultural structures. Their significance goes far beyond simply imitating Western models, as modernization in this part of the continent was a complex process, often taking place at the intersection of local traditions and international influences.[1]

The aim of this publication is to analyze selected aspects of modernization in the Central and Eastern European region from a historical, media and cultural perspective. The articles in this volume present, on the one hand, the theoretical contexts of modernization and, on the other hand, specific case studies that show how modernization processes have affected local communities, institutions and historical narratives.

The first text, by Carolina Ferarro, is devoted to the analysis of Jean--Jacques Rousseau's thoughts on modernization and its reception in the Polish context. The author points to his reflections on the unique political character of the Polish-Lithuanian Commonwealth and the ways in which

[1] The results of research on modernization processes in the region have also been published in the following publications edited by the editors of the volume: *Selected Aspects of Modernization Processes in "Younger Europe": Past and Present*, Rzeszów 2023; *Procesy modernizacyjne w "Młodszej Europie" from an interdisciplinary perspective*, Rzeszów 2023, and *Selected aspects of modernization in CEE Region*, Rzeszów 2025. These volumes are the result of two events organized by the Department of Economic and Social History of the Institute of History at the University of Rzeszów: The Central European Congress of Economic History in 2023 and the Central European Congress of Modernization in 2024. Both events were funded by the Ministry of Science and Higher Education as part of the Social Responsibility of Science program.

classical models could have provided an alternative to Western modernization paths. Another text, by Radu Romînăşu and Laura Ardelean, discusses the main channels of modernization in the Romanian territories in the 18th and 19th centuries, analyzing how Enlightenment ideas and the influence of European powers affected social and political change in the region.

In the context of 19th-century health crises, Laura Ardelean and Cristian Apati examine the state's response to the cholera epidemic in 1873 in the Bihor district. The authors point to changes in the approach to public health and the impact of the modernization of the medical system on the state's response. Zenonas Norkus and Aelita Ambrulevičiūtė, on the other hand, analyze Lithuania's economic development during the Great Depression of the 1930s and compare it with other countries in the region.

In the section on media and culture, Pavel Mücke analyzes the transformation of tourism between Czechoslovakia and Poland from the 1970s to the 1990s, showing how travel patterns and their significance changed in the context of post-socialist transformation. Lenka Kratka, on the other hand, examines the functioning of the command economy in Czechoslovakia, focusing on the specific nature of the art market as an area of non-standard approaches to entrepreneurship.

Other articles deal with the topics of historical memory and national identity. Sorin Șipoş, Cosmin Patca, Mircea Matei and Laura Ardelean analyze the cultivation of memory of Avram Iancu through public monuments in Bihor County, showing how historical narratives influence the contemporary perception of national heroes. Iulia Vaisărhofer describes the publishing activities of the Romanian historian Nicolae Bălcescu, pointing out their significance in shaping national identity.

Also noteworthy is the text by Andrei Di Carlo, who analyzes the relationship between Richard Hofstadter and American-Polish debates on modernization and the disenchantment of the world, and the article by Anna Adamus-Matuszyńska and Piotr Dzik on local particularism in the visual identification of cities and municipalities in Poland.

The last two texts are devoted to contemporary issues: Csilla Mile considers the problem of sustainable development in the context of economic competitiveness, while Kinga Lechwar analyzes the challenges of information security in Central and Eastern Europe in the 21st century. The book ends

with an article by Agata Krzywdzińska on Russia's influence on the media in Kazakhstan.

The presented volume shows a wide spectrum of topics related to modernization in Central and Eastern Europe, emphasizing both historical and contemporary contexts of these processes. We hope that the presented research will enrich the debate on modernization and its significance for the shaping of societies in Central and Eastern Europe.

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Rousseau Counter Modernization and the Reception of the Classics in *Considerations on the Government of Poland*

Abstract

The aim of this article is to shed light on how the Polish-Lithuanian Commonwealth ignited an important debate on modernization on the basis of Jean Jacques Rousseau's (1712–1778) thinking about the modern state and its relationship to the classical world. In *Considérations sur le gouvernement de Pologne* (1782), Rousseau recognizes the uniqueness of the Poles, their need to shape politics with their national character, and argues for a strengthening of the local political system rather than radical change. According to Rousseau, the Polish-Lithuanian Commonwealth is an example of how the socio-economic system can be reformed by using models inspired by the Graeco-Roman tradition. Rousseau's admiration for the Polish-Lithuanian Commonwealth is thus linked to the political wisdom of antiquity, from which we can derive a critique of the process of modernization, understood as characterized by rationalism, individualism, economic and industrial development. During the 18th century, France was at the forefront of a more rational approach to politics, while the Polish-Lithuanian Commonwealth aspired for autonomy. By comparing France and the Polish-Lithuanian Commonwealth, Rousseau becomes a key figure in the relationship between the Eastern and Western blocs and their historical and political development. I will comment on selected parts of Rousseau's *Considérations* in order to describe the main ideas of Rousseau's reformation project and to clarify whether this is a kind of counter-modernization, understood here as a modern reception of ancient sources in the constitution of a modern society.

Keywords*:* Rousseau, Polish-Lithuanian Commonwealth, antiquity, constitutionalism, counter-modernization

Rousseau przeciw modernizacji i recepcja klasyki
w *Rozważaniach o rządzie polskim i jego zamierzonej reformie*

Abstrakt

Celem tego artykułu jest rzucenie światła na to, w jaki sposób Rzeczpospolita Obojga Narodów zapoczątkowała ważną debatę na temat modernizacji w oparciu o rozważania Jana Jakuba Rousseau (1712–1778) o nowoczesnym państwie i jego związku ze światem klasycznym. W *Rozważaniach o rządzie polskim i jego zamierzonej reformie* (1782) Rousseau uznaje wyjątkowość Polaków, ich potrzebę kształtowania polityki zgodnie z ich narodowym charakterem i opowiada się raczej za wzmocnieniem lokalnego/tamtejszego systemu politycznego niż za radykalnymi zmianami. Według Rousseau Rzeczpospolita Obojga Narodów jest przykładem tego, jak można zreformować system społeczno-gospodarczy, korzystając przy tym ze źródeł grecko-rzymskich. Porównując Francję i Rzeczpospolitą Obojga Narodów, Rousseau staje się kluczową postacią w relacjach między blokami wschodnim i zachodnim oraz dla ich historycznego i politycznego rozwoju. Skomentuję wybrane fragmenty *Rozważań*… Rousseau, aby opisać główne idee stojące za jego reformatorskim projektem i wyjaśnić, czy można go uznać za rodzaj kontrmodernizacji rozumianej tutaj jako nowoczesna recepcja starożytnych źródeł w konstytucji nowoczesnego społeczeństwa.

Słowa kluczowe: Rousseau, Rzeczpospolita Obojga Narodów, starożytność, konstytucjonalizm, przeciw modernizacji

Introduction

This article aims to analyze the national political system of the Polish Lithuanian Commonwealth and its members (the Polish noblemen), through the lens of Jean Jacque Rousseau's *Considérations sur le gouvernement de Pologne* (1782). On a historical and sociological basis, it is guided by a vision of modernization that certainly resonates in the Polish political debate of the 18th century. The Polish fascination with Rousseau was probably fuelled by the fact that Rousseau was a point of reference for the growth of democratic institutions and the freedom of citizens in Poland as well. Rousseau's interest in discussing Poland was motivated by the conviction that Poland was a case to which he could better apply his theories and which could thus become a hope for a future Europe. For this reason, Rousseau insisted on how Polish culture and political institutions could be strengthened. In particular, Rousseau called for Poland to preserve its special customs and traditions, to es-

tablish a confederation of 33 small states and to strengthen the power of legislation and thus freedom. He also favored the establishment of a good education system, the promotion of patriotism, the transformation into a hereditary monarchy and the dominance of the general will as universal equality. Rousseau did not join the Polish reformers' enthusiasm for change and instead suggested preserving Poland's traditional values. In fact, in the 18th century, Poland had shown the ability to maintain the old values and thus revolted against modernity. Rousseau's knowledge of Poland was based on what he had learnt from Wielhorski and other indirect sources, which suggested a vision of the country as less realistic and more mythical, more akin to antiquity. Poland's main problem is that it must manage and preserve its independence and autonomy, especially in the face of the threat from Russia. In this article, I will explain Rousseau's view of the Polish-Lithuanian Commonwealth. This is characterized by the following points: redefinition of borders, education for all, negative role of money and trade, awareness of being a community, importance of socialization and space to play from an early age, various local Diets sending delegates to the national Diet that represents the will of the people, and decentralization of power to strengthen bonds between citizens.

Having explained Rousseau's intellectual activity on the basis of his major works, I focused on Rousseau's debate first with Stanisław Leszczyski and then with Michał Wielhorski. In particular, the confrontation with Wielhorski is the starting point for the writing of the *Considérations sur le gouvernement de Pologne*. I have therefore selected and analyzed paradigmatic passages from Rousseau's *Considérations* in order to show how theories about the construction and maintenance of a state can be applied to reality. In the case of the Polish-Lithuanian Commonwealth, the dichotomy between antiquity and modernity – which in Rousseau's view has negative consequences – could find a solution by realizing modern values with ancient Greek and Roman models. In Rousseau's view, truly modern thinking cannot avoid a re-evaluation of antiquity. By applying classical political models – such as those of the philosopher Plato, or of the legislator Lycurgus – Rousseau proposed his ideal constitution, namely the 'social contract'. The democratic aspects of his thought can be seen as an attempt to modernize society, which would otherwise remain stuck in an elitist institutional dynamic. But the reforms of

Rousseau's opponents, as in the case of Stanisław, also proposed effective elements for the modernization of Polish society. Both are attempts at reformation. In the case of Rousseau's *Considérations*, the aim is to demonstrate a political national plan, i.e. the will for independence and autonomy based on the solid connection between the traditions of the Poles and the ancient Greek and Roman models. I will show how Rousseau can be seen as a valuable source for the discussion of modern ideas and reforms in the context of the Polish-Lithuanian Commonwealth. Moreover, I will refer to his political theories and practices as attempts at counter-modernization.

Rousseau's oeuvre

The Swiss-born philosopher, political and educational theorist Jean Jacques Rousseau is considered one of the most creative proponents of the comparison between the Polish-Lithuanian Commonwealth and France during the Enlightenment. Indeed, Rousseau had a far-reaching influence on European political thought.[1] He was a versatile thinker who should be read in his entirety. His works, even if they deal with common themes, differ greatly from one another. For example, the *Nouvelle Héloïse* (1761), a collection of letters from various people dealing with the subject of passion and renunciation in the Middle Ages, certainly has a different style and turning points than the pedagogical novel (or treatise) *Émile* (1762), *Du Contrat Social* (1762),[2] or the preceding *Discours sur l'économie politique* (1755), which is devoted to the subject of political economy. Equally different (although written in the same years) are the *Project de Constitution pour la Corse* (1764–1765), a testimony to Rousseau's desire to put some of the political theses from *Du Contrat Social* into practice, and *Les Confessions* (1764–1766), an autobiographical work. It is therefore not easy to present the work of Rousseau, who for this very reason boasts a number of possible applications of his ideas: in

[1] For a broader overview of Rousseau's political work, I recommend reading the following texts: Masters (2019); Riley (2001).

[2] The English quotations from *Du Contrat Social* are taken from the online source made by Online Library of Liberty Project which based on G.D.H. Cole, trans., *The Social Contract and Discourses by Jean-Jacques Rousseau*, London, Toronto: J.M. Dent and Sons, 1923. http://oll.libertyfund.org/title/638.

literature, education, philosophy, political science, history and music. Nevertheless, his works are explicitly or implicitly about the construction of a social order that allows people to follow "nature" and be free, that allows them to recognize no other slavery than the slavery of natural necessity. So one of the aspects I will focus on the most, and which is also one of the central elements of Rousseau's thought, is the theme of 'freedom' and how to preserve it in order to create a peaceful society.[3]

The theoretical basis and source of Rousseau's enquiry can be traced back to the famous *Discours sur les sciences et les arts* (1750) and *Discours sur l'Origine et les fondements de l'Inégalité parmi les hommes* (1755). Rousseau expressed his idea of freedom by starting from a purely humanist position and taking into account the authority of ancient Greek and Roman sources. Indeed, the first speech, written in 1750 in response to the competition organized by the Academy of Dijon, compares the idealized figures of Plutarch and Socrates with the dichotomy of imperial Rome and contemporary Paris. In order to take part in this competition, Rousseau had to answer the following question: "Has the restoration of the Sciences and the Arts Contributed to the Purification of Morals?." He won by denying this contribution and claiming that the core of degeneration was the slow corruption of the state of nature. In his opinion, civilization brings with it artificial inequalities and the concept of private property creates social inequalities. In the second speech on the subject of inequality, however, Rousseau claims that such a state cannot be caused by the state of nature, but has arisen with the development of society. He tried to tackle the problem of socio-economic conditions, which are very unequal and hinder any attempt at democratic politics. His approach is characterized by a mythical knowledge that forms the basis for a strong criticism of contemporary society: on the one hand, society was created by free men; on the other, it has suffered degeneration through the institutions of civil society.[4] From a theoretical point of view,

[3] In his book, Nicholas Dent attempts to cover Rousseau's entire thought. He therefore presents Rousseau's central ideas and arguments, including the corruption of modern civilization, the state of nature, the general will and education. In doing so, he emphasizes Rousseau's particular attention to the subject of democracy and freedom (Dent, 2008).

[4] It should be borne in mind that the state of nature that appears in the *Discours sur l'inégalité* is a pre-societal state. In fact, there is also the *Manuscrit de Genève*, in

these considerations had an enormous influence on the elaboration of the work *Du Contrat Social* and the idea of the general will (*volonté générale*). Indeed, the idea of the social contract fully integrates the aspect of legitimacy in society, i.e. legitimacy lies with the people and sovereignty is the result of the contract between citizens (Bertram, 2004, pp. 97–122).

The aim of this article is to analyze Rousseau's theoretical framework in order to demonstrate its applicability to concrete political situations. Practical consequences of his theories on the general will, the reconciliation of freedom and authority, language and education can be found in two of his later works: the aforementioned *Projet de constitution pour la Corse* (1764–1765, but not published until 1861) and *Considérations sur le gouvernement de Pologne* (1770–1771, but not published until 1782).[5] In relation to the former treatise, Rousseau argued that the island of Corsica can still harbor an autonomous legislature, as the population is still almost in a state of nature, as described in the *Discours sur l'Origine et les fondements de l'Inégalité parmi les hommes*. The principle of autonomy that Rousseau sought for the Corsican population can also be found in his considerations on Poland. In this treatise, Rousseau presents himself as a legislator who re-evaluates the institutional foundations and civic morality. There, Rousseau leads the reader to empower a critical understanding and the search for utopia and dystopia in the political atmosphere of the idealistic expectations of Polish thinkers.[6] Having laid the foundations, albeit briefly, for an account of Rousseau's activity, I will propose a reading of his *Considérations sur le gouvernement de Pologne*, from which the fundamental elements of his political and social thought emerge in a practical context. Květina emphasized the fact that Rousseau's reflections and conclusions played a key role in shaping the dis-

which Rousseau understands the state of nature as the state in which people find themselves in the absence of a political authority (Viroli, 1988, p. 112).

[5] The English quotations from *Considérations sur le gouvernement de Pologne* are taken from the online source (see: Rousseau, 2014).

[6] As claimed by Featherstone, there are two kinds of utopia: one "rested on an ideal of individual autonomy, and it stresses the need for a countercultural education, private family life, and countermodern institutions" (in *La Nouvelle Héloïse* and *Émile*), while the other is "civic, political and collective" (in *Du Contrat Social*) "where the individual finds unity by merging himself with the civic unit" (Featherstone, 1978, pp. 185–186).

course of Polish radical republicans, who were well acquainted with Rousseau's works (Květina, 2018, p. 425). Moreover, Poland was and is influenced by Rousseau's thinking on education. As underlined by Wnęk, Rousseau's concept of education found its way into the Statutes of the Commission of National Education for the academia and schools in the lands of the Commonwealth (1783), which emphasized the need to develop curricula adapted to children's stage of development, as called for in *Émile* (Wnęk, 2024, p. 221). In Rousseau's view, the prospect of a society's growth and autonomy is therefore not based on militias, bureaucratization or sovereignty, but on education. For Rousseau, then, the task of the state is to preserve the freedoms inherent in natural man through culture. Indeed, "democracy is not possible if people are not educated to freedom" (Swenson, 2011, p. 25). The 'government' is at the service of the general will so that the government lapses every time the people assemble and reclaim all powers to preserve the social contract. Rousseau's principles outlined above influenced the political debate in Poland.

Rousseau's arguments towards Stanisław and Wielhorski

The *Considerations* came up as the answer to an enquiry from the Polish Count Michał Wielhorski (1755–1805), one of the deputies of the Bar Confederation (konfederacja barska). It should be emphasized that the Bar Confederation was an alliance of Polish-Lithuanian nobles founded in 1768 to defend the internal and external independence of the Polish-Lithuanian Commonwealth against Russian political influence and King Stanisław II. The focus is therefore on the question of independence and the defense of the people's freedom, topics that, as already mentioned, were central to Rousseau's political thinking. In this context, Wielhorski asked Rousseau to write down and describe his proposals for necessary reforms to save the Polish political system. This was not the first time Rousseau had interacted with Polish society. As early as 1751, there was a debate between Rousseau and Stanisław Leszczyński (1677–1766), King of Poland and Grand Duke of Lithuania. This debate concerns human nature, the development of science and the discussion between individualism and collectivism (universalism).

Stanisław was particularly active in this debate. He is credited with the book published in 1743 entitled *Głos wolny wolność ubezpieczający*, about necessary to save Poland.[7] This treatise is divided into two parts: one dedicated to those who govern, the other to those who are governed. The purpose of government must therefore be to maintain a balance between these two. Stanisław proposed changing the position of peasants – whose poverty was affecting Polish agriculture – and giving them personal freedom. He called for living conditions in Polish cities to be improved, investing more in trade. He also proposed retaining the Sejm, free elections and the *liberum veto*. In the constitutional debate, the *liberum veto* mechanism is of fundamental importance. This was a real legal instrument used by the members of the Sejm to postpone a discussion on which there was no unanimity. Thanks to the *liberum veto*, the decision was postponed or the Sejm could even be dissolved if only one member of the Sejm voted against it, thus cancelling all laws passed during the session. First used in 1652, its abuse weakened the government and made Poland vulnerable to the influence of foreign powers.[8] In fact, Stanisław wanted a centralised power, supported by a solid division of the administration into different areas such as the army, the treasury, the police and the judiciary. Knowledge of the content of this treatise is the basis for the comparison between Stanisław and Rousseau.[9] Stanisław criticized Rousseau's *Discours sur les sciences et les arts*, promoting a view of permanent progress in human history based on meritocratic intellectual elitism and Science as a tool for human emancipation and better quality of life: "(…) the more a society supports science, the better life is lived in it" (Leszczyński, 2000, p. 637). According to Rousseau it was true exactly the opposite. He thought that "too much knowledge means danger for society" (Kvtina, 2018, p. 427). Rousseau was directly opposed to the idea that human society should improve with arts and sciences. He believed that improvement brings corruption and injustice and saw this in modern European political life.

[7] For a more in-depth study of this work, I recommend: Łukowski (2010).

[8] For a better understanding of the causes and effects of the *liberum veto*, I recommend: Roháč (2008, pp. 209–224).

[9] Jan Květina has recently published two articles on Rousseau and Stanisław (see: Květina, 2021a, pp. 29–54; 2021b, pp. 655–675). The works by Richard Butterwick should also be considered (Butterwick-Pawlikowski, 2016, pp. 33–42).

Hence, he hoped for less knowledge, which would mean less danger. Although common sense perceived the Enlightenment as a positive phenomenon for all, characterized by the benefits of scientific progress and the power and centrality of reason, the advantages of civilization were questionable according to Rousseau. He was accused of being an enemy of the arts and sciences. In his opinion, the arts and sciences were not bad; the problem is that society is unable to control them. Therefore, he pointed out that they are detrimental to a virtuous political order because they increase inequality. However, if a society is already corrupt, they can improve the circumstances of corruption and prevent a complete decline in the common good. With these reflections of Rousseau in mind, the contrast with Stanisław is clear. Whereas, according to Rousseau, what is artificial cannot be virtuous, Stanisław believed that reason was the only way to free human beings and create a better society. Stanisław saw "evil" as part of human nature and thus social influence as not having any power on it: human beings need to help each other by fighting evil with the power of reason, thanks to which they can distinguish duty and virtue from crime. He was harshly criticized by Rousseau for his belief in the equal ability of all people to use their reason properly and that knowledge must be disseminated without limits, that everyone must be able to enjoy the benefits and that this is the key to freedom. Stanisław has less confidence in the results of his subjects' freedom because he argues that they abuse it and thus weaken the state.

The comparison between Rousseau and Count Wielhorski, on the other hand, is quite different.[10] In contrast to Stanisław, the confrontation between Rousseau and Wielhorski was less polemical. Wielhorski was fascinated by the Western environment and French ideas about the modern state. The debate between Wielhorski and Rousseau centered on solving the political problems that plagued Poland. Although Rousseau never had high hopes for reforming corrupt societies, he accepted Wielhorski's proposal because Poland was an exception. On the one hand, Rousseau saw a universal value in the defense of Polish society as it is, while Wielhorski was concerned with political institutions and saw no

[10] Concerning the debate between Rousseau and Michał Wielhorski, see: Michalski (2015).

reason against the transformation of Polish society in the direction of other European countries. His debate with Rousseau was a mutual exchange of opinions and co-operation in which they approached a general presentation of different forms of government and ideas of freedom. Wielhorski assessed the *liberum veto* negatively and emphasized the problem of the lack of procedural regulation for the Sejm, which Rousseau attempted to solve. In contrast to Rousseau, Wielhorski sought equality only among members of the nobility. Wielhorski was one of the progressive Polish politicians who sought to modernize and westernize Poland, which is why they regarded Rousseau as a lodestar. They proposed the abolition of the principle of unanimity, the strengthening of the executive by transforming it from an elective to a hereditary monarchy, the reduction of the community responsible for politics by excluding the landless nobility and the prohibition of so-called confederations. As Skrzypek has noted, Wielhorski's Sarmatism found expression in his apologia for the once powerful Polish-Lithuanian Commonwealth before it was devastated by the corrupting influence of European civilization (Skrzypek, 2018, pp. 217–252). Rousseau saw great democratic potential in the Polish Republic. In his reflections, he took into account Wielhorski's description of the current situation in Poland and combined it with his view of the social contract. In thinking about Poland, Rousseau sought the diversity and spontaneity of Poland's unique history and culture. Květina explains in a few words the core of the differences between Rousseau and his Polish interlocutors: "(…) where Leszczynski and Wielhorski perceived Eastern Europe as a space for urgent reforms coming from the West, Rousseau considered it as a true bulwark of liberty and hope for the future society" (Kvetina, 2018, p. 431). Indeed, Rousseau emphasizes the necessary conditions for political dynamism, rather than adopting revolutionary or reformist practices from other countries which may not work well locally. According to him, the power of the State has its origin in people. In my opinion, his contribution to Polish politics is above all an analysis of the culture and peculiarities of Polishness. Rousseau's *Considérations sur le gouvernement de Pologne* deal precisely with this peculiarity of Poland and are the result of the debate between Wielhorski and Rousseau.

Rousseau's general will in *Considérations sur le gouvernement de Pologne*

The Polish political system stood out in 18th century Europe. The dichotomous debate, which summarized both a westernization of the East and a pure and unadulterated reality from the other, divided Poland into supporters of the Western Enlightenment on the one hand and traditional Sarmatism on the other hand.[11] In this specific debate, supporters of the Western Enlightenment wanted the Polish Republic to be included in the progress of Europe, while supporters of Sarmatism wanted Poland to remain aloof and concentrate on its own uniqueness and development. Sarmatism extolled the virtues of the *szlachta* (Polish nobility) and contrasted them with Western values.[12] Michalski analysed Rousseau's *Considerations* and found that Rousseau's political doctrine and Polish-Lithuanian republicanism were compatible (see Michalski 1977). This was due to the fact that both were based on classical republicanism. In his *Considerations*, Rousseau tried to adapt the principles of *Du Contrat Social* to the Polish context. In *Du Contrat Social*, Rousseau advocated a concept of society and citizenship, seeing a nation as linked to natural principles. Following this idea, he asserted in his *Considerations*: "Worthy Poles, beware! Beware lest, in your eagerness to improve, you may worsen your condition. In thinking of what you wish to gain, do not forget what you may lose. Correct, if possible, the abuses of your constitution; but do not despise that constitution which has made you what you are" (Rousseau, 2014, p. 2). Rousseau thus warns the Poles of the danger of straying too far from their natural state and thereby worsening society. In this sense, the natural state is what defines the Poles. We must therefore be careful not to despise our own nature and even defend it against attempts to corrupt it. Their uniqueness, as the first source of virtue, is seen as essential to the maintenance of their society, as they founded both politics and ethics on it. In Chapter III of the *Considerations*, Rousseau focuses on the applica-

[11] As Jedlicki explains well, the problem of civilization emerged in Poland in the middle of the 18th century and soon became one of the main topics of political and cultural debate among Polish Enlightenment thinkers (see: Jedlicki, 2002, p. 14).

[12] Regarding Sarmatism, I recommend: Żukowska (2004, pp. 71–79); Lichański (2020, pp. 45–65).

tion of this idea to Poland, underlining the so-called Polish virtues: "The virtue of her citizens, their patriotic zeal, the particular way in which national institutions may be able to form their souls, this is the only rampart which will always stand ready to defend her, and which no army will ever be able to breach" (Rousseau, 2014, p. 5). Rousseau returns to the model of the ancient legislators, who focused on involving citizens in patriotic practices and virtuous behaviors in order to keep society active and vibrant. Legislation influences the population through habits, customs and morals. If the nation is not united and consolidated, no sense of patriotism can arise among the citizens. Politics must then intervene to establish a feeling of love for the country and help Poland to maintain its existence despite the attempts at oppression by neighboring nations.

To awaken this feeling naturally in the hearts of the citizens, the state must glorify all patriotic virtues with public honors and rewards and use games, festivals and celebrations as instruments to bring the public together. As Rousseau explains: "People in Poland must be entertained even more than in other countries, but not in the same manner. In a word, the execrable proverb must be reversed, and every Pole made to say from the bottom of his heart: Ubi patria, ibi bene" (Rousseau, 2014, p. 7). Good legislation thus makes Poles receptive to patriotism. Focusing on the right customs and, above all, a good education promote integration into society from the heart.[13] This is explained in Chapter IV of the *Considérations*, in which Rousseau argues that Poles should be educated on an equal footing and preferably free of charge. Rousseau argues in favor of a public school system that educates patriots. A patriotic education that is accessible to all will produce a new, freer and happier nation. Rousseau's treatment of education in the *Considérations* has some educational principles in common with *Émile*. Ac-

[13] The education proposed by the legislation of a community could be linked to the idea of disciplinary power that appears in the works of Michel Foucault. The disciplinary system described by Foucault represents a decentralized power based on a dense network of relationships between individuals. In a disciplined society, attempts are made to standardize people's behavior. To achieve this, a series of rewards and punishments are introduced. Those who adhere to the norm are rewarded, while those who deviate from it are punished. The punishment is not violent or physical, but an internalization of the social mechanism (Foucault, 1977).

cording to Mintz, Rousseau's ideas on education in the *Considérations* do not emphasise the student-centered principles of *Émile*, but rather a collectivist education towards patriotism (Mintz, 2023, pp. 45–61). Indeed, Rousseau emphasizes the importance of patriotism for strengthening the autonomy and independence of a country. As noted by Lis: "The theory of the general will display its elasticity in the *Considérations*, along with its far from democratic character. (…) they expounded, more extensively than in that or any other of his works, a mechanism for forming youths and adults into a spiritually uniform society under the slogans of virtue and patriotism" (Lis, 2017, p. 142). The idea that a new republic should be established in the hearts of the Poles is in fact linked to the famous concept of the general will, which was elaborated in *Du Contrat Social*. Although Rousseau mentioned the general will only once in the *Considérations*, this idea has a central position. In Chapter VII, regarding *Means of Maintaining the Constitution*, Rousseau claimed: "(…) the law, which is only the expression of the general will, is properly a resultant of all the particular interests combined and balanced in proportion to their number" (Rousseau, 2014, p. 20). Rousseau thus criticizes corporate interests that disturb the balance of collective judgment. He argues that the right to vote belongs to the individual and not to a corporate body such as the Senate. The general will is thus the source of the legitimacy of the norm. The individual, in association with other individuals, plays a role that is necessary for the construction of a state. Under the supreme guidance of the general will, all express a common recognition of power and interests. This is an expression of the "common good" in which everyone can realize themselves. By obeying the general will and the laws created according to it, citizens preserve their natural and original freedom, because they do not obey any external authority. Rousseau wanted to reform the state on the basis of the concept "that Sovereignty, being nothing less than the exercise of the general will" (Cole, 1923, p. 50).

With regard to the role of the king in Poland, Rousseau wrote that it is good that the king presides over the community as a whole and retains his power for the purpose of supervision. However, this power must be limited by the Chamber of Deputies, which is responsible for legislation, and the Senate, which deals with administration, because "the executive power, being divided between several individuals, lacks inner harmony, and gives rise

to a perpetual wrangling which is incompatible with good order" (Rousseau, 2014, p. 15). However, since the general will does not correspond to the sum of the individual wills, it ultimately appears as an entity that cannot completely solve the problem of freedom. For this reason, Rousseau demanded that the executive (the Senate) must be "capable of holding to the line of duty those magnates who are tempted to depart from it" (Rousseau, 2014, p. 15). As Szkudlarek (2017, p. 55) explains, the contradiction between the affirmation of human nature and the need to create a social order leads, firstly, to a multiplication of the meanings of the concept of nature, so that the original meaning of nature as that which is innate is diluted, making it possible to seek nature in social constructions as well. In *Du Contrat Social*, Rousseau claimed that any hierarchical system was unacceptable and illegitimate because it did not correspond to the general will. By urging the Poles not to change their political system hastily and fundamentally, he is in a sense holding on to the oppressive political system based on aristocracy and serfdom and completely disregarding the idea of the supremacy of the general will.[14] The contradiction is only apparent, for he regards the national character as something that has a long tradition and that has arisen through the political agreement of its members. Since Rousseau understands the nation as a natural concept, he can therefore support stable political structures. The participation of active citizens in shaping the state and thus the laws can be characterized as highly democratic. As Annelien de Dijn (2018, p. 69) noted, Rousseau was one of the first thinkers to explain why the rule of the majority of the people serves the public interest rather than the rule of a philosopher-king or an expert elite. The aim of *Du Contrat Social* was to guarantee the constitution of a democratic state based on the protection of individual freedom. This is the moment when the individual consciously and freely builds a society through a pact of union without subjection, because the individual is a member of a political body that guarantees the rights of the individual. Since sovereignty is not divisible and is separate from the government that

[14] Rousseau influenced the revolution in the USA and its main actors, especially Thomas Jefferson. Indeed, this argument can be found in Jefferson although without the reference to the general will: according to Jefferson, citizens should govern themselves (see: Fumurescu, Li, 2023, pp. 706–724).

implements the laws and defends freedom, the sense of community is strengthened – associative rule resolves the conditions of inequality that have arisen among people. From this reasoning, we can say that the idea of the general will creates a moral and collective body that constitutes a *res publica* from which the whole of society can benefit. He pointed out that small, self-sufficient rural states with perfect natural power can repel any invasion. Rousseau applied the ancient idea of republicanism to the large aristocratic-monarchical state of Poland. The Poles should orientate themselves on the model created by Sparta.

The loss of ancient values and the myth of antiquity

Having elaborated the specifics of Rousseau's thinking on the Polish-Lithuanian Commonwealth and found the tools necessary to understand his political ideas, I propose a vision of counter-modernization based on the application of ancient models to strengthen nationalism. Although this aspect has already been addressed in the previous sections, a discussion of the ancient models in Rousseau's thinking about Poland is necessary. As I have already mentioned, antiquity is the starting point for Rousseau's reflections. Leduc-Fayette explains the relationship between Rousseau and antiquity: "L'antiquitè, imaginée mais non imaginaire, nous appelle; paradoxalement, marcher vers elle, ce n'est pas règresser. Et qui nierat la force de prèsence de l'antiquitè mytique de Jean-Jacques: Socrate, Caton, Lycurgue (…) Voilà nos guides at nos modèles!" (Leduc-Fayette, 1974, p. 161). Rousseau criticised modern societies because they strive for power and profit, characterized by a permanent violence that has its roots in the lifestyle and economy of modernity. The main reason seems to be the loss of ancient values. His opinion becomes very clear in *Discours sur les sciences et les arts*: culture and knowledge have not helped to create a better society, but have sometimes even favored the decay of morals. Depravity and social corruption of morals go hand in hand with scientific progress. For this reason, Rousseau supported a polity closer to that of the Greeks, namely the natural unity of the individual and the community, which should be the goal of modern nations. The political philosophers of antiquity did not see politics as a separate entity from the community, but as a cause that guides citizens towards virtuous behavior.

If we consider the context of Athenian democracy, the concept of citizenship is implicitly linked to active participation. Hesiod in *Works and Days* emphasized how it is necessary to use it in order to avoid the abuse of power (see: *Hesiod: Theogony*..., 2006). Also the laws written by Lycurgus meet this requirement. Nevertheless, we must reach the age of Pericles to witness the birth of a political regime based on a large popular participation. The Athenian democracy implemented by Pericles was a compromise between personal power and demagoguery, the basis of the regime. Given Rousseau's admiration for the ancient city-states, it is understandable that he was astonished that a large and not well-organized state like Poland was still politically prosperous and tried to avoid the dissolution of the state. Disbelief goes hand in hand with admiration and a willingness to propose changes that could preserve Poland's special characteristics.

According to Rousseau, the virtuous Sparta is the model of a homogeneous society. The modest extent of the territory, the mistrust of foreigners, if not outright xenophobia, the lack of wealth, luxury and trade led Rousseau to appreciate Sparta. Moreover, Sparta had economic equality, public education and public games that strengthened the spirit of its citizens. The main example is that of Lycurgus, because "He kept the fatherland constantly before their eyes in their laws, in their games, in their homes, in their loves, in their festivals; he never left them an instant for solitary relaxation. And out of this perpetual constraint, ennobled by its purpose, was born that ardent love of country which was always the strongest, or rather the sole, passion of the Spartans" (Rousseau, 2014, p. 3). Spartans exalted discipline and self-sacrifice, neglecting all forms of erudition like philosophy and art. Plato's praise of Sparta was important. In *The Republic* he projected an Utopian society that seems to follow the Spartan model. Using the figure of Socrates, Plato describes a society in which the laws are upheld by means of a rigid division into a predetermined social system based on meritocracy and by means of an ironclad military education for the youth. Plato believed that in this way the state would attain happiness and a valuable form of constitution. He has contributed the most to the idealization of the collectivity that today is defined in the Myth of Sparta, nourishing the conviction that Sparta was the natural place of virtue. Also in *The Laws*, he supported the figure of the politician with a corpus of laws that are both normative and educational (see:

Pangle, 1988). Aristotle will later argue in *Politics* that this is the only reality that allows man to reach happiness.[15] Although he was not an admirer of the Sparta of his time, he appreciated the original character of its *politeia* and emphasized the stability and permanence of political institutions in Sparta (Aristotle, 1269a). Even Thucydides never hides his admiration for the balance and immutability of the Spartan governing bodies (see: Cartledge, Debnar, 2006, pp. 559–587). Sparta remained a society whose laws were to be admired because they allowed neither despotism nor mob admiration. Moreover, Xenophon, in the *Constitution of the Lacedaemonians*, described the political and military education system of Lacedaemonians in an exalted way. Also Plutarch, Greek of origin but Roman by adoption, wrote in the first century BCE about the virtues of Sparta as a collection of data, anecdotes and stories. They are, of course, controversial because Plutarch lived centuries after Sparta and many of the ancient customs he reports had been long abandoned. Nevertheless, this work is one of the richest sources for historians of Spartan history.

Rousseau's constitutionalism is based both on Greek political categories and on Roman law, which in turn is based on republicanism (which he calls democracy). The history of the Greeks leads to the idea of democracy; consequently, the history of the *Urbs*, the *cives* and the *populus*, leads to the *res publica*. A certain continuity is unavoidable. Nevertheless, the theories that refer to the Roman *res publica* underestimate the improbability of a complete identification between the individual and society. At that time, the living conditions of citizens admitted to public life were privileged: only a few men could exercise power. They would have had to recognize a right to freedom that had not yet been developed in antiquity. The Roman *res publica* is therefore an important example of political participation, albeit without an understanding of individual rights. Romans such as Brutus and Cato the Elder also saw Sparta as a model of socio-political austerity. Cicero did the same, and although he favoured Athens, he compared the Roman Republic to Sparta, emphasising the government of Sparta as the best guarantee of virtue and immutability: "res publica res populi." Unlike Greece, the Republic goes beyond the city boundaries in the sense that more cities can coexist in a sin-

[15] An account about Plato and Aristotle on education is given by: Turan (2011).

gle State and form a single *populus*. In fact, during the Empire, Rome remained a municipal republic (a *populus* of *populi*). Cicero was the first to speak of society as the outcome of a contract for the realization of the *communio utilitatis* (the sharing of advantage). It is precisely the Ciceronian notion of *communio* that would influence Rousseau, who declares himself a republican and perfectly captures the nexus between citizens and city.[16] Moreover, the civic virtue of citizens is the strength of republicanism. Virtue and patriotism became synonyms for republic and freedom. Here, again, the words of Leduc-Fayette are helpful in explaining Rousseau's relationship to the classical models, this time to republican Rome: "Le miracle de la Rome républicaine, c'est qui en fait, historiquement, pense Rousseau, cette union se trouva rèalisèe, et cela parce que le principe même; le ressort, comme dirait lauteur de l'Esprit des Lois, du gouvernement est ici la vertu" (Leduc-Fayette, 1974, p. 106).

Rousseau was also inspired by the Roman Republic of Gaius Fabrizio, a human icon of patriotism who was greatly admired by King Pyrrhus himself. He saw the Romans as an example of military discipline. He believed that military education would defeat egoism. That is why he devotes Chapter XII of *Considerations* to describing the fact that Poland is different not only in its social structure, but also in its military system. Here he introduces the example of the Romans: "In the plan I envisage, and shall soon have finished outlining, all Poland will become warlike in defense of her liberty against the undertakings no less of the prince than of her neighbours" (Rousseau, 2014, p. 39). He wrote something similar in *Du Contrat Social*: "The fondness of the early Romans for country life is well known. They owed this taste to their wise founder, who allowed rural and military labour to go hand in hand with freedom and pushed the arts, trade, intrigue, happiness and slavery into the city, as it were" (Cole, 1923, p. 116). Rousseau's proposals resemble a myth, as they do not attempt to impose a new modern system. Instead, the content of his reforms is not reformative at all. Rousseau suggests that the Poles may only make a few changes to maintain the state of freedom guaranteed by the social contract when absolutely necessary. This means, for example, that even something that is detrimental to the socio-political fabric, such as the *liberum veto*, should be maintained as an instrument of the defence of

[16] On the subject of Cicero in Rousseau's political thought and more generally in the 18th century, I refer to Kapust (2021, p. 268).

liberty against the corrupting activity of the king. The *liberum veto* preserves the character of unanimity, which is absolutely essential and indispensable for the creation of the social contract. Rousseau's politics are therefore static rather than dynamic, which is why he feels deeply interested in and attached to a strict and firm society such as Sparta. Rousseau recognised the uniqueness of Poles, their need for dependence on the politics of the Polish national character and argued in favour of strengthening the local political system rather than radically changing it. The world can only be reformed through a legislative project made by the people for the people. The *Considerations* ends with the hope that a form of government can thus be found as close as possible to his conceptions: "May she triumph over her enemies, become and remain peaceful, happy and free, may she serve as a great example to the universe and, profiting by the patriotic labours of Count Wielhorski, may she find and form in her bosom many citizens who resemble him!" (Rousseau, 2014, p. 54).

Conclusion

When Rousseau applied his ideas to the government of Poland, he focused on the question of how to preserve the authenticity of the Polish spirit and defined the most suitable political system for Poland. He also saw the peculiarities of Poles as a powerful tool that they could use to protect society and its natural tendencies. On the one hand, there is the pursuit of wealth, the development of the arts, the acceptance of European influence; on the other hand, Poland can become a modern Sparta, large but isolated in the centre of Europe. In Rousseau's view, the emphasis on the need for checks and balances is an attempt to solve the problem of the two extremes between political anarchy and absolutism. According to Rousseau, important reforms are obviously linked to Ancient Greece and Rome and, in his opinion, the Poles can be similar to Spartans and Romans. Nevertheless, they should remain as they are in order to create a prosperous future. A reform of the political system and a cultural overhaul will make Poland strong enough to cope with its neighbors and the demands of modernity. For Rousseau, industrial or economic modernization, driven by scientific progress, leads in the long term to corruption and thus to the disintegration of society. A return to antiquity is therefore a way of reconnecting with less corrupt civilizations.

I therefore described Rousseau's reform proposals for the Polish government as counter-modernization, because the rediscovery of the classics serves to ground the state. Essentially, his desire to apply the ancient Greek and Roman models to contemporary conditions should be understood from a nationalist perspective.

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Main Channels of Penetration of Modernizing Ideas in the Romanian Space and Their Impact on the Society (18th Century – Beginning of the 19th Century)

Abstract

This study examines the primary channels through which modernizing ideas entered the Romanian territories during the 18th and early 19th centuries and their transformative impact on society. It highlights the delayed yet profound penetration of modernization into Eastern Europe due to geopolitical constraints, cultural divides, and socio-economic conditions. The research underscores the dichotomy between Eastern and Western influences, emphasizing the role of enlightened clergy, reformist boyars, and intellectual elites as catalysts for change.

The paper explores various modernization pathways, including the influence of the Polish, Phanariot, Russian, and Western European models. It traces the introduction of reforms by Phanariot rulers, such as administrative modernization and the abolition of serfdom, and the role of education, translations, and ideological diffusion in fostering Western values. The analysis also examines the social stratification of Romanian society, the gradual urbanization, and the persistence of traditional structures amidst modernization efforts.

The study identifies the uneven rhythm of modernization across political, cultural, and economic dimensions and highlights the challenges posed by the lack of a strong middle class and the reliance on foreign models. Despite evident progress, the modernization process in Romania is portrayed as incomplete and hybrid, reflecting a blend of old and new elements. Ultimately, the paper provides critical insights into the societal transformations that laid the foundation for Romania's integration into the modern European framework.

Keywords: Phanariot reforms, cultural modernization, political transformation, economic evolution, European influence, educational reform

Główne kanały przenikania idei modernizacyjnych w przestrzeni rumuńskiej i ich wpływ na społeczeństwo (od XVIII do początku XIX wieku)

Abstrakt

Niniejsze opracowanie analizuje główne kanały, którymi idee modernizacyjne docierały na ziemie rumuńskie w XVIII i na początku XIX wieku, oraz ich transformacyjny wpływ na tamtejsze społeczeństwo. Zwrócono uwagę na opóźniony, lecz głęboki proces przenikania modernizacji do Europy Wschodniej, wynikający z uwarunkowań geopolitycznych, podziałów kulturowych oraz sytuacji społeczno-gospodarczej regionu. W badaniach podkreślono dychotomię między wpływami Wschodu i Zachodu, akcentując rolę oświeconego duchowieństwa, reformujących się bojarów oraz elit intelektualnych jako głównych motorów przemian. Artykuł przedstawia różnorodne ścieżki modernizacji, m.in. wpływy modelu polskiego, fanariockiego, rosyjskiego i zachodnioeuropejskiego.

Omówiono reformy wprowadzane przez władców fanariockich, takie jak modernizacja administracji czy zniesienie pańszczyzny, oraz znaczenie edukacji, tłumaczeń i rozpowszechniania idei w promowaniu zachodnich wartości. Analiza obejmuje też przemiany w strukturze społecznej – postępującą urbanizację, a zarazem trwałość tradycyjnych układów mimo wysiłków modernizacyjnych.

Zwrócono uwagę na nierównomierne tempo modernizacji w sferze politycznej, kulturowej i gospodarczej, wskazując na trudności wynikające z braku silnej klasy średniej oraz zależności od zagranicznych wzorców. Mimo zauważalnych postępów proces modernizacji w Rumunii ukazano jako niepełny i hybrydalny – łączący elementy starego i nowego porządku. W podsumowaniu zaprezentowano krytyczne refleksje nad przemianami społecznymi, które stanowiły fundament integracji Rumunii z nowoczesnymi strukturami europejskimi.

Słowa kluczowe: reformy fanaryckie, modernizacja kulturowa, transformacja polityczna, ewolucja gospodarcza, wpływy europejskie, reforma edukacji

Introduction

Universal modern history is characterized by profound changes across all aspects of life. These changes infiltrated Eastern Europe more slowly and later, due to several determining factors, such as: the geopolitical situation marked by the dominance of large empires (Tsarist, Ottoman, Habsburg) in constant rivalry, which generated numerous conflicts and military occupations (an almost uninterrupted series of Russo-Austro-Turkish wars between the late 18th and early 19th centuries), accompanied by significant human and

material losses; the perpetuation of a continuous state of uncertainty and insecurity, which hindered the spread of innovative ideas and delayed progressive changes in the economy and society; substantial economic servitudes; the existence of a divide between the geopolitical region of the Romanian space and that of Europe; as well as a series of economic, religious, and mental factors.

Modernization in the Romanian space signified the society's choice for the values of Western civilization. As early as the 18th century, the political-intellectual environment (enlightened clergy and reform-minded boyars – the main agents of modernization) was highly critical of local realities, advocating for the introduction of European values. In the collective mindset, two poles were established: one negative (the East) and one positive (the West). The language of period documents is using: "civilized West," "enlightened West," etc. The European West also had a concrete manifestation, namely Paris, even though there were multiple models (Ciupală, 2009, pp. 5–19; Documents…, 1891, vol. I, p. 359).

Foreign travelers who arrived in the Principalities at the turn of the 18th and 19th centuries were struck by the profoundly Oriental character of Romanian cities. From their writings, it emerges that they felt they had reached the "gates of the East," "distant Asia," or the "dark East." This sense of being situated in a space beyond civilization is also found among several representatives of Romanian society, especially those who had direct contact with the realities of the West. The most telling example is that of the scholar boyar Dinicu Golescu (1777–1830), who made several trips to the Western world, where he observed the striking gap between Romanian society and Western society.

The publication of his travel notes in the form of a work titled *Însemnări ale călătoriei mele* (Notes of My Travels), released in Buda in 1826, caused a genuine cultural shock in the domestic space, which has since been referred to in Romanian cultural history as the "Golescu syndrome." This marks, in fact, the moment when the process of rapidly closing the gap between Romania and the West was intensified.

The object of criticism and general dissatisfaction was multifaceted, encompassing the socio-economic, political, and cultural spheres. In the initial phase, discontent manifested in the form of numerous memoranda, letters, complaints, and pamphlets (over 80) written by the native boyar class and

addressed to various powers with influence in the Romanian space (the Ottoman Empire, the Habsburg Empire, Russia, and especially France). These documents presented various projects for the reorganization of the Romanian Principalities, advocating for their autonomy, independence, and even the unification of the two Principalities. Naturally, there were direct references to the Phanariot regime, which was perceived as an administration foreign to the national interests of the Romanian lands outside the Carpathians, especially after 1750. Around these writings, a political thinking began to form in Moldova and Wallachia, outlining a political project aimed at reforming these territories towards their integration into the modern world. This marked the crystallization of a true modern political thought, with the ultimate goal being the "transformation of the Principalities." This thinking would continually be fueled by Western modern ideas, leading to the emergence, by the mid-19th century, of the ideology of the 1848 generation, which laid the foundations for modern Romania (Turczynski, 2000, pp. 134–138; Boicu, 1975, pp. 38–49; Boicu, 1986, p. 160; Barnoschi, 1922, pp. 114–312; Corivan, 1931, pp. 12–30; Thouvenel, 1897, p. 96).

Amid all these social, political, and ideological upheavals, a group known generically as the *National Party* began to form. Far from being a modern political party, it represented a social group with a clearly stated objective: the transformation of the Romanian Principalities in a Western, liberal, and democratic direction. This *National Party* emerged in a context of national aspirations and reform, in which native boyars began to support the autonomy of the two Romanian Principalities and their unification. During this period, national unity became a slogan, doctrine, and political trend, and the term *homeland* began to symbolize the unifying force capable of rallying all the energies of society. This marks a genuine crisis of the Old Regime and a firm step towards modernity (Georgescu, 1971; Horga, 2000, pp. 137–138; Fotino, 1939; Cojocariu, 1995).

Paths of modernization

The paths of modernization were numerous, characterized by a slow accumulation across various social spheres. They infiltrated in different ways and from various directions, with the foundation of any cultural progress

being a principle driven by Western influence (Lovinescu, 1997, p. 7). This was a prolonged process, marked by both the reformist initiatives of the ruling powers and those of various representatives of the dominant political categories.

Certainly, we cannot ignore the foundation of indigenous civilization represented by folklore and monastic culture. In practice, over this foundation, modern elements were introduced, which evolved toward the formulation of the modern Romanian state.

One of the first channels – chronologically speaking – through which innovative and modernizing ideas penetrated the Romanian space was the Polish route, which had a direct impact on Moldavia due to the shared border, but eventually reached Wallachia indirectly. In 16th- and 17th-century Poland, important centers of culture and education were active, with the University of Krakow standing out as a key institution where young members of the Moldavian political elite, such as the brothers Miron and Neculai Costin, and later Dimitrie Cantemir, went to study. This prolonged contact would have lasting consequences on the spiritual proximity of the Romanian region to the West (Lemny, 2024, pp. 38–44).

The acceleration of rapprochement with the West, however, took place in the 18th century through the second channel, namely the Phanariot one, which began in 1711 in Moldavia and in 1715 in Wallachia. It took its name from the Phanar district in Constantinople, where the Christian Levantine political elite of the Ottoman Empire was based. Primarily consisting of Greeks, but also people from other ethnic groups, the Phanariots were high-ranking officials within the Empire. Alongside the predominantly Greek individuals, there were also personalities of Albanian origin, such as those from the Ghica family, and others who belonged to mixed families, like the Rosetti family, whose origins lay in Venice.

The historian Nicolae Iorga is credited with being the first to understand the importance of the Phanariot influence on the progress of Romanian society during that era, characterizing Phanariot civilization as a new form of synthesis in Southeastern Europe, one in which the Romanians were also included.

During the Phanariot reigns, the process of introducing innovative reforms began in the Romanian Principalities outside the Carpathians. This

action was facilitated by the personalities of certain Phanariot rulers, who had a solid intellectual background and numerous contacts within Western European circles. The first reforms are associated with the names of the first two Phanariot rulers, Nicolae and Constantin Mavrocordat, who ruled multiple times in both Wallachia and Moldavia (Hașdeu, 1884, p. 109; Platon, 2005, pp. 12–28).

Nicolae Mavrocordat began his first reign in Wallachia in 1716, being a man of vast culture. A bibliophile, with an extensive library at the Văcărești Monastery, and a scholar of contemporary European legislation, he initiated modernization in the country's fiscal sector. His son, Constantin Mavrocordat, who would reign over both Principalities, directed his reformist efforts toward the administrative and social sectors. The modernization of the bureaucratic apparatus took place through the introduction of a salary system and the imposition of judicial reforms, which marked the beginning of the separation of powers in the state. However, his most significant reform was the abolition of serfdom: in 1746 in Wallachia and in 1749 in Moldavia. In this way, the old system of feudal relations was abolished and replaced with a new type of obligations (i.e. the establishment of a new contract with the land-owning boyar), through which the former serf gained personal freedom but without any right to the land he worked (Eliade, 2000, pp. 25–38).

The complex reforms were continued by their successors, Scarlat Calimachi, Alexandru Ipsilanti, and Ioan Caragea, who created legal codes with provisions of Western origin (especially based on the French model), laying the foundations for modern legislation in Romanian society (Constantiniu, 2010, pp. 179–184).

The Phanariot period also marked a time of development for education, particularly through the activity of the two princely academies in Iași and Bucharest. This education was conducted in Greek, which played a crucial role in the political and cultural dynamics of the 18th century, as the first translations of fundamental Enlightenment works, such as those written by Voltaire, Rousseau, and Montesquieu, reached the Romanian lands outside the Carpathians in Greek. In fact, most political thinkers in the Principalities were influenced by Rousseau's principle of the social contract, which forms the foundation of the modern world, and by the relationship between the individual, society, the state, and humanity, also stemming from Enlighten-

ment theory. Throughout the 19th century, the main works of the French Enlightenment were gradually translated into Romanian. Furthermore, through Greek culture, the noble ideas of the French Revolution of 1789 began to penetrate the Romanian Principalities (Iorga, 1928, pp. 204–205; Isar, 2017, pp. 37–45; Eliade, 2000, pp. 126–128).

The Westernization of the Romanian space was also realized through the Russian channel. The presence of Russian generals and officers, educated in Western schools and bearing a type of Western civilization (through their readings, clothing, customs, and mentalities) during the frequent Russian occupations and administrations, had a certain influence on the Romanian elites. A classic example is that of General Pavel Kiseleff, who served as the governor of both Principalities between 1829 and 1834. He was the author of a set of measures aimed at reorganizing the social life of the Principalities in a modern direction. Large-scale urban development projects were initiated, measures were taken to implement a public hygiene system, and the army and finances were modernized. He also sponsored, by the mid-19th century, the constitutional framework known as the Organic Regulations, which became one of the cornerstones of modern Romanian political thought.

Thus, for the Romanian space outside the Carpathians, we identify a model of modernization through refraction or a "graft" type of modernization, meaning an indirect path of Westernization, mediated through Central and Southeastern European cultures.

European ideas also penetrated the Romanian space directly, either through the presence of European emigrants, particularly the French, or through the travels and studies of young members of the Romanian elite in various European centers. Many young boyars studied at prestigious European universities, many of them adopting a liberal way of thinking. The most sought-after centers for education were Vienna, Berlin, Pavia, and Paris. Gheorghe Bibescu studied law at the Sorbonne, as did his brother, Barbu Știrbei, who studied history and political science. They were joined by Ioan Văcărescu, who studied law in Vienna, Gheorghe Asachi, who studied philosophy in Lemberg (Galicia), then continued engineering studies in Vienna and engaged in astronomy and painting in Rome. Upon returning to Moldavia, equipped with an Enlightenment intellectual formation, Asachi played a deci-

sive role in the cultural life of the principality. He became a true founder of cultural institutions. His name is linked to the beginnings of theater in Iași, the founding of educational institutions like the Mihăilean Academy, and to the first Romanian newspaper in Iași, *Albina Românească* (1828) (Cornea, 1972, pp. 382–383).

Another effect was the intensification of book circulation, which experienced a true explosion in the first decades of the 19th century, with a broader openness to French literature, as well as German and English literature. Furthermore, there was the beginning of ideological differentiation between the two Romanian Principalities outside the Carpathians. Moldavia would adopt moderate ideas under the influence of reformist currents from the German and English spheres, while Wallachia would embrace radical, revolutionary ideas from the French ideological horizon. All of these had a significant impact on the transformation of Romanian society in a modern direction. Additionally, it is important to note the emergence and expansion of reading institutions, libraries, and reading rooms (Demeny, Cernovodeanu, 1974, pp. 22–53; Filitti, 1916, p. 32; Cornea, 1972, pp. 387–392).

Political literature, especially after the revolutionary moment of 1821, stirred public spirit and increasingly raised awareness of the need for change. In this context, the two major political tendencies – liberalism and conservatism – began to take shape. Of course, these realities also raised new questions, particularly within the ruling boyar circles: How far should the changes go? Who would be the beneficiaries of the new regime? (Cornea, 1972, p. 390).

The first segment to be affected by modernity was the cultural and ideological one, starting around 1650, with an accelerated pace during the Age of Enlightenment. Following this, the state and its institutions were reformed beginning around 1750, due to the enlightened reforms of the Phanariot rulers and the reformist monarchs of the Habsburg Empire. Finally, the economy and social structures began to transform after 1800 and throughout the 19th century, with the concrete manifestations being capitalism and new social structures based on reason, rights, and duties (Isar, 2014, pp. 17–25).

Despite these transformations, the socio-economic reality during the analyzed period continues to be characteristic of the Old Regime. Four social classes can be distinguished: the nobility, the clergy, the middle class or third

estate (represented by merchants and craftsmen, with the bourgeoisie being numerically insignificant due to the lack of urban tradition and specialized cities), and the peasantry. It should be noted that this social stratification is a pedagogical necessity. In reality, the boundaries between the various social classes were not clearly defined or marked. Consequently, it was relatively easy to move from one class to another. Social classes were easily penetrable. For example, a merchant who became wealthy could purchase a noble rank and, under favorable conditions, advance in the social hierarchy.

The high nobility was the most significant landowner, with the size of the property designating the social rank. During the aforementioned reform of Constantin Mavrocordat, an important change occurred: the granting of the noble title became conditioned by the service received from the ruler, which led to an increase in the dependency of the nobility on the central power.

The cultural openness of the 18th century led to other changes, particularly in customs and fashion. The high nobility was tempted to adopt Western luxury, which they began to perceive as something mandatory for the social rank they held. Additionally, the concept of housing changed, with considerable sums of money starting to be spent on it.

During the period under analysis, there was a gradual increase in agricultural production, although it remained insufficient to meet the broader social needs. Several factors contributed to this stagnation. Firstly, slow demographic growth, driven by inadequate hygiene conditions and a high infant mortality rate, played a significant role. Additionally, the lack of large urban centers, with the exception of Bucharest, Iași, and Craiova, limited the development of markets that could have stimulated production. Economic and fiscal obligations to the Ottoman Empire also had a considerable impact; under the 1755 regulation, the Ottomans established a monopoly on cereal purchases from both Principalities, requiring them to increase the volume to 11,000 tons at prices significantly lower than those in the European market. This Ottoman-imposed monopoly was only lifted with the Treaty of Adrianople in 1829, marking a key milestone in the history of the Romanian economy. Other contributing factors included the low population density and the fact that only one-sixth of the available agricultural land was being cultivated.

From a demographic perspective, while Western Europe experienced a demographic explosion, the demographic growth in the Romanian Princi-

palities was slow, although statistical data still indicates a gradual increase. In Wallachia, the population rose from 1,350,000 inhabitants in 1774 to 1,800,000 inhabitants in 1820. Similarly, Moldavia saw an increase from 322,000 inhabitants to 528,000 inhabitants by 1803.

In general, modernization is closely linked to the degree of urban development. It is within urban spaces that elements of novelty emerge. However, urban development in the Principalities was delayed, mirroring the general situation in Southeastern Europe. In the Principalities, there were cities with a long history, such as Iași, Suceava, Târgoviște, and Bucharest, as well as market towns that appeared at the end of the 17th century and the beginning of the 18th century. Typically, these latter towns originated in rural areas, emerging from villages transformed into small urban centers, often initiated by the ruling authority or landowners. They served as hubs for local trade and, over time, for long-distance commerce. These market towns periodically hosted fairs and markets, and as trade intensified, they gradually became more urbanized.

Despite the nascent nature of urban life, several new elements will emerge in the economy, such as industrial forms, the development of trade centers, and the establishment of public education institutions.

The main wealth of the Principalities remained land, owned by the nobility and the clergy (two-thirds) and by the peasantry (one-third). The most important and, at the same time, the most profitable branch of agriculture was animal husbandry, particularly the raising of draft animals (oxen and horses).

The main food source remained corn, introduced into the Principalities in the 18th century. Wheat and barley were cultivated primarily to meet economic obligations to the Porte and for commercial purposes.

The high nobility continued to be the main beneficiary of the old privileges and the most active segment in terms of the occidentalization of customs and lifestyle from Western Europe. However, throughout the 19th century, a part of it was diluted through the process of the bourgeoisification of the noble class, which led, by the end of the century, to the evolution towards the modern landowner.

The new nobility, arising from the sale of offices and the diversification of the state apparatus, especially during the Phanariot regime, was much more

active, dynamic, and mobile in terms of receiving the signs of modernization at the beginning of the 19th century. Over the course of this century, it gradually became the bearer of liberal ideas.

The clergy was also a landowner, particularly the monastic clergy. In this social segment, the sale of offices was practiced, which led to an increase in the number of priests at the expense of quality. Their social condition was similar to that of the peasants, as they were only exempted from certain taxes.

The peasants continued to adhere to a way of life rooted in long-established traditions. Their dwellings were typically modest, often constructed from earth, consisting of two rooms and a porch. Agricultural labor was carried out with wooden plows, and the poorest among them employed wooden hoes. During this period, they were subjected to significant dispossession of land, transforming into corvée laborers, burdened by excessive taxation. In Wallachia, they were obligated to perform 12 days of corvée labor annually, while in Moldavia the requirement was 24 days. These obligations were further compounded by additional dependencies on the nobility, the clergy, and the state (Isar, 2006, pp. 109–123; Murgescu, 2010, pp. 36–64).

Modernization represented the central axis of Romanian history over a span of approximately 250 years. It was a complex process that can be analyzed across multiple dimensions: social, political, economic, and cultural. Each generation attributed a specific meaning to the phenomenon of modernization, resulting in the development of distinct models intended to be implemented across the three Romanian Principalities. The concept of modernization for the Romanians encompassed at least two dimensions: on the one hand, it referred to civilization, as well as technical and scientific progress; on the other hand, it became synonymous with the ideas of freedom and social, political, national, and religious progress.

The process of modernization encompassed the entire demographic fabric of the nation, with the central objective being the alignment with Western civilization, the integration into the broader European historical trajectory, and the Europeanization of cultural, institutional, and cognitive frameworks. This endeavor was propelled by a heightened awareness of the lag in development and the structural inefficiencies inherent in traditional Romanian society.

The pace of modernization in the Romanian territories was uneven, marked by significant disparities across different sectors, with the temporal framework roughly spanning from the mid-18th century to the end of the 19th century. In certain areas of Romanian society, standards were approached that were closer to modernity, while in others, old and new structures coexisted. As a result, the forms of modernization in the Romanian space were incomplete, hybrid, and often distorted. Nevertheless, what remained crucial was the ideal of modernization that society increasingly recognized. Thus, modernization in the Principalities introduced an intriguing blend of the old and the new.

Furthermore, Romanian society was not homogeneous in terms of its historical age, with significant differences between social groups. The upper echelons of the social pyramid engaged with the age of the century, while the base remained largely unchanged. As a result, the public spirit was characterized by a confusion of norms, ranks, customs, and so on.

Ultimately, what did the first phase of modernization of Romanian society consist of? Does it belong to the major projects of the Romanians of that time? Were they able to assume and successfully implement these projects? Are the modernization regulations adequate to the changes Romanian society needed? Does the absence of a middle class have any connection with the success of the modernization process? These are just a few of the questions we have sought to answer briefly in this study.

Thus, in this mélange, a process of accelerating the stages of delay in relation to the West is triggered, leading to numerous secondary effects of the modernization process, most of which are negative in nature and have yet to be explored in their true dimension.

"Everything ends, and yet nothing has truly begun" seems to be the most fitting phrase to characterize Romanian modernity. It was uttered by C.A. Rosetti in an article published in 1856 in the newspaper *Steaua Dunării*.

Ultimately, what did the first age of Romanian modernization consist of? Does it form part of the major projects of the Romanians? Were they able to embrace it and see it through to completion? Were the modernization regulations adequate for the changes Romanian society needed? Does the absence of a middle class have any bearing on the success or failure of the modernization process? These are just a few of the questions we have sought to answer briefly throughout this study.

The essential difference between the Romanians and the Westerners regarding modernization projects was one of time and, implicitly, the forms that were modified in relation to the "original" ones, which arrived in the Romanian Principalities.

In the West, he existence of a well-established educational system and the presence of a middle class facilitated the absorption of various reforms. In the Romanian space, the state failed to assert its authority in the face of a very powerful aristocracy, in the absence of a well-defined middle class, and where general education remained a secondary concern.

The temptation of the aristocratic model undermined any attempt to consolidate a middle class. Our social stratification appeared to be simple: nobility and peasantry. However, within these categories, there existed a strict hierarchy, where economic, social, and symbolic distinctions created various levels of stratification. The "small nobility" can be considered the nucleus of our middle class. Through its economic and commercial activities, it came close to what was considered "bourgeoisie." Its ideal was always to emulate the model of the great nobility, investing in the purchase of offices and titles, squandering wealth on clothing and houses, on carriages and social appearances. Gradually, a new mode of thinking was developed, where economic reasoning, education, moderation, and investment in the future structured human capital. However, all of this unfolded at an extremely slow, winding, and fragmented pace.

The Romanian Principalities greatly benefited from the surrounding changes and the political events that made history, incorporating these events into their own historical narrative.

It can be easily observed that the entire process of modernization of Romanian society is indebted to various models, predominantly French, many of which were integrated through the Russian channel. France was the quintessential model to emulate, with Russia taking precedence in numerous political interventions that blurred the natural course of events.

As a result, the model of modernization was provided by France, in the form of Westernization or Europeanization. The modernizing agent was Russia, particularly in the political realm; the key modernizing actors were the youth, often educated in Western countries, who returned to the traditional frameworks of Romanian society, playing an essential role in this transformative process.

The model to be emulated remained constant, while the agents of modernization evolved over time, with an increasing number of young individuals eager for reform. Furthermore, it is essential to highlight that a critical factor in the swift adoption of modernizing practices was the substantial influx of foreign nationals into the Principalities.

Any attempt to implement reforms, from the establishment of schools to the construction of storage depots, from the recruitment of the militia to the repair of roads, is followed by a series of abuses. The causes are always the same, never addressed or sanctioned; the administration, inseparable from the judiciary, leaves room for interpretation, fosters corruption, and fabricates false reports to extract revenues. The same issues are constantly raised, yet concrete measures to rectify the situation are rarely found.

Modernization is a term that was rarely used in the period and encountered fierce resistance. However, through newspapers, salons, on the streets, in cafes and neighborhoods, the change that was both necessary and desired was on everyone's lips. But when it came to moving from the reforms outlined on paper to actual implementation, no one was quite as sure that they desired their enforcement. The proposed changes had the potential to shake society to its core, transforming laws, customs, attitudes, and behaviors. The issue was linked to the willingness to take responsibility for introducing them. The city was the first "showcase" for these changes and the place where resources were more accessible. In contrast to the urban areas, the rural world remained in a state, for many decades, perhaps more deplorable than the condition modernization had found it in.

Romanian modernization should have been closely linked to education. The development of education would have been instrumental in taking many necessary steps toward accepting the numerous changes. Unfortunately, this domain was almost always left behind. This resulted in the slow pace of other reforms and exacerbated the differences between the center and the periphery.

Conclusions

As a result, Romanian society in the 19th century was in a perpetual state of beginnings. By examining the documents of the time and correlating them with the actual situation, it becomes evident that what starts with great en-

ergy and appears to be desired by all rarely takes on a defined form. A change in a particular domain begins with much enthusiasm, only to later fade into the realm of institutional indifference, where officials are seldom concerned with the persistence of the measure. Instead, they propose a new beginning, another project, or yet another change, before the previous change has had the chance to show its effects. Society lived in a continuous state of provisionality, characterized by initiations with little to no fulfillment of modernization. Thus, it was about the need to transcend the phase of a promising beginning.

However, beyond these aspects, the changes and progress are still evident: the Romanian society of 1860 is no longer the same as that of 1830, and even less so that of 1800. We cannot judge this process solely as the "half-full" or "half-empty" side of the glass; rather, we can say that it is a painstaking process, marked by many abandonments and reversals, too many beginnings and too few realizations. Laws, institutions, and political forms undergo transformations more slowly because they require longer periods for adjustment, acceptance, promotion, and integration. If we only focus on the urban environment, we might be tempted to believe that Romanian society made significant progress. However, a brief journey to the first village near the city would take us to the other extreme and reinforce our belief that nothing has changed and that nothing "has begun."

The ruling authority, responsible for issuing newspapers, publications, official documents, laws, regulations, and manuals, lacked the requisite educational framework to effectively communicate and explain these measures to the population. Moreover, it was only partially convinced of the efficacy and necessity of the reforms. As a result, the measures "prescribed" by the authorities were often perceived negatively, particularly by the rural population, which strongly resisted them due to a prevailing mental framework rooted in the fear of additional fiscal burdens.

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The State's Attitude in Bihor County Towards Cholera Outbreak of 1873

Abstract

This paper examines the state's response to cholera epidemics in Bihor County during the 19th century, with a particular focus on the outbreak of 1873. By analyzing archival documents, civil status registers, and contemporary newspapers, the study highlights administrative, organizational, and sanitary measures implemented to combat the disease, tracing the evolution of public health policies in the region. The findings reveal a gradual shift from military-enforced quarantines to a more structured epidemiological bureaucracy, emphasizing hygiene, public awareness, and individual responsibility. Despite advancements in healthcare and administration, socioeconomic constraints and inadequate infrastructure hindered the full implementation of isolation measures, contributing to the persistence of the epidemic. This research contributes to the historiography of epidemic management by shedding light on the unique challenges faced by 19th-century Bihor County and the broader Austro-Hungarian Empire in addressing public health crises.

Keywords: epidemic management, public health response, 19th-century healthcare, cholera prevention, socioeconomic impact, archival analysis

Stosunek państwa do epidemii cholery w okręgu Bihor w Rumunii w 1873 roku

Abstrakt

Niniejszy artykuł analizuje działania podejmowane przez państwo w odpowiedzi na epidemie cholery w okręgu Bihor w XIX wieku, ze szczególnym uwzględnieniem wybuchu epidemii w 1873 roku. Na podstawie analizy dokumentów archiwalnych, ksiąg stanu cywilnego oraz ówczesnej prasy badanie ukazuje wdrażane środki admini-

stracyjne, organizacyjne i sanitarne, mające na celu zwalczanie choroby, oraz śledzi rozwój polityki zdrowia publicznego w regionie. Wyniki wskazują na stopniowe przejście od wojskowo egzekwowanych kwarantann do bardziej zorganizowanej biurokracji epidemiologicznej, w której nacisk położono na higienę, edukację społeczną oraz odpowiedzialność jednostki. Pomimo postępów w opiece zdrowotnej i administracji ograniczenia społeczno-ekonomiczne oraz niewystarczająca infrastruktura utrudniały pełne wdrożenie środków izolacyjnych, co przyczyniło się do utrzymywania się epidemii. Artykuł wnosi istotny wkład w historiografię zarządzania epidemiami, rzucając światło na specyficzne wyzwania, z jakimi mierzył się okręg Bihor, oraz szerszy kontekst Cesarstwa Austro-Węgierskiego w obliczu kryzysów zdrowia publicznego.

Słowa kluczowe: zarządzanie epidemią, reakcja zdrowia publicznego, opieka zdrowotna w XIX wieku, zapobieganie cholerze, wpływ społeczno-ekonomiczny, analiza archiwalna

Introduction

Epidemics have had significant repercussions on society, regardless of the historical period in which they occurred. The high mortality rate transformed the common experience into a historical event worthy of note, particularly from a demographic perspective. However, beyond the quantitative dimension, pandemics were responsible for the creation of collective fears in the face of an invisible but omnipresent "enemy," giving rise to deep feelings of insecurity that generated complex attitudes towards death and the passage of life. Additionally, the economy has always suffered, thereby prolonging moments of crisis. Undoubtedly, epidemics contributed to the emergence of social disintegration, most notably within urban environments, as societies lost their cohesion, functionality, and stability.

After countless centuries during which the plague wreaked havoc across Europe, the 19th century was scourged by cholera. During this century, the Bihor County (one of the largest counties in the Kingdom of Hungary, part of the Habsburg Empire and, from 1867, part of the Austro-Hungarian Empire; today, a county located in the north-western part of Romania) experienced six epidemic outbreaks: 1830–1831, 1836 (Ciorba, 2005, pp. 13–20), 1848–1849 (Bolovan, 1994, pp. 164–167), 1855, 1866, and 1872–1873 (Chiș, 2012, p. 5).

In the following pages, we aim to capture the state's attitude towards these successive waves of cholera, to assess the extent of any evolution, and

to examine which aspects of modernity were achieved and where progress was lagging.

From a documentary perspective, compared to the plague, cholera benefits from a more solid classification, which is evident in the documents issued by local or central authorities, civil registers, contemporary newspapers, or handwritten notes. This reality can also be explained by the fact that, at the end of the 18th century and the beginning of the 19th century, bureaucracy gained momentum. Regarding Bihor County, some of these historical sources have already been utilized. It is worth mentioning here the work of Florin Ioan Chiș, *Epidemiile și eradicarea lor în Nord-Vestul României (secolele XVIII–XIX)*, published by Mega Publishing House in Cluj-Napoca in 2012 (Chiș, 2012, p. 102). Using an extensive bibliography and many archival resources, particularly civil registers, as well as documents from the Oradea City Hall and the Bihor County Prefecture, held by the Bihor County Service of the National Archives, the author presents, in varying degrees of detail, each cholera episode that affected Bihor. The last one, characterized by widespread expansion and a large number of victims, started in Galicia in 1872 and then spread through Russian territories into Central Europe during 1872–1873. Among the affected regions was Bihor County, with Oradea (the largest town in the county, the seat of county administration, and an episcopal city) being impacted as early as December 1872. For example, in a telegram addressed to the Ministry of the Interior, local authorities reported the death of a merchant apprentice, who had returned from Pest in December 16, caused by cholera, as confirmed by doctors. However, "only in June 1873, when mass deaths began, can we speak of a full-fledged cholera epidemic," states Florin Ioan Chiș (2012, p. 102). The work devotes significant attention to this major epidemic wave, particularly its demographic aspects, and less to the actions of the county bureaucrats.

A few testimonies regarding the measures taken to combat the disease, referring to the 1830s, were utilized by Ioan Ciorba in the article titled *Holera – o altă formă a răului în Transilvania la începutul secolului al XIX-lea și măsuri de combatere a acesteia*, published in a local journal in 2005 (Ciorba, 2005, pp. 13–20).

Another author who paid close attention to the epidemic of 1872–1873 was Péter I. Zoltán. He retrieved elements from reports published in the

Nagyváradi Napló newspaper, which appeared in the Oradea-based *Várad* magazine (Péter, 2015, pp. 84–93). The Hungarian historian outlines the evolution of the epidemic in Oradea, from the first sporadic cases to the final outbreaks of the disease. Not surprisingly, Oradea, which had the largest population, was the first to report cases in May 1873, and during the summer months, the plague manifested with the greatest intensity. Regarding the date of the onset of cholera, a report dated June 21st from the county official mentions that the first signs of cholera appeared on June 5th in the village of Cetariu, a case imported from Oradea (NARBhCS 47/1873, p. 19). The epidemic continued to affect the city until December. Furthermore, Péter I. Zoltán highlights the role of the local newspaper in informing the population about this disease. By reading the pages of the publication, the population learned about the nature of the disease, its transmission routes, useful information on contamination prevention, as well as steps to follow in the case of infection. All of this was accompanied by daily reports of new cases of illness, statistics on new infections, hospitalizations, and fatalities (Péter, 2015, pp. 84–93). In conclusion, the author recognizes the effort made by *Nagyvárad Napló*, a newspaper that, by supporting the authorities, carried out a true awareness campaign regarding the serious situation and aimed at holding the population accountable, with the goal of stopping or slowing the spread of the disease. The limitations of this material are evident, as it only analyzes information published in a local Oradea newspaper, without referencing other sources. However, it is important to mention this here due to the use of a new documentary source: contemporary newspapers; at least for Bihor County, there are no earlier periodicals that provide information about cholera.

Certainly, while cholera epidemics in Bihor County are documented in various studies and local monographs, research specifically focused on the manifestations of cholera within this region remains relatively scarce.

Acknowledging the fact that 2023 marked the 150th anniversary of the last major cholera epidemic, we have directed our research towards archival collections with potential to fill the historiographical gaps that remain. By examining several files from the Bihor County Prefecture archives, we uncovered hundreds of pages of documents from 1873 that have yet to be explored historiographically (NARBhCS 8/1873; 47/1873; 935/1871–1873).

These documents were highlighted in May 2024 in an article entitled *Unpublished Documents from Bihor Regarding the Last Major Cholera Epidemic (1873)* (Ardelean, Apati, 2024, pp. 108–115). Additionally, we reviewed civil status registers, particularly those related to deaths, with the aim of presenting several parish-level statistical charts. These documents serve as invaluable historical sources that reflect the ongoing struggle of both authorities and the population across Bihor County in dealing with the cholera epidemic. Based on the nature of the content, we identified various types of official documents, such as telegrams, correspondence, reports, and statistics. To illustrate the complex dimensions of the situation in Bihor County and to highlight the official administrative, organizational, and sanitary measures implemented, we present below several testimonies organized by issues. Alongside these detailed accounts from 1873, we will also include, where available, data referring to previous waves of cholera.

Administrative and organizational measures

For this category, we have a number of telegrams and correspondence. For example, a telegram dated July 1873 (NARBhCS 8/1873, p. 1) sent from the center, that is, from Buda, to the Bihor county prefect, specifies that someone is to be sent to the two counties of Bihor and Szabolcs to assess the epidemiological situation. At the same time, it inquires whether the prefect would agree to be responsible for managing the crisis in Bihor, or if he would prefer someone else to take his place.

There was an exchange of telegrams to address these aspects. Thus, the prefect Döry József, in a telegram sent to Count Szapáry Gyula, the Minister of the Interior in Buda, inquires whether being responsible for the cholera epidemic involves continuous travel in the territory (in the county) or just occasional trips (NARBhCS 8/1873, p. 2). The response received was that those responsible for the cholera epidemic would be required to travel continuously, depending on the severity of the situation (NARBhCS 8/1873, p. 3).

A letter from July 18th indicates that the sending of a doctor was ultimately the option agreed upon by the central authorities, considering the more adequate professional training to address the issues related to the epidemic (NARBhCS 8/1873, p. 5).

Earlier, in 1831, we know of the existence of a sanitary commissioner of Bihor County, Emeric Lányi, who appealed to the Greek-Catholic bishop of Oradea, Samuil Vulcan, to help him implement the necessary measures to combat cholera. Also in 1831, the sanitary inspector Schultz Ferentz from Oradea-Olosig is mentioned. Later, in 1866, doctors involved in finding administrative solutions for the benefit of the sick are recorded (Chiș, 2012, pp. 170, 174).

Accounts and reports

Here, we mention two official announcements regarding the end of the epidemic. The one from September 15, 1873, sent by the Bihor County commissioner, Döry József, to Count Szapáry, stated that the epidemic had ended and that only a few cases remained in some of the more populated areas (NARBhCS 8/1873, p. 6v). On another note, those who dealt with the cholera epidemic performed very well, the commissioner stated, and for this reason, he proposed them for rewards and promotions (NARBhCS 8/1873, p. 8).

Following the ministry's request regarding the behavior of state authorities and private individuals in response to the exceptional situation caused by cholera, a report dated October 6, 1873, recommends numerous individuals to be decorated (NARBhCS 8/1873, p. 11).

Similar activity reports are not mentioned for the previous epidemic waves. This does not imply that they did not exist. It is possible that they have not been discovered yet or that they have not been preserved.

Sanitary measures

An extraordinary source of detailed information regarding the measures taken and the strategy for halting the spread of the cholera epidemic in Bihor County is a document issued by the Royal Ministry of the Interior, dated June 24, 1873 (NARBhCS 47/1873, p. 26). In March, a warning was issued to local authorities indicating that the cholera issue was of primary importance, and all efforts should be focused on implementing and maintaining security and prevention measures, ensuring the adequate number of doctors, and that

necessary medicines were available. For this purpose, private doctors could be called upon and sent wherever needed for a daily allowance. Where necessary, the competent authorities were to allocate funds to cover expenses. It was also ordered that the doctors permanently assigned to the county be provided with the necessary medicines, and at the same time, the clothing and linens of the sick be disinfected. Additionally, where necessary, field hospitals were organized to better care for the patients, and where the situation required, gendarmes were also deployed to ensure the enforcement of regulations.

Other measures are outlined in the following lines:

– a suitable number of doctors was allocated;
– public gatherings were prohibited;
– meetings between children were prohibited;
– schools were closed;
– the isolation of the infected individuals was mandated;
– the visitation of the infected individuals was prohibited;
– the maintenance of cleanliness was mandated;
– in the affected localities, it was ordered that epidemic commissions be established to ensure the implementation of the measures taken by the authorities.

As evidenced, the primary factor contributing to the prolonged duration of the epidemic was the failure to implement a strict separation between the infected and the healthy individuals. This challenge arose from the prevailing socio-economic conditions: it was common for entire families to reside in a single room, with no available alternative spaces that could serve as isolation quarters. The relocation of the poorer segments of the population – who constituted the majority – was either unfeasible or hindered by nearly insurmountable logistical difficulties.

Due to the resistance and the erratic nature of the epidemic, the Public Health Council was asked whether it might be necessary to provide doctors with a more formalized procedure and whether, in addition to the previously mentioned rules, the population should be required to adhere to additional measures. Regarding the decisions made by the authorities, the aforementioned Council opined that, due to the contagious nature of the disease, no further measures could be taken other than isolation, where feasible. Specifi-

cally, if the living conditions of a family allowed it, isolation should occur within the family unit; otherwise, external isolation should be enforced, which would necessitate the establishment of temporary hospitals, depending on the need. The creation of such hospitals not only served to isolate the infected, thereby slowing the spread of the disease, but also provided the advantage of ensuring that the sick received medical care in an environment where cleanliness could be maintained, and strict disinfection procedures could be implemented. Furthermore, these temporary facilities would offer better nutrition than was available in many poor households. The poor, aside from their inadequate living conditions, often did not fully grasp the severity of the epidemic. Some failed to recognize the importance of isolation, while others exhibited indifference.

In relation to medication, the Council recommended a specific procedure for attending physicians, taking into account the nature and location of the disease, as well as general experience based on local symptoms:

– if a large number of pustules (blisters) appeared, the recommended treatment was anti-pustular, involving the application of cold compresses or even ice;
– on the other hand, for deeper wounds or the early stages of gangrene, the removal of dead tissue and the prevention of the expansion of necrotic areas was advised. For this, silver nitrate, specifically a silver nitrate solution, was commonly used based on previous experience;
– for local ulcers, the recommended treatment included washing and applying lime water (aqua calcis) and diluted carbonic acid solution, among other remedies.

The history of sanitary measures is impressive. As early as the 1780s, during the Age of Enlightenment, sanitary reform primarily meant delegating health-related issues to local authorities. Areas affected by the plague, and later by cholera, were considered to be under siege, with leadership being taken over by the military. Penalties for non-compliance with quarantine measures were increased, and remuneration for local healthcare personnel also grew. During the reign of Joseph II, even private life was regulated, with specific provisions made for prayers for the sick, funerals, and funeral customs. Measures were also taken to move cemeteries outside urban areas. Physicians experimented with new methods of combating the plague and

cholera, which were disseminated through local Enlightenment networks (Ștefănescu, 2012, p. 10).

In broad terms, the measures implemented against the plague were similarly applied to the cholera epidemics, with the additional provision of free medications for the impoverished population. Emphasis was placed on the importance of preventive instructions based on a clear understanding of symptoms, along with measures aimed at halting transmission, hygiene protocols to be observed, and appropriate care for the afflicted. Central to these efforts was a focus on both public and individual hygiene, recognizing that the fight against cholera was not solely the responsibility of administrative and healthcare authorities, but required active participation from every individual. This highlights the imperative of disseminating anti-epidemic measures on a broad scale (Ștefănescu, 2012, p. 10).

Specifically, in 1830, a sanitary cordon was established, borders were closed, markets were prohibited, and quarantine stations were activated, with medical staff assigned to these points. For instance, in Oradea-Olosig, a quarantine station was set up, initially requiring individuals wishing to enter Oradea to undergo a 10-day quarantine, which was later extended to 21 days (Chiș, 2012, p. 173). Efforts were made to distribute various medications such as calcium chloride, mercury, laudanum, opium, sweet naphtha, gum Arabic, camphorated spirit, and bismuth. The directives, disseminated primarily through priests, emphasized hygiene, both individual and domestic, as a decisive factor in public health, more so than before. Gradually, medical discourse began to replace religious discourse as the dominant framework for understanding and addressing public health issues.

During these years, there was an increasing institutionalization of cholera patients. In 1866, the city's hospital was overwhelmed with cholera cases. As a result, 25 patients were admitted to the garrison hospital. At the same time, additional funds were requested from the central authorities to care for the poor patients in the hospital (Chiș, 2012, p. 174).

As anticipated, the zenith of the measures was reached during the years 1872–1873. Over the course of these two years, a well-established and coordinated healthcare system became evident, supported by a local administration adept at addressing such challenges and mitigating the number of casualties through its intervention. The measures adopted by the authorities

were swift and effective, leveraging the accumulated experience from previous epidemic outbreaks.

Measures adopted by authorities in neighboring areas to prevent the spread of the epidemic

In this regard, a document dated January 12, 1873 (NARBhCS 47/1873, p. 1) reveals that on January 8, the Italian consulate in Pest communicated that on January 4, the Italian government had issued a decree revoking an earlier ordinance concerning extraordinary measures to prevent the spread of cholera, specifically related to products and travelers coming from the Austro-Hungarian Empire. However, there were exceptions regarding textile products, which could only enter Italian territory by land after airing and fumigation. Yet, this measure was suspended due to the impossibility of performing this procedure in the province of Udine.

These types of measures are among the oldest, having also been implemented in the past.

Statistics

In terms of statistics, a substantial volume of data is available, with local authorities entrusted with the responsibility of reporting periodically to the county, which in turn communicated the information to the central ministry. A pertinent example is a comprehensive quarterly report, dated December 23, 1873, prepared by the Prefect of Bihor for submission to the Ministry of the Interior (NARBhCS 47/1873, p. 16). The document paints a rather bleak picture, with little cause for optimism:

1. Regarding the economic situation

As a result of the community's impoverishment, 119 individuals were left to rely on the charity of others. To provide assistance, the county authorities, under the leadership of the vice-comte, organized a delegation for their support. This delegation was allocated a budget of 7,593 forints and 99 kráitzars for this purpose—an amount equivalent to approximately

37,666,240 forints in contemporary terms (*Magyar pénzértékindex*…), or approximately 482,240.87 RON (roughly 96,500 EUR).

The livestock was not affected. From a nutritional standpoint, despite the poor harvest results and ongoing financial difficulties, the situation did not become more dire, primarily due to the good maize production and wheat reserves that ensured food for the population, though only until the next harvest. It was anticipated that, with the arrival of spring, famine would most likely settle in some areas of the county.

Official reports describing a precarious economic situation for previous epidemic waves are not known to us. However, there have been records from clergy members mentioning a severe drought in the years 1831, 1832, and 1833 (Ciorba, 2005, p. 14); it is certain that agricultural production was affected.

2. Regarding the loss of human lives

The epidemic reached its peak during the summer months, resulting in the death of 11,000 individuals. Subsequently, it gradually subsided with the onset of autumn, ultimately disappearing by early November. In terms of cholera-related casualties, the records also accounted for 7,532 widows and orphans. Among these, 5,760 were self-sustaining, 737 relied on support from others, 62 were employed as servants, and 824 were maintained by local communities. In the Beiuș region, there were 30 orphans whose livelihoods were dependent on the incomes of their widowed mothers.

For the 1830–1831 epidemic, the published studies did not utilize statistical reports compiled by the county authorities, which would have covered the entire county or representative parts of the Bihor territory. Instead, they refer to the subjective assessments of prominent figures: "(…) these misfortunes, never before experienced in all parts of the country, were like the Cholera from the East… throughout much of our country, it spread, and many thousands of people were taken by it, and it is approaching us even more strongly," stated Bishop Samuil Vulcan (Ciorba, 2005, p. 14).

Neither for the years 1836, 1848–1849, 1855, nor 1866 are there any recorded official statistics compiled by the local secular authorities or the county administration.

One category of documents, however, helps to compensate for the absence of centralizing reports. These are the civil registers, specifically the death

records maintained by parish priests. For example, all the quantitative data published by historian Florin Ioan Chiș for the years 1830, 1836, 1848–1849, 1855, 1866, and 1873, concerning the Bihor county, are based on these records. In the following, we will present some statistical snapshots derived from this type of documentary source, as well as a brief analysis of these registers.

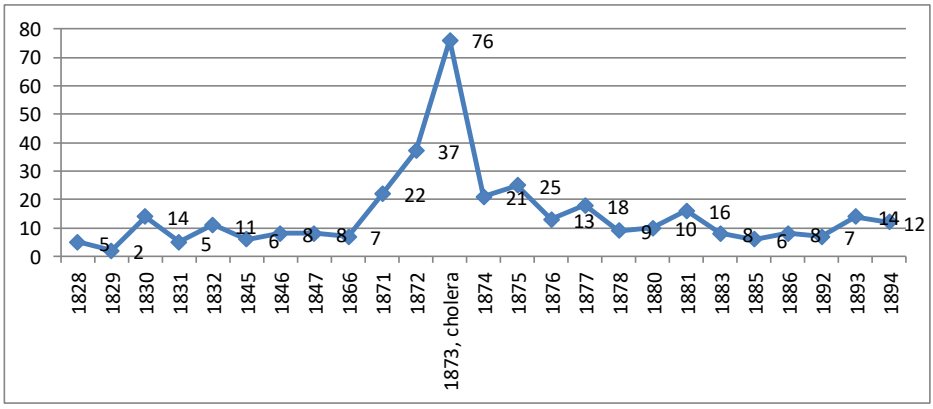
For example, from the summation of the Orthodox deceased in the Ștei parish registry, the following figures emerge.

Table 1. Statistics of Orthodox deaths in the Ștei parish during and after the 19th Century Cholera epidemics

Year	Born			Married			Deceased					
	Total	Boys	Girls	Couples	Average age		Total	Men	Women	Average age	Children under 2 years of age	
											no.	%
1829	6	4	2	1	–	–	2	1	1	–	–	–
1830	7	3	4	2	–	–	14	7	7	–	–	–
1831	9	6	3	2	–	–	5	4	1	–	–	–
1832	6	6	0	2	–	–	11	8	3	–	–	–
1847	9	4	5	2	M	19.5	8	4	4	59.25	–	–
					W	17						
1866	14	8	6	0	M	0	7	5	2	38.42	–	–
					W	0						
1871	9	6	3	0	M	0	22	8	14	27.04	–	–
					W	0						
1872	10	6	4	4	M	27.5	37	19	18	24.3	7	18.91
					W	24						
1873	16	10	6	2	M	29	76	34	42	26.87	14	18.42
					W	24						
1874	8	3	5	0	M	0	21	7	14	21.88	4	19.04
					W	0						

Source: compiled by the authors based on archive documents NARBhCS 570/1828–1895/.

As can be seen, the available data does not encompass all the epidemic years, with the years 1836, 1848–1849, and 1855 being notably absent. In the cases of 1830 and 1873, there is a clear increase in mortality, with the epidemic impacting this parish as well. However, this trend does not hold for 1866. The graphical representation of these data is presented as follows:



Graph 1. The evolution of deaths in the Orthodox parish of Ștei during 1828–1894

Source: compiled by the authors based on documents from NARBhCS 570/1828–1895.

Regarding this unfortunate event, a note in a *Pentecostarium* from Ștei reads: "In the year 1873, in the summer, there was cholera, and all the men died." However, the church records contradict this note, showing a higher number of women deceased – 42, compared to 34 men. The average age of the deceased was 26.87 years. Notably, there was an increase in the number of births during this epidemic year. Another entry, corroborated by Priest Gheorghe Popovici, specifies the duration of the plague: "and the cholera was in 1873 and lasted for 2 months." It is worth mentioning that the town of Ștei is located 85 kilometers from Oradea, near the Bihor Mountains.

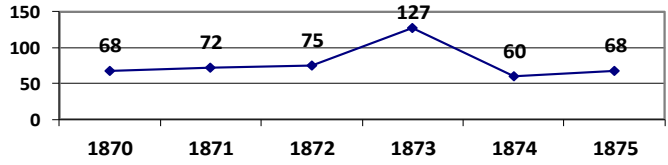
The effects of the 1830–1831 epidemic were also felt in the Orthodox parish of Toboliu, a locality situated 18 km from Oradea, in a plain area.

Table 2. Statistics of Orthodox deceased in Toboliu parish for the years 1828–1833

Year	Born			Marriages	Deceased		
	Boys	Girls	Total		Men	Women	Total
1828	27	16	43	5	6	9	15
1829	15	17	32	12	13	18	31
1830	18	16	34	9	23	22	45
1831	8	16	24	6	29	26	54
1832	14	11	25	13	16	20	36
1833	24	24	48	12	17	6	23

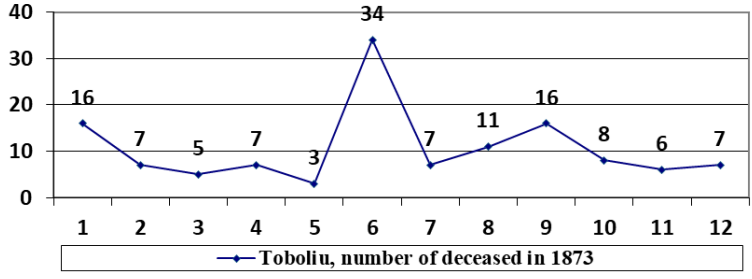
Source: compiled by the authors based on documents from NARBhCS 1323/1828–1845; 1324/1844–1853; 1327/1853-1875; 617/1828–1894.

The 1873 epidemic captured in the following Graphs:



Graph 2. The evolution of deaths in Toboliu during 1870–1875

Source: compiled by the authors based on documents from NARBhCS 1323/1828–1845; 1324/1844–1853; 1327/1853–1875; 617/1828–1894.



Graph 3. The evolution of monthly deaths in Toboliu in 1873

Source: compiled by the authors based on documents from NARBhCS 1323/1828–1845; 1324/1844–1853; 1327/1853–1875; 617/1828–1894.

In the Greek-Catholic parish of Giriș, located 14 km from Oradea, near the parish of Toboliu, the following data was recorded:

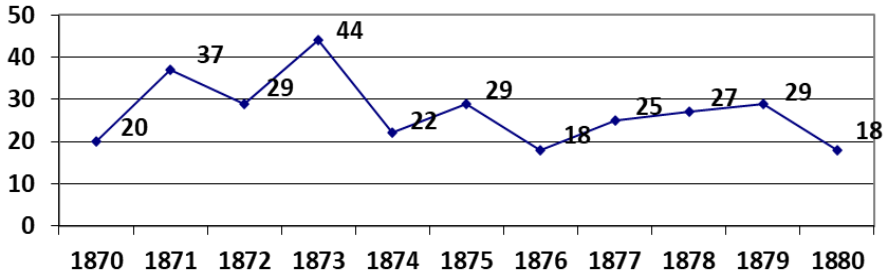
Table 3. Statistical data of deaths in the Greek-Catholic parish of Giriș for the years 1829–1837

Year	Born			Married			Deceased				
	Total	Boys	Girls	Cou-ples	Average age men	Average age women	total > 1 year	Average age total > 1 year	Average age men	Average age women	total < 1 year
1829	21	12	9	7	26.50	20.16	8	26.29	28.25	24.33	1
1830	18	7	11	–	–	–	–	–	–	–	–
1831	29	9	20	15	29.35	23.64	38	36.22	38.26	34.18	7
1832	24	11	13	14	34,53	29.92	14	20.33	27.42	13.25	3
1835	34	22	12	10	33.7	29.2	19	17.97	23.11	12.83	4
1836	36	12	24	8	27.62	22.00	20	36.21	36.42	36.00	8
1837	15	5	10	7	26.71	23.14	26	39.74	42.66	36.82	6

Source: compiled by the authors based on documents from NARBhCS 473/1792–1823, 474/1824–1845, 475/1845–1870, 476/1870–1880, 290/1827–1895.

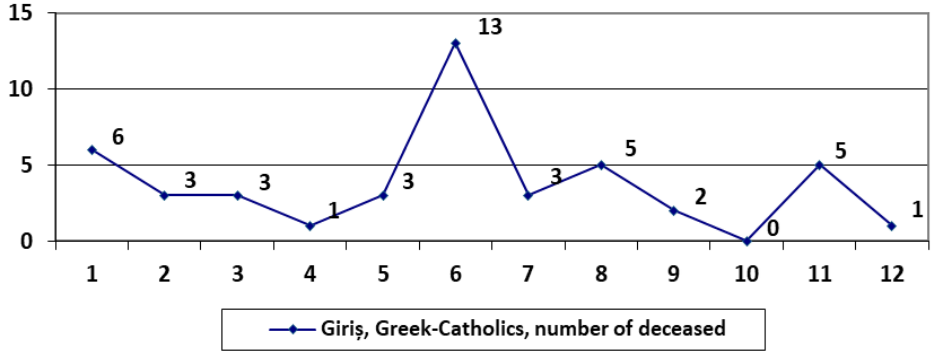
In the death register for the year 1831, it was explicitly noted that six individuals died from cholera. Five of them passed away in October, on the 7th, 8th, 14th, 15th, and 26th, while one died on November 2nd. Two were children under one year old, and the others were 57, 47, 56, and 37 years old.

For the year 1873, the following graphs are presented:



Graph 4. The evolution of deaths in Giriș during the period 1870–1880

Source: compiled by the authors based on documents from NARBhCS 473/1792–1823, 474/1824–1845; 475/1845–1870; 476/1870–1880; 290/1827–1895.



Graph 5. The evolution of monthly deaths in Giriș in 1873

Source: compiled by the authors based on documents from NARBhCS 473/1792–1823, 474/1824–1845; 475/1845–1870; 476/1870–1880; 290/1827–1895.

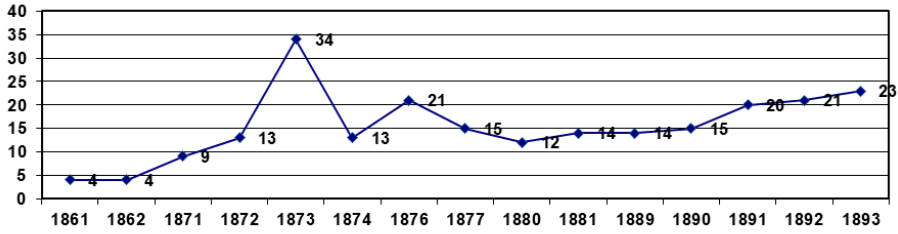
The registers of the Orthodox parish of Subpiatră, located 40 km east of Oradea, on the valley of the Crișul Repede River, allowed us to centralize the following data:

Table 4. Statistics of the deceased from the Orthodox parish of Subpiatră in 1829–1874

Year	Born				Married			Deceased		
	Total	boys	girls	Illegit.	total	Average age men	Average age women	total	Average age	< 1 year
1829	4	3	1	X	2	X	X	3	X	X
1830	7	4	3	X	5	X	X	0	X	X
1842	7	4	3	X	1	29	22	3	60	0
1871	X	X	X	X	X	X	X	9	45.33	0
1872	7	2	5	0	3	25.33	19.66	13	38.38	0
1873	X	X	X	X	X	X	X	34	38.5	0
1874	X	X	X	X	X	X	X	13	30.23	0

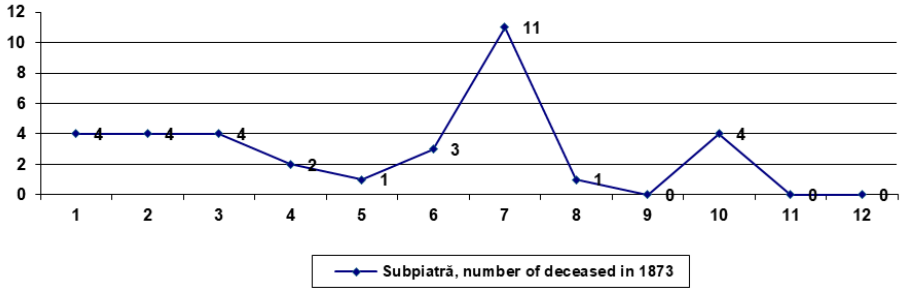
Source: compiled by the authors based on documents from NARBhCS 1161/1852–1876; 539/1828–1895.

The evolution of the number of deceased individuals between 1861–1893 highlights the exponential increase starting from the year 1873:



Graph 6. The evolution of deaths in Subpiatră during the period 1861–1893

Source: compiled by the authors based on documents from NARBhCS 1161/1852–1876; 539/1828–1895.



Graph 7. The evolution of deaths in Subpiatră in 1873

Source: compiled by the authors based on documents from NARBhCS 1161/1852–1876; 539/1828–1895.

Thus, the year 1873 was the year of the great cholera epidemics in Subpiatră. From June 22 to July 24, 11 people died: 4 women and 7 men; their average age was 38.27 years. Like a memorial list, we mention here the names of those who died from cholera:

Table 5. The names of the deceased from Subpiatră during the peak period of 1873

DAY	NAME OF THE DECEASED	AGE
22 Jun.	Ştef Gavril	34
4 Jul.	Ştef Maria	53
5 Jul.	Buce Teodor	26
8 Jul.	Buce Mitru	23
10 Jul.	Piţiş Flore	30
12 Jul.	Păcurar Petru	45
15 Jul.	Piţiş Maria	28
16 Jul.	Lasca Irimie	37
18 Jul.	Ştef Maria	65
22 Jul.	Păcurariu Medre	45
24 Jul.	Lasca Ana	35

Source: compiled by the authors based on documents from NARBhCS 1161/1852–1876; 539/1828–1895.

We shall conclude the examples here. However, it is necessary to offer some remarks regarding the civil status registers that cover this period. In accordance with imperial regulations, parish priests were obligated to maintain records of births, marriages, and deaths. Registers maintained by secular authorities were introduced in this region only toward the end of 1895. Nevertheless, although imperial directives stipulated the data that should be recorded, significant differences can be observed among the parish registers of various religious denominations (in Bihor County, the following confessions coexisted: Orthodox, Greek-Catholic, Roman Catholic, Calvinist, Lutheran, Unitarian, and Jewish). Even within the same religious denomination, the scope of the recorded data evolved over time, generally becoming more detailed. For instance, in the years 1830–1831, Orthodox parishes did not register the age or the cause of death; this was also the case in Roman Catholic and Calvinist parishes. In contrast, Greek-Catholic parishes did record these details. During the year of the major epidemic, 1873, the Orthodox parishes began to document both the age and the cause of death.

Conclusions

In conclusion, we can assert that the measures adopted in the fight against this unknown disease followed, at least initially, the same principles applied in the 18th century during plague epidemics. The innovative element consisted in the attempt to foster individual responsibility, with each person having the possibility to protect themselves by adhering to personal hygiene standards and maintaining a clean-living environment. Information regarding cholera and curative methods reached rural areas, particularly through the mediation of churches and priests, via circulars, calendars, and other printed materials; in urban areas, periodic publications and newspapers also contributed to spreading knowledge. The understanding of the disease's transmission, improvements in treatment efficacy, the methods employed, alongside a higher standard of public hygiene, significantly contributed to the success of the fight against cholera.

The last major epidemic highlighted the existence of a sufficiently well--organized healthcare and administrative system capable of confronting and eradicating the plague. After 40 years of battling cholera, the epidemiological bureaucracy had reached unprecedented levels. We assume that the introduction, during these four decades, of the "cause of death" column in the civil status registers is closely related to the ongoing battle against the epidemic.

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The Economic Growth Performance of Lithuania During the Great Depression in the 1930s in the Regional Cross-Country Comparison[1]

Abstract

This contribution presents new findings of the research on the Gross Domestic Product (GDP) of Baltic countries in the interwar period, which allows for the first time to compare the impact of the Great Depression in the 1930s on the output of Baltic economies (Estonia, Latvia, Lithuania) and neighbor countries with similar historical legacies (being parts of the Russian empire), structures of economy and level of development (Finland and Poland). For the last two countries, data from the Maddison Project Database are used, where GDP data on Poland are available only for 1929–1938. So, according to our data, among the five countries under comparison, real GDP *per capita* contracted most in Poland, decreasing in 1932 to 78.3% of the 1929 level and recovering to this level only in 1938. Latvia was next by recession depth, followed by Estonia and Finland. Surprisingly, there was no real output contraction in Lithuania despite the deflation which was as deep as in Poland. Zooming in on Lithuania's case, we advance several hypotheses (to be tested in further research) to explain this deviant case: 1) there was no economic boom in Lithuania before the GD; 2) Lithuanian economy was most closed (controlling for size); 3) in 1930–1932 Lithuanian economy implemented a mini-industrialization program, conducting anticyclical policies.

Keywords: Great Depression (1929–1933), Gross Domestic Product (GDP), Baltic countries, Finland, Poland, economic growth of interwar Lithuania

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Wyniki wzrostu gospodarczego Litwy w okresie wielkiego kryzysu w latach 30. XX wieku w regionalnym porównaniu międzynarodowym

Abstrakt

W artykule przedstawiono nowe wnioski z badań Produktu Krajowego Brutto (PKB) krajów bałtyckich w okresie międzywojennym, które pozwalają po raz pierwszy porównać wpływ wielkiego kryzysu lat 30. XX wieku na produkcję gospodarek bałtyckich (Estonia, Łotwa, Litwa) i krajów sąsiadujących o podobnej spuściźnie historycznej (byłe części Imperium Rosyjskiego), strukturze gospodarki i poziomie rozwoju (Finlandia i Polska). W przypadku dwóch ostatnich krajów wykorzystano dane z bazy Maddison Project Database (MPD), gdzie dane o PKB Polski dostępne są jedynie za lata 1929–1938. Zatem według naszych danych spośród pięciu porównywanych krajów realny PKB na mieszkańca skurczył się najbardziej w Polsce, obniżając się w 1932 roku do 78,3% poziomu z 1929 roku, a powracając do tego poziomu dopiero w 1938 roku. Następna pod względem głębokości recesji była Łotwa, a za nią Estonia i Finlandia. Co zaskakujące, na Litwie nie doszło do realnego spadku produkcji pomimo tak głębokiej jak w Polsce deflacji. Koncentrując się na przypadku Litwy, stawiamy kilka hipotez (do sprawdzenia w dalszych badaniach), aby wyjaśnić ten odbiegający od normy przypadek: 1) przed wielkim kryzysem na Litwie nie było boomu gospodarczego; 2) gospodarka litewska była najbardziej zamknięta (po uwzględnieniu wielkości gospodarki); 3) w latach 1930–1932 gospodarka litewska realizowała program miniindustrializacji, prowadząc politykę antycykliczną.

Słowa kluczowe: wielki kryzys (1929–1933), Produkt Krajowy Brutto (PKB), kraje bałtyckie, Finlandia, Polska, rozwój gospodarczy międzywojennej Litwy

Introduction

The great global economic crisis of the 1930s (to be referred to as the Great Depression; GD) punctured interwar European and world history. Recently, there was a new surge of interest in the GD not only in economic history but also in the mainstream macroeconomic research focused on the current economic challenges in the advanced Western economies. The reason was the coming of the Great Recession (GR) in 2008–2010, which was broadly perceived by contemporaries as the imminent reenactment of the GD (Grossman, Meissner, 2010; Eichengreen, 2015).

This contribution aims to advance received knowledge of the GD in Lithuania and neighbor countries, drawing on the recent advances in the measurement of the Gross Domestic Product (GDP) in Lithuania. This allows us to

assess the real impact of the crisis on Lithuania's economy for the first time. At the same time, comparison with most similar cases (countries from the same region) leads to new research questions, which are putatively answered in this contribution. Our research question is: how Lithuania's total output was affected by the GD, and how differences in Lithuania's growth performance from that of neighbor countries can be explained? According to our data, there was no real GDP *per capita* (GDPpc) decrease in Lithuania, and this is the puzzle presented and discussed in this contribution.

Our list of comparator countries includes Finland and Poland. Finland is included because, during the interwar period, it was internationally perceived as the fourth Baltic country due to the legacy of long Russian rule (see e.g. Polson Newman, 1930). This legacy was also shared by Poland. However, it also had the legacy of the rule of other great powers (Austria and Prussia), who participated in the partitions of the Polish-Lithuanian Commonwealth (PLC) in the late 18th state. Because of internal heterogeneity deriving from differences in these legacies and due to its much larger size (in terms of territory and population), interwar Poland is more difficult to compare with interwar Lithuania than with other Baltic countries. However, its inclusion can be justified by the legacy of the PLC (shared historical past by Lithuania and Poland) and by pragmatic consideration that this will make our findings and arguments of interest to a broader (Polish) audience.

We start (in the first section of the main part) by describing sources of GDP data for our country cases and present here findings about their interwar time growth. The second section provides more comparative details on the course of the crisis in Lithuania. In the third section, we provide our hypotheses about the causes of Lithuania's growth during the GD to be tested in future research. The conclusion describes its future directions in more detail.

Data and Findings

The most important evidence of economic crisis is the contraction of output (total GDP and GDP *per capita*; GDPpc), indicated by the negative growth rates. The GD 1929–1933 transformed national accounting from a subject for economists with a special interest to a compulsory task for national statistical offices. In this transmutation, the work of Simon Kuznets in

1931–1934 on the U.S. national income assessment for the period 1929–1932 was pathbreaking, culminating in the publishing of the first official U.S. national accounts in 1934 (Studenski, 1958: pp. 149–150, 455–456). One reason was that it was necessary to map the depth of the crisis to conduct Keynesian macroeconomic management. The emergence of macroeconomics as a separate branch of economics was one of the effects of the GD.

Currently, the growth performance of national economies is closely monitored by several national intergovernmental institutions (World Bank, OECD, Eurostat), publishing GDP estimates every quarter. For an interwar period, the standard source is the Maddison Project Database (MPD). However, the first data point for Lithuania in this source is only for 1973, and the same applies to other Baltic countries. For Estonia, Valge (2003) published GDP estimates comparable with those in the first two releases of the Maddison Project Database (MPD, 2010; 2013) for 1923–1938. They are based on the pioneering work of Janusson (1931; 1937) and Horm (1940) on Estonian national income published in interwar times.

A few years later, Roses and Wolf (2010) published GDPpc figures for Estonia and Latvia in 1922, 1929, and 1938 in the authoritative *The Cambridge Economic History of Modern History*. For Estonia, they are different from Valge's (2003) estimates, although Rose and Wolf knew Valge's work. Recently, both were disputed by Norkus and Markevičiūtė (2019), who provided GDPpc estimates for all three Baltic states for 1913, 1922, 1929, and 1938.

Roses and Wolf (2010) and Norkus and Markevičiūtė (2021) used indirect estimation methods. Roses and Wolf did not disclose their method in the detail necessary to replicate their calculations. Norkus and Markevičiūtė used a method pioneered by Allen (1999). In this method, GDPpc values for countries with insufficient data are derived from the GDP data of the benchmark country and data on real wages and agricultural employment, using urban population data as a proxy. Norkus and Markevičiūtė calibrated their model with data on food self-sufficiency and the comparative labor productivity in the Baltic and benchmark countries.

While this could increase the reliability of their estimates, indirect estimates of GDP are of limited usability. Allowing for cross-national comparisons of the levels of living standards, they are not usable for the fine-grained analysis of productivity variation across industries and regions. This aim can be

best served by estimates produced by direct (production, income distribution, consumption) methods.

Direct measurement of Lithuania's GDP came to a real breakthrough with the publication of the estimate of the GDP of Lithuania in 1937 by Klimantas and Zirgulis (2020). They applied production or gross value added (GVA) accounting method. Using the 1937 estimate as a benchmark, in his later work, Klimantas (2024) compiled output volume indexes for eight economy sectors. These indices are then aggregated into a weighted index for GDP, used to derive GDP values in non-benchmark years at the constant benchmark year (1937) prices. They are converted into Gearly Khamis international $ (GK$ 1990), using purchasing power parities (PPP) with Sweden. So Klimantas (2023) was able to produce annual series of Lithuania's GDP for 1919–1940.

Applying an identical methodology, Norkus, Markevičiūtė, Grytten, Šiliņš, and Klimantas (2024) estimated Latvia's GDP in 1935 as a benchmark year and then, together with Klimantas (Klimantas, Norkus, Grytten, Šiliņš, 2024), produced annual GDP series for 1920–1939 (see also: Norkus, Markevičiūtė, Grytten, Krūminš, 2022). They are presented in Table 1 together with Valge's GDP estimates for Estonia in 1923–1938 and estimates for Finland and Poland from MPD (2013).[2] In later releases, the GDP series for Poland was extended backward to 1410, but the gaps for the 1920s were not closed. So, the possibility to compare the growth performance of Lithuania and other Baltic countries for Poland is limited to 1929–1938. Table 1 presents also annual GDPpc growth rates.

Table 1. GDP *per capita* and annual growth rates in Baltic countries, Finland and Poland, 1919–1940

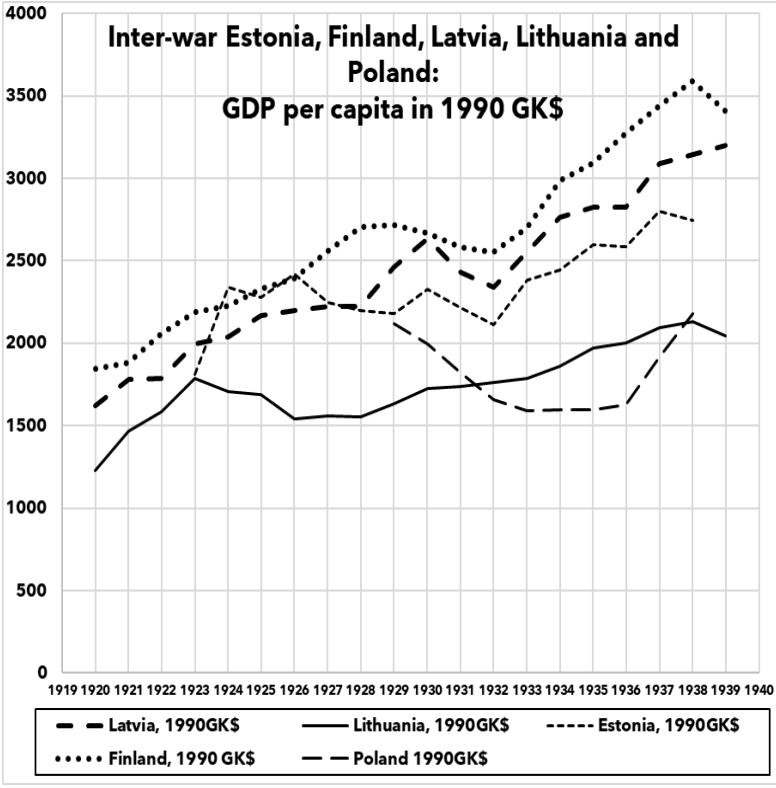
	Estonia		Latvia		Lithuania		Finland		Poland	
Year	GDPpc, 1990int$	Annual growth (%)	GDPpc, 1990int$	Annual growth (%)	GDPpc, 1990int$	Annual growth (%)	GDPpc, 1990int$	Annual growth (%)	GDPpc, 1990int$	Annual growth (%)
1	*2*	*3*	*4*	*5*	*6*	*7*	*8*	*9*	*10*	*11*
1920	ND	ND	1554	Nd	1187	16.72	1846	11.31	ND	ND
1921	ND	ND	1700	9.40	1416	19.29	1884	2.11	ND	ND
1922	ND	ND	1697	–0.18	1530	8.05	2058	9.21	1382	ND

[2] We use data from the MPD 2013, because in later MPD releases base year shifted, making Valge (2003) data for Estonia incomparable with those for other countries.

1	*2*	*3*	*4*	*5*	*6*	*7*	*8*	*9*	*10*	*11*
1923	1811	ND	1921	13.20	1725	12.75	2187	6.26	ND	ND
1924	2337	29.04	1946	1.30	1648	–4.46	2224	1.70	ND	ND
1925	2280	−2.44	2084	7.09	1627	−1.27	2328	4.68	ND	ND
1926	2422	6.23	2094	0.48	1489	−8.48	2392	2.73	ND	ND
1927	2249	−7.14	2149	2.63	1503	0.94	2557	6.91	ND	ND
1928	2201	−2.13	2150	0.05	1496	−0.47	2707	5.87	ND	ND
1929	2182	–0.86	2349	9.26	1577	5.41	2717	0.35	2117	ND
1930	2330	6.78	2538	8.05	1665	5.58	2666	−1.88	1994	–5.81
1931	2219	−4.76	2316	−8.75	1675	0.60	2581	−3.19	1823	–8.58
1932	2110	−4.91	2288	−1.21	1702	1.61	2550	−1.19	1658	–9.05
1933	2385	13.03	2500	9.27	1722	1.18	2702	5.96	1590	–4.10
1934	2443	2.43	2725	9.00	1792	4.07	2988	10.61	1593	0.19
1935	2598	6.34	2776	1.87	1900	6.03	3093	3.49	1597	0.25
1936	2585	–0.50	2797	0.76	1931	1.63	3279	6.02	1625	1.75
1937	2799	8.28	3031	8.37	2019	4.56	3441	4.95	1915	17.85
1938	2745	−1.93	3099	2.24	2057	1.88	3589	4.31	2182	13.94
1939	ND	ND	3132	1.06	1971	−4.18	3408	−5.06	ND	ND
1940	ND	ND	ND	ND	1724	−12.53	3220	−5.50	ND	ND

Sources: Klimantas (2023); Valge (2003); MPD (2013), own calculations.

So according to our data (see also the visualisation of the GDPpc data in the Graph 1), among the five countries under comparison, during the GD real GDPpc contracted most in Poland, decreasing in 1932 to 78.3% of the 1929 level, and recovering to this level only in 1938 (in 1933–1935 was near stagnation with very small growth rates). Latvia was next, its GDP decreasing to 90.15% of the top pre-crisis level (in 1930) in 1932 and fully recovering in 1934. Estonia suffered only slightly less, with its GDP decreasing to 90.56% of the top pre-crisis level (1930 = 100%) by 1932 and fully recovering already in 1933. In Finland (1929 = 100%) GDPpc did fall to 93.85% in 1932 and completely recovered in 1934. Surely, these figures pale compared to the US, which was the hotbed of the GD. In 1935, its GDP was 69.24% of the 1929 level, surpassing it only in 1940 (MPD, 2013).



Graph 1. GDP *per capita* in the Baltic countries, Finland and Poland, 1919–1940

Sources: Klimantas (2023); Klimantas *et al.* (2023); Valge (2003); MPD (2013).

But indeed, the most puzzling finding is that in Lithuania, after 1928, there has been no single year with negative growth of the real GDPpc.

Peculiarities of the GD in Lithuania

This does not mean that Lithuania avoided the crisis. According to our data (see: Table 2), deflation in Lithuania was the deepest among all three Baltic countries, with retail prices in 1935 making out 39.5% of the 1928 level. It could be even deeper than in Poland (although comparability is limited by the application of different indexes), where in 1935, the year of deepest deflation in this country, the wholesale prices made out 53% of the 1928 level.

Table 2. The movement of the prices in Baltic countries, Finland and Poland in 1929–1939

	Lithuania		Latvia		Estonia		Finland		Poland
Year	Retail prices index, 1928 = 100%	Living cost index, 1928 = 100%	Whole-sale prices in Riga index, 1928 = 100%	Food products retail prices in Latvia index. 1928 = 100%	Whole-sale prices index, 1928 = 100%	Cost of living index, 1928 = 100%	Whole-sale prices index, 1928 = 100%	Cost of living index, 1928 = 100%	Whole-sale prices index, 1928 = 100%
1920	ND	ND	ND	94.4	ND	ND	106.19	75.8	ND
1921	ND	ND	ND	86.9	ND	75.9	114.15	94.3	ND
1922	ND	ND	95.3	74.2	93.4	81.3	115.62	91.9	ND
1923	ND	ND	98.4	78.3	94.2	91.1	99.12	92.7	ND
1924	101.2	101.2	101.6	85.7	95.9	83.9	99.12	94.3	ND
1925	108.7	110.2	98.4	94.6	102.5	95.5	101.77	98.4	ND
1926	99.9	104.0	92.2	91.2	94.2	94.6	98.23	96.0	ND
1927	100.1	103.8	93.8	91.8	94.2	93.8	99.12	97.6	ND
1928	100.0	100.0	100.0	100.0	100.0	100.0	100.00	100.0	100.0
1929	96.5	98.0	93.0	112.2	96.7	104.5	95.58	99.2	96.3
1930	80.8	87.5	79.1	95.9	84.3	92.9	87.62	91.2	85.5
1931	70.1	81.8	65.9	68.0	75.2	89.3	82.32	83.9	74.6
1932	56.8	69.2	65.9	51.7	68.6	83.9	88.51	83.1	65.5
1933	47.9	59.8	65.1	53.1	70.2	78.6	87.62	80.6	59.0
1934	45.3	55.8	64.3	51.7	70.2	77.7	87.62	79.8	55.7
1935	39.5	48.9	67.4	48.3	69.4	78.6	88.51	80.6	53.0
1936	41.1	49.7	70.5	51.0	75.2	87.5	91.16	80.6	53.6
1937	47.9	54.8	87.6	61.2	83.5	92.9	107.96	84.6	59.3
1938	48.2	55.8	87.6	67.3	82.6	98.2	100.88	87.1	ND
1939	50.5	58.8	91.5	68.0	85.1	100.0	106.19	88.7	ND

Sources: Hjerppe (1989, p. 278); Knakiewicz (1967, p. 137); Norkus, Ambrulevičiūtė, Markevičiūtė, Morkevičius, Žvaliauskas (2022a; 2022b; 2022c; 2022d); Vaskela (2023a; 2023b).

Therefore, while real GDP did continue to grow, nominal GDP (or GDP at current prices) did contract (similarly to some other European countries) by more than 50% (1930 = 100%) by 1935, which was the year with the most considerable deflation in Lithuania. Lithuanian GDPpc at current prices (i.e., nominal GDP) decreased from 1197 Litas (Lt – Lithuanian national currency) *per capita* in 1929 to 589 Lt in 1935 m. Lt, i.e., 2.03 times. However, in 1935, the purchasing power of Litas 2.45 times exceeded its level in 1929. Therefore, real GDPpc in 1935 by 21% exceeded the 1929 level.

Lithuania did not avoid the crisis because most of its population suffered. The two most affected population groups were farmers (up to 75% of the employed population) and debtors. All farmers suffered because of "price scissors:" the prices of agricultural output decreased more than those of manufacturing, reducing the purchasing power of farmers. The farmer's situation was the same in all comparator countries. Farmers had to sell more to maintain the same consumption level and get production inputs. Debtors did suffer because debts were not denominated according to the inflation rate. So, the worst sufferers were indebted farmers, who needed to sell 2–3 times more to service their debts.

The annual number of forced auctions in 1932–1935 increased up to three times, in comparison with pre-crisis years (Lietuvos Bankas, 1939, p. 3), with indebted farms as the foremost target. In the late summer of 1935, farmers of South-Western Lithuania (Suvalkija) did riot, blocking the roads and clashing with police. Their demands included a moratorium for repaying debts, stopping auctions, and an increase of prices for agricultural products (Černevičiūtė, 2013).

In the economically advanced industrial countries, most painful crisis experience was mass unemployment, with industry workers as main victims. In the U.S, unemployment did rise to 25% of total workforce, and in Germany it was on similar levels (Feinstein, Temin, Toniolo, 2008). In Lithuania, national statistical office did start to publish unemployment statistics only since 1936. It did cover only cities, Therefore, for the GD years, we can only use data from miscellaneous sources (mainly contemporary press), compiled and processed in recent Lithuania dissertations (Černiauskas, 2014; Andrijauskaitė, 2017).

Like in the pre-crisis years, most urban unemployed were construction workers. Their unemployment was seasonal, with peak in January and Feb-

ruary, and ebb in June–July. Contemporary observers report the increase of the winter months' levels of seasonal unemployment during the Great Depression years in larger cities (Kaunas, Klaipėda, Šiauliai), explaining it by immigration of agricultural workers from countryside, whose wages did suffer from decrease of the agricultural products prices (Barkauskas, 1932; Černiauskas, 2014).

Taking examples from foreign countries, since 1933, Lithuanian municipalities organized public works. However, only unemployed with residential qualification of life in a city from one half to three years (depending on city) did qualify for employment at public works (Polkaitė-Petkevičienė, Černiauskas, 2017, p. 71). Sources report strikes and other industrial conflicts caused by the efforts of employers to cut wages. Indeed, nominal wages did decrease (Andrijauskaitė, 2017, pp. 107–110). However, as far as food expenditure did make more than 50% of total expenditure in the urban worker households, due to the drastic decrease in food prices, real wages did increase even in the construction sector, which was most severely affected by the crisis (Norkus, Ambrulevičiūtė, Markevičiūtė, 2019).

The industry workers' situation could be more difficult in comparator countries just because they were more urbanized and had greater manufacturing sectors. In Estonia, Latvia and Finland, both the closing of factories and the increase in unemployed numbers are reported by national statistics. In Latvia, in 1930–1932 urban employment decreased by some 22%, making in 1932 the 78% of 1930 level (Valsts statistiska..., 1936, p. 43). The situation in Poland's industrial regions was even more difficult. According to Koryś (2018, p. 139), at the peak of the GD in Poland up to 500,000 industrial workers could be unemployed. To understand the meaning of this number, according to Poland's population census in 1931, industry and mining employed 2,000,000 persons Koryś (2018, p. 139).

The workers of the public sector, receiving fixed salaries, were winners because deflation increased their real wages. Nevertheless, there was diffuse discontent among them over the decrease in economic welfare too, because, according to legislation in power since May 1, 1932, all Lithuanian state employees with monthly salaries of more than 150 Litas had to pay extraordinary "budget-balancing tax" (Mikalauskas, 2007, pp. 64–65). This tax was progressive and was differentiated territorially as well as according to family

status (officials working and living in the province and singles had to pay more). In 1935, state officials were nudged to buy bonds of the domestic loan to fight the crisis.

How Lithuania's economy could growth despite the deflation?

In our putative explanation of Lithuania's economic growth despite the deflation and contraction of the economies of its neighbors and main foreign trade partners (Germany and the UK), we would like to single out three factors. Firstly, in Lithuania's case, we do not observe a "boom, then bust" pattern, typical for the economic crisis. In this pattern, the contraction of an economy during the recession is preceded by the phase of very rapid growth (up to two-digit annual growth), driven by domestic or foreign credits, and leading to its overheating. The symptoms of overheating are inflation, foreign trade, and current account deficit, and high foreign and domestic private and public debt (Blanchard, 2019).

According to Norkus and Markevičiūtė (2021), Lithuania was the first among Baltic countries to recover from the destruction of WWI. Its advantages were an influx of remittances and capital from the U.S. (emigrants were returning in large numbers) and the monetary union with Germany until the outbreak of hyperinflation in the late Summer of 1922. There was indeed a boom in 1920–1923. However, after Lithuania's introduction of its own currency and interruption of trade with Germany during its hyperinflation, Lithuania suffered from a prolonged crisis, with its GDP decreasing in 1924–1926 (see: Table 1).

This crisis did not end with Germany's economic stabilization since 1924, because Germany switched to agrarian protectionist policies. Only the continuing flow of remittances from the Lithuanian emigrants in the U.S. helped the Lithuanian government to maintain a positive payment balance. Strong growth in 1929–1930 was recovery growth from the preceding depression rather than a boom during the new business cycle. In fact, in 1930, Lithuania's GDP was still below the 1923 level.

Secondly, Lithuania was the least crisis-vulnerable among all the countries we compared. We draw on the distinction between vulnerability and

resilience to exogenous economic shocks, made by Lino Briguglio, Cordina, Farrugia, and Vella (2009) and Briguglio (2016), who applied it in the comparative research on small economies. They define vulnerability "as the exposure of an economy to exogenous shocks, arising out of economic openness, while economic resilience is defined as the policy-induced ability of an economy to withstand or recover from the effects of such shocks" (Briguglio, Cordina, Farrugia, Vella, 2009, p. 239). According to Briguglio's argument, very vulnerable economies (e.g., Singapore in our times) can be highly resilient due to smart government macroeconomic policies, rapidly recovering aftershock, while recovery of much less vulnerable economies may be delayed by the inadequate policies (e.g., U.S. economy during the Great Depression).

According to Briguglio, the most important indicator of the national economy's vulnerability to exogenous economic shocks is its openness, measured by the relation of export to GDP (E/GDP) or the relation of the sum of export and import to GDP (E+I/GDP). Lithuania was the least open Baltic economy. Its interwar period top value of the openness index (relation of export and import sum to total GDP) was 25.98% in 1930 (on the eve of GD). Latvia's (49.23% in 1929) and Estonia's (51.81% in 1928) top values were nearly twice as large. Mean values with all data available for calculations are as follows: Lithuania (1920–1939): E/GDP = 9.60, E+I/GDP = 18.88; Latvia (1920–1939): E/GDP = 13.93%, E+I/GDP = 30.32; Estonia (1923: E/GDP = 19.63%, E+I/GDP = 39.39; Finland (1919–1939): E/GDP 23.55% E+I/GDP; 47.47% (see: Norkus, Markevičiūtė, Ambrulevičiūtė, 2025; Vattula, 1983).

For Poland, we could obtain all data necessary to calculate E/GDP and E+I/GDP ratios only for 1929–1936 period (from Kubiczek, Wyczanski, 2006; Lethbridge, 1985, p. 571). So, in 1929, their values were maximal (E/GDP = 10.82, and E+I/GDP = 22.78), while mean values for 1929–1938 were E/GDP = 8.65% and E+I/GDP = 16.48%. So, taking the results at face value, Poland was the most closed and least vulnerable economy. However, Briguglio recommends applying these indicators only to small economies, and here, the differences in the territory and population sizes of Poland on one side and the remaining countries under comparison impose limits on the usefulness of this measure. With 32,107,000 population (according to the 1931 population census; Mitchell, 2007, p. 6), Poland was a real giant in comparison with

our other countries, and it is known that the openness of the economy is negatively related to the population size.

This is relevant to interpreting also the finding that Estonia's economy was most open. It should be taken into consideration that Estonia was the smallest among Baltic countries according to N of the population (1,116,000 as of 1930), Latvia second largest (1,910,000), and Lithuania the largest (2,354,000) (Norkus, 2021a; 2021b). This may explain why in Estonia, the value of this index never was below 22.00% (1932), while in Latvia, it did fall to 16.96% in 1934, although both countries were very similar in terms of economic structure (Vaskela, 2022). Nevertheless, population size was not the main factor accounting for differences in the openness of Baltic economies, because Finland's economy was more open, although its population (3,463,000 in 1930) was larger (Mitchell, 2007, p. 4).

We would like to conceive vulnerability broader, including variables describing the macroeconomic (dis)equilibrium of a small country at the time it suffers an external shock. They include foreign trade balance deficit, fiscal deficit, the size of public debt, the prevalent share of only a few commodities in the export revenue, and dependence from only a few foreign partners for import and export. Usually, economies are in disequilibrium during the boom (overheating) phases of the economic cycle. So paradoxically (but pertinently to our case) rapidly growing countries are more vulnerable. As far as Lithuania's economy did not "boom" by 1929, when the GD did break out, it displayed all standard features of macroeconomic stability: Lithuania had a balanced government budget, positive foreign trade, and current account balances.

A remarkable feature of Lithuania was very small public debt (by debt/GDP ratio). Estonia and Poland were most heavily indebted, Finland was next, followed by Latvia. This is important because during crisis years, the burden of servicing debt increased. After all, nominal GDP decreased, but debt was not denominated in real terms. As far as state revenue decreases during the crisis, for heavily indebted states the sole solution may be defaulting on their debts.

The third factor that should be taken into consideration in explaining Lithuania's growth performance is crisis management, accounting for its

greater crisis resilience. The relative closedness of the Lithuanian economy was no creation of the self-conscious policies of the Lithuanian government. It was just an effect of the economic underdevelopment of Lithuania as the legacy of Russian rule, which was very different from that received by Estonia and Latvia, which belonged to most advanced regions of the Russian empire (see Norkus, Markevičiūtė, 2021). Lithuania just had very few commodities to sell on competitive foreign markets.

The paramount aim of Lithuanian government was to build up its export basis, making it more open and less dependent on Germany. A happy coincidence, which did provide resources to start the work at the realization of this aim, was the reception of large (measured by the scales of the Lithuanian economy) foreign loan on very favorable conditions. It was provided by the Swedish Ivar Kreuger concern in exchange for monopoly rights of producing and selling matches in Lithuania (Grigaravičiūtė, 1996).

Kreuger's concern had analogous deals with most East European countries, including Estonia and Latvia, where Swedish match monopoly was obtained since 1928. So, by 1930–1931, their governments had already spent this money. Poland received two loans ($6 mil. in 1925 and $32.4 mil. in 1930) from Kreuger, but it was used very differently from Lithuania. Poland used a second loan to increase the reserves of the Central Bank and ensure free convertibility of zloty, which survived until 1936.

Lithuanian government invested the loan into the build-up of a food industry capable of processing primary products (pig meat and milk) into food products, sellable at the more demanding markets (first of all, British) markets. A network of modern dairies producing exportable butter, slaughterhouses, producing bacon, and refrigerators was created. So, in 1930–1932 Lithuania did something like what Poland was done in 1936–1938 under Minister of Finance Eugeniusz Kwiatkowski, who initiated the creation of the Central Industrial District (*Centralny Okręg Przemysłowy* – COP) (see e.g. Koryś, 2018, pp. 239–240; Samecki, 1998). If Poland had conducted Lithuanian policies of 1930–1932, it should have started a project like creating the COP already in 1930–1931.

These investments worked as a "big push," providing for Lithuanian manufacturing an impulse (due to the "multiplicator effect") that ensured

its growth also in later years after Kreuger's loan was spent. Indeed, according to Klimantas's (2023) sector-by-sector analysis of the growth Lithuanian economy, the manufacturing sector was the most resilient (in conspicuous contrast to neighbor countries). For agriculture, forestry, and fishing, Klimantas registered a volume decrease in 1930–1931, but this change may be related not to the crisis but to weather because 1930 is known as a very good cereals harvest year, while in the next year, there was harvest failure. In 1931–1937, the output volume of this sector did only increase.

Concluding remarks

These hypotheses about the causes of Lithuania's economic growth during the GD advanced in the third section of the main part need testing and suggest directions for further research, which should also include the cross-checking of the Klimantas (2023) results by application of other methods of the GDP measurement methods: income and expenditure. An important task of further research is also the re-estimation of the GDP of Estonia, including the extension of the GDP data series to the early 1920s and to 1939. Of particular importance is filling out the GDP data series for Poland for 1920a and re-estimation for 1929–1938, applying one of the direct measurement methods.

Poland's GDP values for this period in the international $ were derived by Angus Maddison himself based on Laski (Laski, 1956, pp. 56–90). However, in addition to these estimates, there are five other estimates: by Knakiewicz (annual series for 1929–1936), C. Klarner (annual series for 1929–1936), Kalecki and Landau (for years 1929 and 1933), Polish National Statistical Office from interwar time (for 1929, 1935 and 1937), and the Section of Economic Sciences of the Polish Academy of Science from the postwar years (annual series for 1929–1938) (Kubiczek, Wyczanski, 2006, p. 637). Due to methodological differences, they widely differ. Best way to resolve these differences is to estimate GDP from primary sources in the contemporary SNA framework. Until this work will be done all conclusions about Poland's growth performance and international standing in the GDP ranking can be only preliminary or tentative.

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From "Golden Ages" of so Called Friendly Tourism to Post-socialist Transformation: The Macro- and Micro-historical Perspectives on the Bilateral Travelling and Tourism between Czechoslovakia/Czech Republic and Poland since 1970s till 1990s[1]

Abstract

This historical study deals with the basic characteristics, parallels and differences that accompanied the existence of travel and tourism in the last phase of the existence of the communist regimes in Poland and Czechoslovakia and later in the first phase of the democratic transformation of the 1990s. This reflection is based on a combination of "macro" and "micro: perspectives ("big" history of travel and tourism vs. "history seen from below" and the history of everyday life with overlaps to the history of society). This work is based on the analysis and interpretation of a wide range of sources, especially archival ones (from the National Archives in Prague and the Security Forces Archive of the Institute for the Study of Totalitarian Regimes in Prague) and also the contemporary press and the oral history interviews preserved in the Institute for Contemporary History of the Academy of Sciences of the Czech Republic.

Keywords: tourism in communist Poland and Czechoslovakia, travel in Central and Eastern Europe, political transformation, everyday life, oral history, archival sources

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Od „złotych lat" tzw. turystyki przyjaźni do transformacji postkomunistycznej: makro- i mikrohistoryczne perspektywy podróży i turystyki między Czechosłowacją/Czechami a Polską od lat 70. do 90. XX wieku

Abstrakt

Niniejsze opracowanie historyczne przedstawia podstawowe cechy, podobieństwa i różnice towarzyszące zjawisku podróży i turystyki w ostatnim okresie istnienia reżimów komunistycznych w Polsce i Czechosłowacji, a następnie w pierwszej fazie transformacji ustrojowej lat 90. XX wieku. Refleksja opiera się na połączeniu perspektywy „makro" i „mikro" – „wielkiej" historii podróży i turystyki z „historią widzianą z dołu" oraz historią życia codziennego, z uwzględnieniem szerszego kontekstu społecznego. Praca bazuje na analizie i interpretacji szerokiego spektrum źródeł, zwłaszcza archiwalnych (m.in. z Archiwum Narodowego w Pradze oraz Archiwum Służb Bezpieczeństwa przy Instytucie Badania Reżimów Totalitarnych w Pradze), jak również prasy z epoki i wywiadów historii mówionej przechowywanych w Instytucie Historii Współczesnej Czeskiej Akademii Nauk.

Słowa kluczowe: turystyka w PRL-u i Czechosłowacji, podróże w Europie Środkowo-Wschodniej, transformacja ustrojowa, historia życia codziennego, historia oralna, źródła archiwalne

Introduction

Traveling as a part of lifestyle and tourism as a growing economic, but also socio-cultural sector and specific sphere was and still is one of the main pillars and manifestations of modernization processes. It was no different in the case of the former Czechoslovakia and later the Czech Republic. Given its geographical location in the middle of Europe and often in relation to its neighbors, which included and still includes Poland, since the beginning of modern times one of the main components of tourism and one of the key segments of travel has gradually been formed and developed here, which is cross-border mobility and domestic or international tourism. (Palatková, 2011; Štemberk, 2009; Jakubec, Štemberk, 2018; Mücke, Krátká, 2018). Despite the Cold War era and the existence of the Iron Curtain between the West and the East, travel and tourism continued to develop – perhaps surprisingly for some – and with the general development of civilization. It moved into new dimensions – in particular, it grew in numbers, but it also

began to affect and to attract a wider range of social groups that did not travel much before the Second World War and did not participate much in shaping the tourism sector (e.g. workers, women, youth, people from the countryside, etc.). The regimes and states leadership, as well as domain actors, based on the practice of the time (related mainly to economic results and economic aspects) and also through the growing voice and influence of expert knowledge in policy-making, began to realize that tourism also requires its own distinctive plans and a longer-term management and development strategy (Mücke, 2017; Sowiński, 2005). Bilateral relations in the field of travel and tourism between Czechoslovakia (later, after 1993, the Czech Republic) and Poland can therefore be perceived as a "living laboratory" for the formation of a complex network of relations between two Central European countries, which was manifested, among other things, in both foreign and domestic policy, as well as through the creation of models of "governance" upon a sphere of travel and tourism which was functioning on several vertical and horizontal levels.

If I were to summarize the most important facts from the contemporary context after the end of World War II, both countries had in common the restoration of state independence and sovereignty. While Czechoslovakia, except for the loss and "reduction" of Subcarpathian Ruthenia (in favor of the USSR), achieved both the Czech lands and Slovakia within the original pre-Munich borders, which was, among other things, the goal of the Czechoslovak resistance movement. The situation of Poland was much more complicated. If we ignore the fact that the new pro-Soviet "Lublin" government, at the expense of the London government-in-exile, was striving for its legitimacy both internationally and among the domestic population, Poland itself as a state entity "moved" geographically westward to completely new borders lying on the Oder and Neisse rivers and to the territory that belonged to Germany before 1939. Together, the two countries also shared a significant socio-demographic transformation in the newly acquired or returned borderland, as members of "hostile minorities," mainly local Germans, were removed from the border areas and the regions were resettled both from the interior and by immigrants from the eastern or "ceded" areas (especially in the Polish case), or re-emigrants from abroad (especially in the Czechoslovak case). Czechoslovakia was not only a direct neighbor and fellow traveler with

Poland within the pro-Soviet oriented Eastern Bloc, but also shared with it its second longest interstate border (after that with the Soviet Union) with a length of 1310 km, which in times of good international political climate and good level of mutual relations provided good conditions for the potential development of mutual relations and contacts, including those of travel (Stokłosa, 2013).

In the first post-war decade, relations between the two countries were not at all warm, which was also reflected in the regime of cross-border travel and the relatively limited development of mutual tourism in terms of numbers and quality. This consisted mainly of the reciprocal exchange of delegations and tourist expeditions, which were usually organized by pro-regime mass organizations such as communist parties, trade unions or children and youth organizations, via preferred economic enterprises, sports associations or clubs, by educational or cultural institutions or by the extraordinary preferred military or security forces. If travel took place on a commercial basis, it was primarily mass tourism in the form of tours operated by travel agencies controlled by the regime (such as ORBIS on the Polish side, or ČEDOK on the Czechoslovak side). All these activities had an official common denominator in the form of efforts for selective, formally "representative" and at the same time pro-regime travel. On the other hand, individual travel, including family trips and trips to visit relatives, remained very limited (Vaněk, 2009, pp. 655–681).

The period of de-Stalinization after 1953 in Czechoslovakia, or 1956 in Poland, brought about a significant change in this respect in the form of liberalization. The negotiation of the Czechoslovak-Polish agreement on the so-called small border traffic for the High Tatra Mountains region was a symbolic breakthrough in the overall post-war regime of travel abroad. The agreement, signed in the autumn of 1955 in Prague, entered into reality on Sunday, April 22, 1956. Crossing the border in the designated area was allowed not only with a passport as before, but also with a duly confirmed tourist pass (with an identity card). As the Czech historian Jan Rychlík recalled at the time, for the first time in the post-war period, such blameless and "regime-loyal" Czechoslovak and Polish citizens could legally cross the border without a passport. Although the (re)opening of borders for individual travel and unorganized tourism brought with it, in addition to the freedom to travel and explore neighboring regions, some negative aspects, such as an increase in

cross-border smuggling and an increase in the intensity of illegal trade in scarce goods in the border area, the interested governments of both countries decided to continue developing the pilot project and from June 1962 the areas for "small border traffic" were expanded to include the Krkonoše, Kladsko and Dukla regions (Rychlík, 2007, pp. 54, 61; Podemski, 2011, pp. 215–217; NA, 1954–1962, pp. I, II, III). The project to support "regulated" travel was thus intended to become a "showcase" for the gradually emerging "friendly tourism" between the Central European countries of the Eastern Bloc, to which the German Democratic Republic gradually joined after the so-called second Berlin crisis (and the construction of the Berlin Wall in the summer of 1961), and after the pacification of the consequences of the Hungarian Revolution, Hungary also joined (after 1964).

The main aim of this brief reflection is to reflect on the parallels and differences seen from a historical perspective that accompanied the existence of travel and tourism in the last phase of the existence of the communist regimes in Poland and Czechoslovakia and later in the first phase of the democratic transformation of the nineties. This reflection is based on a combination of "macro" and "micro" perspectives ("big" history of travel and tourism vs. "history seen from below" and the history of everyday life with overlaps to the history of society). In addition to findings from existing scientific literature, this work is based on the analysis and interpretation of a wide range of historical sources, especially archival (from the National Archives in Prague and the Security Forces Archive of the Institute for the Study of Totalitarian Regimes in Prague) and then on the contemporary press and also oral history interviews with both representatives of the tourism industry and former "ordinary" participants traveling abroad. These interviews are then preserved in the oral history collections of the Institute for Contemporary History of the Academy of Sciences of the Czech Republic.

Historical context of post-WWII tourism development in Czechoslovakia and Poland till 1960s

Otherwise, if I were to briefly characterize the context of the period for a better understanding of the issue, the historical realities and "limits" of the events of the period were relatively similar: geopolitical dependence on the

USSR and the Eastern Bloc, governance through directives of the Communist Party dependent on Moscow and the existence of a centrally planned and controlled economy and therefore the prevailing "economy of scarcity" (especially of certain types of food and consumer goods). However, the approach of the two countries to the issue of travel and tourism differed to some extent, where the Polish side practiced a much more liberal stance towards its citizens in the area of passport and visa policy (including a more liberal assessment and approval of trips behind the Iron Curtain), which partly resembled the approach of Western countries and was primarily based on pragmatic economic considerations and often left a significant part of the initiative to its citizens (e.g. by calling for individual hitchhiking during long-distance travel, or by allowing legal work abroad) (Keck-Szejbel, 2011). Illegal stay of a Polish citizen abroad was not considered a crime (as it was in the eyes of the Czechoslovak authorities when assessing their own citizens), but was qualified as a minor offense. (Mücke, Krátká, 2018, p. 150; Stola, 2015).

The Czechoslovak regime was considerably more conservative in the area of passport and visa policy, ideologically more rigid, and in many cases it took into account ideological aspects and the interests of its Soviet "brother" and protector in international issues rather than the interests of its own country and its citizens. A very audible voice in the implementation of its own policy was heard from the ranks of the Czechoslovak security officials demanding rather repressive procedures, who feared the potential emigration of Czechoslovak citizens from Czechoslovakia to the West – it must be said that in many cases they were justified. However, the concerns of the Czechoslovak security officials that emigration would not reach mass phenomena, turned out to be non-realistic and the total number of emigrants annually reached the order of percent of the total number of passengers. In no way could they be compared, for example, with the rate and numbers of GDR citizens emigrating to the West (especially before 1961).

According to available data, foreign travel was much rarer for the average Pole in the 1950s and 1960s than it was for the inhabitants of Czechoslovakia or Hungary. For example, in 1966, 948,000 Polish citizens traveled abroad, compared to 953,000 Hungarians and even 1,964,000 Czechoslovak citizens. In proportion to the total population, in the mid-1960s, the share of travelers was 4% among Poles, 9.5% among Hungarians and 14% among Czechoslo-

vaks (Podemski, 2011, p. 217). Most of the trips took place within the Eastern Bloc countries and, for example, available Czech statistical data show that only about one in ten trips went behind the so-called Iron Curtain. Trips to the West were therefore an absolutely exceptional experience for both ordinary Poles and Czech citizens (Mücke, Krátká, 2018, pp. 561–577).

Polish tourism policy was much more pragmatic, flexible and agile, which was reflected not only in the pro-business approach in negotiations, but also in the search for the most ideal models of control and influence on tourism. Therefore, a key executive body in the form of the State Tourism Committee was placed in the center of power in the power structure, directly under the authority of the Prime Minister and his office. Czechoslovak officials only developed this model in 1963, when the Government Committee for Tourism was established as the top body for managing the sector, which, after the federalization of Czechoslovakia, was divided into two republican committees in 1969 – Czech and Slovak. However, when the Czechoslovak federal elites of a conservative nature, who were also striving for the occupation of Czechoslovakia in August 1968, the centralization of state management and control over society, discovered that issues of international mobility in particular could not be resolved at such a "low" level, a third committee was established, the Government Committee for Foreign Tourism (Mücke, 2017, pp. 234, 283) The establishment of the entire sphere in Czechoslovakia, which found itself in a phase of very dynamic development, thus became somewhat complicated and formally not entirely clear, similar to what was the case during the first "travel expansion" in the second half of the 1950s.

Czechoslovak and Polish tourism during "long" 1970s

The invasion of the Warsaw Pact armies and the occupation of Czechoslovakia in August 1968 (at least for a while) severely damaged the idea of "friendly tourism," as some Czechoslovak citizens abroad, as well as employees in hospitality and accommodation facilities or travel agencies in Czechoslovakia openly told foreign tourists from the "occupying countries" (especially Soviet tourists) what they thought about the "friendly invasion," and this led to mutual conflicts (especially verbal ones). The newly established conservative regime in Czechoslovakia then made great efforts to prevent

these, from its point of view, undesirable cases from occurring, and therefore not only were protesting individuals reassigned to less prominent positions or even dismissed. "Instructional campaigns" were also carried out among employees in the hospitality and tourism industry, which were supposed to prevent these dissenting expressions. Despite these campaigns and threats, these forms of protest continued to appear for some time, at least until the summer of 1969, when, with the help of new legislation (e.g. the so-called baton law), anti-occupation demonstrations were severely and massively punished (NA, 1968–1971, p. I). The campaign of Czechoslovak conservatives and "normalizers" against representatives and sympathizers of the pro-reform movement from the times of the so-called Prague Spring continued until the early 1970s and was simultaneously accompanied by efforts to "re-start" and continue the development of mutual tourism with the so-called socialist countries, despite existing limits – in the case of Poland, especially economic ones (NA, 1968–1971, p. II). One of the complementary parts of this bilateral negotiations was the "evergreen" issue of "shopping tourism," buying up scarce goods, cross-border smuggling and illegal trade. (NA 1971–1976: I, II).

After Czechoslovak tourism officials managed to turn the passive balance of mutual tourism with Hungary into an active one in the early 1970s, Czechoslovakia then became a country with an active trade balance in terms of economic data, compared to all its Central European neighbors – both "friendly" (Poland, Hungary, GDR) and Western (Austria, Germany), which lasted until the fall of the communist regime (NA, 1968–1971, p. II; Franke *et al.*, 1982, p. 374). When, as a result of the policy of détente and "Ost-Politik," relations between Poland (1972) and Czechoslovakia (1973) with the Federal Republic of Germany (but also with its eastern counterpart, the GDR) were normalized, new interstate agreements on tourism were gradually concluded and a new era of Central European travel began, which can be boldly called the "golden times of friendly tourism."

Although the vast majority of Poles of that time who traveled abroad to the GDR (about 90% of almost 11 million trips in 1972, including one-day trips), the Czechoslovakia was the second most visited country among Poles, from the opposite perspective, the citizens of Czechoslovakia visited their northern neighbors as their third most popular and most visited destination

(after the GDR and Hungary) (Podemski, 2011, p. 218; Franke *et al.*, 1982, pp. 369–393; CPCR, 1973, pp. 107–108). In 1977, a total of 1.9 million Czechoslovak tourists went to Poland, and 4.8 million Poles went in the opposite direction; a year later, which was the most successful of the entire decade, over 5 million visitors from Poland visited the Czechoslovak Socialist Republic (however, with an average length of stay of only 1.4 days), and conversely, over 2 million of its citizens traveled to Poland from Czechoslovakia (CPCR, 1978, p. 193). Already in 1979, the number of visitors from the Czechoslovak side began to decline and only 1.9 million Czechoslovak citizens traveled to Poland, and similarly, only 4.6 million passengers from Poland headed to the Czechoslovakia (CPCR, 1980, pp. 67, 104; Franke *et al.*, 1982, p. 376).

Until 1977 and the conclusion of the bilateral Czechoslovak-Polish agreement on tourism (signed in July 1977 in Warsaw), most mutual tourist contacts took place either on the basis of "small" border travel along the ridges of the border Krkonoše Mountains, or on the basis of group tours implemented through travel agencies and other organizations, or on the basis of the so-called personal invitation of individuals by the visiting party. Based on the new agreement, it was then possible to formally travel across the border without a visa, but the traveler was obliged to exchange a certain amount in the currency of the visiting state per day, which amounted to 170 PLZ for a Czechoslovak tourist and 80 CZK for a Polish traveler (with the exception of small children). For the purposes of sports tourism, it was also possible to sail along the border sections of the Poprad and Dunajec rivers and land on the banks at designated places (CPCR, 1977, p. 186).

The main destinations of Polish tourists travelling to Czechoslovakia, who came here mainly in the summer months, were Prague, Brno, Bratislava, the High Tatra Mountains region and also West Bohemian spas. In general, a significantly limiting factor in the development of visitor numbers was the fact that Czechoslovakia did not have sufficient accommodation capacity, which is why 80% of visitors came only for one-day trips (CPCR, 1977, pp. 97–98). Czechoslovak citizens arriving in Poland individually in their cars, on the other hand, were often very attracted by the possibility of camping here. As one of the experts and delegates of the time says: "They are served by a dense network of campsites spread along the 524 km long sandy coast of the Baltic, along the mountain ridges, in the valleys of the Carpathians and the Giant

Mountains, by thousands of lakes and clean rivers. Everywhere there, people will find peace and excellent relaxation as well as many natural beauties." He then reminds us of other Polish plans that: "In the years 1977–1980, another 220 new campsites for 60,000 people are to be put into use and some older ones will be modernized. The new campsites will be in the most attractive areas, such as in the Bieszczady Mountains, in the Podkarpackie Voyevodship on the Masurian-Augustow Lakes and on the Baltic coast" (CPCR, 1978, p. 41).

As is evident from the previous account, the period's expansion of Polish tourism greatly appealed to some Czechoslovak observers, who then carefully reported on it in the pages of the period's trade press. Although, according to contemporary data, at the beginning of the 1970s, the Czechoslovak Socialist Republic held a much stronger position in international tourism in terms of results (e.g. in 1972, the share of Polish tourism on a global scale was 4.2% compared to the Czechoslovak share of 5.6% – compared to the clear leader of the countries of the so-called socialist camp, the German Democratic Republic with 15.9%), the example of Polish development was presented as very inspiring for the Czechoslovak environment as well (CPCL, 1974, p. 34).

For example, Czechoslovak experts noted massive development and investment in the Polish environment, especially the construction of new hotels, autocamps, construction of expressways (especially in the north-south direction to the Baltic), or the introduction of new technologies into operation (especially new generations of computers, control and reservation systems in the hotel industry and travel agency operations). In this context, the IHC hotel in Warsaw, equipped with the POL-GAST system developed in Poland, is mentioned in particular (CPCL, 1974, p. 272). Furthermore, the press published an admiringly worded report on the opening of the new Polonez hotel in Poznań under the auspices of the ORBIS trust, which fascinated Czechoslovak writers with the fact that it was put into operation very quickly, in an unbelievable 15 months, by the standards of Czechoslovak socialist construction, due to the use of prefabricated parts (CPCL, 1975, p. 186).

Very careful attention was also paid to reports of price increases in the Polish tourism sector since February 1974 (e.g., a 70% increase in the price of alcoholic beverages, a 200% surcharge on coffee, tea, dishes made from potatoes, or based on fresh vegetables), which, following the Hungarian model,

were officially supposed to bring about an "increase in profitability" of the sector and also to ensure a higher standard of services provided (CPCL, 1975, p. 114). Whether the increase ultimately had the desired effects is not evident from further reports.

In connection with the very successful tourist season of 1978, the Czechoslovak press also recalled the great success of Polish industry diplomacy, when Poland managed to obtain and, above all, successfully host the 9th Annual Congress of the International Hotel Association (IHA) at the Warsaw Victoria Hotel. The fact that this prestigious event with a global outreach (and a positive local impact and a number of multiplier effects) was held for the first time in a country of the "socialist camp" was also recalled (CPCR, 1979, p. 61).

Rises and falls of bilateral tourism in "short" 1980s

The end of the 1970s marked a significant turning point in mutual tourist reality. As a result of the so-called second wave of oil shocks, which had already significantly affected the countries of the Eastern Bloc, foreign travel also became significantly more expensive and therefore the number of visitors decreased. Problems in the economies of the countries themselves also began to multiply more and more frequently – which was especially the case in Poland. Despite the positive and massive promotional campaigns led by both Czechoslovak and Polish representatives of the tourism industry, the shortcomings could only be hidden from the public with great difficulty and were also sensitively perceived by Czechoslovak tourists. For example, when in the autumn of 1981 three Czechoslovak popular daily newspapers and magazines (Mladá fronta, Smena and Svět v obrazech) announced the results of their survey on how their readers evaluated their holiday vacation, out of 5,883 writers, they agreed that in Poland they were most attracted to visiting Warsaw, followed by the border mountain regions, the Baltic coast and the Masurian Lakes. In general, Poland was appreciated as a holiday destination in relatively positive way, but at the same time, economic difficulties affecting holidaymakers' stays were mentioned (e.g. lack of certain types of food, drinks or groceries in restaurants, bars or shops) (CPCR, 1981, pp. 84–86). Despite the economic stagnation (and the beginning of the crisis) of the

1980s, tourism, unlike other sectors, was still considered by socialist planners in the 1980s to be one of the most profitable parts of the national economies of the Eastern Bloc countries (CPCR, 1988, pp. 160–163). In addition to economic woes, in the case of Poland, there were also twists and turns on the domestic political scene, which resulted in the declaration of martial law and the rise of the regime of General Wojciech Jaruzelski. This also had an immediate impact on Czechoslovak-Polish tourism. In December 1981, the Czechoslovak authorities first unilaterally suspended visa-free travel and later even partially closed the Czechoslovak-Polish border.

As the Czechoslovak delegate of the Čedok company in Warsaw, for example, very emotionally states in his reports from January 1982: "Hotels and restaurants are currently empty. The last Western clientele (mostly Arab) hastily left the Poland after the declaration of martial law. The movement of residents as foreigners is strictly regulated (exclusively with emergency passes and from city to city). A ban on gatherings has been declared. Congresses, symposiums as well as domestic conferences, meetings and meetings are not held. Air traffic is stopped – individual flights are allowed to bring Polish tourists who are abroad. Some important international connections (e.g. Batory) and important domestic connections have been canceled from train transport. Ship traffic is stopped" (ABS – I).

The delegate originally born in Slovakia then reported to Prague that immediately after the declaration of a state of emergency, the economic situation worsened and there was a shortage of food, consumer goods and also fuel. There were supposed to be several-day queues for fuel at gas stations and one of the Warsaw gas stations was reserved for foreign workers, where they could buy a maximum of 20 liters per visit. In addition to the established rationing system for goods and food, all kinds of fraud and black market trading in foreign currencies were said to be flourishing among the people. The new Polish government then tried to counter the economic collapse with measures increasing the prices of goods and partly increasing the salaries and wages of employees. In addition to these concerns that brought the life of a foreigner closer to the everyday concerns of Polish citizens, the main problem for the delegate and his branch was the fact that after the declaration of a state of emergency, domestic and outbound tourism from Poland practically stopped and inbound tourism was radically limited. The

state-owned company Orbis cancelled all trips to Czechoslovakia until the end of March 1982, which effectively meant the loss of the entire winter ski season. The Czechoslovak delegation of Čedok was thus forced to deal with a lot of administration related to cancellations in the first months of the new calendar year, but without any prospect of any profit (and therefore potential rewards for the employees involved) (ABS – I).

Even after the suspension of the state of emergency in 1982 and its abolition in 1983, the relatively liberal travel regime between Czechoslovakia and Poland, as it existed in the second half of the 1970s, never fully returned. Travel from Poland to the Czechoslovakian SSR was only possible to a limited extent, with a passport and either with group tours (travel agencies, etc.), individually at the invitation of a close relative one or after purchasing Czechoslovak travel vouchers (for services); individual trips by Czechoslovak citizens to Poland, as well as Poles to the ČSSR, were also limited to a maximum of four per year since 1980 (except for those for humanitarian reasons) and were subject to the mandatory exchange of at least an amount in foreign currency. As Jan Rychlík reports, while among Czechoslovak citizens these measures brought a significant reduction in the number of individual trips to Poland, Polish citizens were allegedly not deterred by these measures in any way, because in the event of an individual need to "increase" trips above four per year, they were able to use the so-called transit, which remained permitted (Rychlík, 2007, p. 98). In addition to the traditional negatives in the form of buying up shops and "excessive levels" of "shopping tourism," the "normalized" Czechoslovak regime feared the spread of "subversive ideas" and "diverse ideology" from a country where anti-communist activities were rampant, led by the Solidarity movement or the activities of the Catholic Church, and therefore feared the possible "transportation" and "infiltration" of these phenomena into the Czechoslovak socialist reality (Kamiński, 2019; Blažek, 2017).

Late-normalizing Czechoslovakia, together with some other "friendly states" (e.g. the GDR, the USSR or Bulgaria), was in fact violating the international agreements concluded by it – and the Polish regime, despite its efforts to restore "pre-crisis" relations, had to tolerate this willy-nilly (Rychlík, 2007, pp. 96–106). In retrospect, however, it can be said that this represented a significant blow to the long-standing and promoted idea of equal and fair

"friendly" tourism. Reports in the trade press of the time could hardly conceal not only the significant problems of Polish tourism, but also a significant crisis in mutual relations (CPCR, 1984, pp. 224–225). On the contrary, negotiations on mutual payments for tourism and quotas for "non-trade exchanges," including the parity-based part of active and passive tourism, showed that the countries of the Eastern Bloc, rather than being a "camp of peace and socialism," were increasingly becoming, in the words of historian Jan Křen, a "conflicted community," where power-ideological interests and the power of Western foreign exchange, on which these countries were (paradoxically) increasingly dependent, openly prevailed (NA, 1980–1989, pp. I, II, III).

Otherwise, at the beginning of the 1980s, there were three railway border crossings between the two countries intended for long-distance transport and tourism (Lichkov – Międzilesie, Petrovice u Karviné – Zebzydowice, Plaveč – Muszyna), eight crossings for international road and freight transport and five "local" crossings intended only for bilateral travel, which was confirmed by state representations for the second half of the 1980s (Franke *et al.*, 1982, pp. 236–238; NA, 1980–1989, p. IV). Both regimes, pragmatically and from the perspective of the development of trends in tourism (which tended to individualize travel), somewhat in "old-fashion" way preferred and promoted collective forms of travel mediated by state travel agencies, which, in addition to the possibility of increasing direct revenues to the state budget, was also, from their perspective, an opportunity to better direct travelers and "state-security" control them during their trips abroad (CPCR, 1984: p. 38; CPCR, 1986, p. 124; Persak, Kamiński, 2010). In addition to traditional destinations, the Polish side also began to deliberately promote and encourage visits to regions that had not been so open to tourism until now, such as southern and southeastern Poland and the Bieszczady, Pieniny regions or the Polish parts of the Silesian Beskids (CPCR, 1984, pp. 224–225).

How did these historical "whirlwinds" ultimately affect the overall balance of mutual visits? Visits to Poland by Czechoslovak travelers were already falling significantly at the turn of the seventies and eighties (1979 – 1.9 million trips, 1980 – less than 1.7 million) and then dropped sharply to less than 400 thousand in 1981 and then remained in the hundreds of thousands annually (1983 – 181 thousand; 1984 – 211 thousand; 1985 – 273 thousand; 1986 – 364 thousand; 1987 – 559 thousand) (Franke *et al.*, 1982, p. 376; SY,

1988, p. 522). On the other hand, Poles to the Czechoslovakia – at least according to the Czechoslovak statistics – continued to travel till the turn of the decade (1979 – 4.6 million trips, 1980 – 4.6 million trips, 1981 – 4.4 million trips) and a significant drop occurred only as a result of the state of emergency, when, for example, In 1983, only 2.2 million tourists arrived in the Czechoslovakia, before it started to climb again (1984 – 3 million trips; 1986 – 4.2 million trips; 1987 – already 5 million trips, of which 4.2 million were formally reported as "transit"), when Poles were the second most numerous "visiting" nation in the Czechoslovakia after the East Germans (with 9.3 million travelers in 1987) (Franke *et al.*, 1982, p. 376; SY, 1988, p. 521).

Statistical data show that in the second half of the 1980s, although the number of passengers was increasing, the economic situation of the Eastern Bloc countries was rapidly deteriorating, which led, among other things, to an increase in cross-border "shopping tourism," which was perceived rather negatively by the regime. According to industry planners, this not only destabilized the domestic consumer market, but also complicated mutual relations between formally "friendly" countries in the eyes of political elites, and they were collectively wondering how to prevent these "externalities" (Habigtová, 1990, pp. 42–43). However, as practice showed, it was essentially an unsolvable task, which conflicted with the efforts to bring closer together and "open borders" (with the prospect of potential foreign exchange earnings) and the inability of the planned socialist economy to produce and "distribute" the demanded quantity of products or services to the formally "controlled market."

This was also significantly influenced by changes in the parameters of the existing environment, where while in 1948 only 44% of foreigners from countries with a "planned economy" were coming to Czechoslovakia, later the level of mutual visits with the so-called socialist countries (and therefore solving similar problems) constantly increased, until in the eighties it constituted more than 90% of international tourism. According to official statistics, 22.8 million tourists from the so-called socialist countries visited Czechoslovakia in 1988 and 6.6 million Czechoslovak tourists traveled in the opposite direction (Habigtová, 1990, p. 41). From the point of view of experts (and planners) of the Czechoslovak tourism, there was a problem that even a favorable geographical location or natural and cultural background did not

bring adequate results and Czechoslovakia, with its structural shortcomings (e.g. insufficient number of accommodation facilities or imperfect transport infrastructure) and its long-term reputation as a "low-cost" destination, collected much smaller revenues. In the mid-eighties (1985), Czechoslovakia earned only 80 million US dollars a year in so-called free currencies from inbound tourism from foreign tourists, compared to Poland 90 million, the Soviet Union 150 million, Bulgaria 170 million and Hungary even earned 286 million dollars (NA 1980–1989, p. IV). The dream of "friendly tourism" was thus in practice experiencing significant cracks, and in the case of Czechoslovak-Polish relations, as reality showed, a significant part of mutual contacts based on individual tourism was essentially only tolerated as a "necessary evil" by conservative figures (such as the Czechoslovak State Security or the conservative part of the communist leadership) rather than being supported.

Epilogue: 1989 Revolutions, fall of the Iron Curtain and the eve of democratic transformation era of 1990s

The series of revolutions in Central Europe and the fall of communist regimes, together with the collapse of the Iron Curtain, brought, in the words of the West German popular rock band Scorpions, a completely new "wind of change" to mutual relations in the field of travel and tourism. As early as December 1988, the Polish government began issuing passports valid for all countries in the world to its citizens, but on the Czechoslovak side, travel restrictions against Poles – despite the personal friendships of some of the new Czechoslovak and Polish elites from the former dissent, led by Václav Havel, Jiří Dienstbier or Lech Wałesa, Adam Michnik, or Jack Kuroń – remained in force even after the Velvet Revolution of 1989 (Blažek, 2008). Polish citizens could only travel freely to Czechoslovakia with a passport from the late spring of 1991 (Rychlík, 2007, pp. 96–106).

The economic problems were certainly not solved by some "wave of a magic wand" from one day to the next, but rather it was a longer-term process stretching over the entire decade, amplified by the "on the fly" political and economic transformation (inspired mainly by neoliberal ideas and characterized in particular by decentralization, "denationalization" and privatiza-

tion) implanted in a very complicated post-socialist environment. In the Czech-Slovak environment, this was also amplified by a new round of negotiations on Czech-Slovak relations, this time in free, post-socialist conditions, which ultimately resulted in the so-called Velvet divorce in the form of dissolution and a joint federation and the creation of two successor states (Rychlík, 2002). As oral history research related to the period of the nineties shows, shopping tourism continued to be one of the very strong motivations for setting off across border crossings, whether to Poland or to Czechoslovakia, respectively, later to its two successor Czech and Slovak republics. This type of shopping then – seen in retrospect only temporarily – began to disappear only at the turn of the millennium after the stabilization of domestic economic conditions and also with the expansion of the retail offer (e.g. through newly built shopping centers and chains) (Mücke, 2016).

What is also evident is that the tourism sectors of both countries have been increasingly internationalizing and integrating into the globalized tourism environment. This has been done in various ways and directions, whether through the expansion of global hotel chains, transport companies, or travel agencies, through more intensive integration into the international transport network and infrastructure (e.g. the opening of a new international airport terminal in Warsaw in 1992, or the reconstruction of the existing one in Prague in 1993 and preparations for the construction of another, completely new one since 1995), or through the transformation of travel habits and the "culture of travel." At least some of the Czech and Polish travelers, who, with the gradual increase in their purchasing power, but also with the increasing average knowledge of foreign languages and orientation in the international environment, could abandon the previous "low-budget" ways of travelling and afford to spend their holidays in the "Western style" (i.e., using air transport, hotel accommodation or an "all-inclusive" catering regime). Independent and "non-family' travel by members of the strong young generation born in the seventies, which began to take advantage of the new waves of benefits and discounts for young people under 26 provided by various organizations and operators active in transport and tourism, also spread greatly (CPCR, 1990, p. 15).

If we look at the available statistical data – the collection possibilities and the informative value of which began to change significantly with the change

in travel habits – the Czech Republic experienced a travel boom in the mid-1990s, when almost five times as many people traveled abroad as there were inhabitants of the country (1993 – 31 million people; 1996 – 48.8 million; 2000 – 38.2 million). In Poland, this increase was also noticeable and then delayed in time by about five years, with a peak at the turn of the millennium (1990 – 22 million people traveling; 1993 – 31 million; 1995 – 36 million; 2000 – 57 million) (Mücke, 2016, pp. 629–630). The data also shows that after the fall of the Iron Curtain and the collapse of Czechoslovakia, there were significant shifts not only in numbers but also in target destinations.

In the first post-revolutionary year (1990), more than 13 million passengers from Poland visited Czechoslovakia, which was almost two million more arrivals than in the previous year and this placed Poles in second place in the visitor ranking after citizens of the Federal Republic of Germany; in the last year of the existence of the Czechoslovak federation, almost 16 million Polish citizens visited Czechoslovakia. In the second year of the existence of the independent Czech Republic (1994), this number was already 21 million Polish citizens (SY, 1991, p. 493; 1993, p. 281). However, as specialists in period statistics remind us, these numbers are significantly distorted by the fact that they do not represent the number of ordinary tourists and passengers, but a significant percentage is made up of so-called cross-border commuters, whose activities include, for example, consisted in transporting permitted and duty-free quotas of food, consumer goods, or fuels, which were still in short supply in Poland. Much more informative are the statistics on the number of visitors to accommodation facilities in the Czech Republic and also later overviews of longer trips for the purpose of spending free time (for three or more nights). Among those staying overnight in the Czech Republic, Poles occupy rather middle positions in the ranking (in 1994 – 114 thousand, i.e. 3.8% of the total number of overnight stays, among whom Germans are unrivaled leaders, followed by Austrians and Slovaks) and only gradually does Poland's position as a significant incoming destination from the Czech perspective begin to strengthen (in 2000 – 396 thousand overnight stays, i.e. 6.4% of the total number) (SY, 1993, p. 281; 2001, p. 517). As for the popularity of Poland as a tourist destination from the perspective of Czechs, Poland has been declining since 1989 and, with the opening of other travel options, it has suddenly found itself at the almost complete tail of the peloton of reg-

istered countries, although we can only judge this based on statistics from the second half of the nineties (1998 – 14 thousand trips; 2000 – 9 thousand trips) and, conversely, the ranking of countries visited by Czech tourists is dominated by Croatia, Slovakia and Italy (SY, 2001, p. 519).

A significant revival impulse for the rapprochement of the two countries, strengthening the trend of neighborhood and mutual visits was the joint entry into the European Union (2004) and the subsequent "invisibility of borders" in the form of entry into the Schengen area (2008). Judging by relatively recent quantitative research, contacts between the two countries are based on historical traditions, based on considerable continuity and offer great potential for further growth, where the only exception in intensive contacts in border regions is the remote and by transport difficult to access Euregion Praděd in the Jeseníky Mountains (Pásztó *et al.*, 2019).

If I were to summarize the above provisional findings, I believe that from a long-term historical perspective, the approach of Poland and its authorities and the Polish path in general to the issue of "travel and tourism policies" appears to be more pragmatic and liberal and at the same time more ambitious, at least before 1989 and the fall of the communist regimes. This was done despite (or perhaps thanks to) the fact that Poland was struggling with much greater economic and domestic political problems than Czechoslovakia. The Czechoslovak model before 1989 was a rather conservative way of governing, through which the top communist elite (allegedly) defended the "collective" interests of the Eastern Bloc countries, but in practice, Soviet interests rather than Czechoslovak interests. After 1989, both countries found themselves on the same imaginary ship in search of a path in the midst of a globalizing world, which they saw mainly in the "return to Europe" and European and Euro-Atlantic integration, with all its implications. Both before and after 1989, travel and tourism (and its prominent actors) can be perceived as clear accelerators and "pillars" of modernization trends and tendencies. At the same time, from a historical-anthropological perspective, I also see them as an opportunity for mutual understanding, a tool for preventing the emergence of overly negatively constructed prejudices, and a way of potentially preventing mutual animosities and disputes.

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Market Behavior Within the Czechoslovak Command Economy – Fine Arts as a Specific Realm of Entrepreneurship

Abstract

One of the consequences of political and social changes after 1948 in Czechoslovakia was the transition to a centrally controlled economy and the abandonment of market principles, including the liquidation of private business, which affected all sectors of the economy and all levels of business from large companies and corporations to individual self-employed persons. Nevertheless, private businesses did not completely disappear in Czechoslovakia, and they persisted in certain forms until 1989. The paper focuses on how private entrepreneurship took shape within the command economy in a specific branch of visual arts using oral history interviews with men and women artists as a primary resource. The main research focus is on the interplay between looking for economic freedom on the one hand and striving for freedom of artistic creation and expression. The artists' possibility of private entrepreneurship is an important variable that interferes with this analysis. A final part of the article offers an insight into the position of freelance artists upon entering the market economy era after 1989.

Keywords: Czechoslovakia, freedom, graphic design, oral history, visual art

Zachowania rynkowe w czechosłowackiej gospodarce nakazowej – sztuki piękne jako specyficzna sfera przedsiębiorczości

Abstrakt

Jednym ze skutków zmian politycznych i społecznych po 1948 roku w Czechosłowacji było przejście do gospodarki centralnie sterowanej i odejście od zasad wolnorynkowych, w tym likwidacja prywatnej działalności gospodarczej. Proces ten objął wszystkie sektory gospodarki oraz wszystkie poziomy działalności – od wielkich przedsiębiorstw po

osoby prowadzące jednoosobową działalność. Mimo to prywatna inicjatywa nie zanikła całkowicie i przetrwała w pewnych formach aż do 1989 roku. Artykuł koncentruje się na tym, w jaki sposób prywatna przedsiębiorczość rozwijała się w ramach gospodarki nakazowej w specyficznej dziedzinie sztuk wizualnych, opierając się na wywiadach historii mówionej z artystkami i artystami jako głównym źródle badawczym. Głównym przedmiotem analizy jest napięcie między dążeniem do wolności ekonomicznej a potrzebą swobody twórczej i artystycznej ekspresji. Możliwość prowadzenia działalności na zasadach prywatnych stanowi istotną zmienną, która wpływa na analizowane zjawiska. W końcowej części artykułu omówiono sytuację wolnych artystów po 1989 roku, kiedy wkroczyli oni w realia gospodarki rynkowej.

Słowa kluczowe: Czechosłowacja, wolność, projektowanie graficzne, historia mówiona, sztuki wizualne

Introduction: art production as a way of doing business in the state socialism era

One of the consequences of political and social changes after the 1948 communist coup d'etat in Czechoslovakia was the transition to a command economy and the abandonment of market principles, including the liquidation of private entrepreneurs. The scale of the liquidation was incomparable with other countries of the former Soviet bloc (except for the Soviet Union itself) – it affected all sectors of the economy and all levels of business, from large companies and corporations to individual self-employed persons. Nevertheless, private business did not completely disappear in Czechoslovakia; until the society transitioned to a market economy after 1989, it "survived" both in the unofficial and official (legal and illegal) forms.[1] As for official opportunities to run a private business, there were three main groups of people involved: a) private farmers; b) people authorized by a National Committee's permission for individual services providing (Rameš, 2023, p. 208);[2] c) artists, a specific group of people who could also work independently and employ themselves.

[1] The unofficial "entrepreneurship" included a wide range of incomes from various activities, be they moonlighting jobs, overcharging or cheating consumers, smuggling with desired goods or foreign currencies, prostitution, briberies, etc.

[2] Still, these groups included only a tiny part of the population: in the 1980s (there are no relevant statistics for the previous decades), there „were roughly 9000 people working as individual providers in 1980" and 86 750 in 1989; as for private farmers, the trend was declining, from 14 851 in 1980 to 4204 in 1989 (Rameš, 2023, pp. 215–216).

The proposed study focuses precisely on the group of (visual) artists. From a quantitative point of view, this rather specific category represented a group of entrepreneurs comparable to other people doing their own business (partly due to the small representation of private entrepreneurs in society in general). At the same time, analysis of visual artists' business activities enables to display illustratively possibilities and limits of private entrepreneurship in Czechoslovakia during the period of command economy/state socialism. The category is also interesting because another variable intervenes there – the need for freedom as an integral part of artistic expression on the one hand and an inevitable suppression of freedom by the authoritarian regime on the other hand. Because of this, the issue of freedom is one of the central axis of the study, expressed by the questions: How were the two opposite needs – the artist's freedom and the ruling regime's control reflected in the artists' work and their attempt to private business? Could entrepreneurship in this branch bring freedom/a sort of freedom to artists? How were these people prepared to enter the transformation/market period because of their previous experience with entrepreneurship?

The topic is developed in the form of a case study based on in-depth oral history interviews with ten men and six women who are (or were) involved in visual arts in some way – three painters and one woman-painter, four graphic artists, two photographers, and three women-photographers, one sculptor, one woman-restorer; and a woman-graphic artist who works in marketing. The group of narrators comprises two broad age categories: six born between 1935 and 1949 and ten younger ones born between 1951 and 1960. All of them were involved and created in their field both during the so-called normalization[3] and after 1989, in a democratic market environment.

The text does not deal with the problematic of artistic quality, socialist aesthetics, its promotion or distortion; it is not a contribution to the history of art.[4] The present study focuses on issues related to the functioning of the

[3] The period after the invasion of Warsaw Pact troops in Czechoslovakia in August 1968, characterized by the suppression of previous reform efforts, this era ended only with the Velvet Revolution in 1989.

[4] In addition to encyclopaedic publications on the artistic production in the period under review (especially applied graphics relevant to this text), it is possible to mention, for example, works from recent years: Ryška, Šrámek (2016); Táborský, Česálková (2022), or overview work by Bell (2019).

artistic sphere, as well as the living and working conditions of visual artists in the period of state socialism. This is a topic that is still relatively marginal in Czech historiography; partial contributions to knowledge appear mainly in qualifying university theses. The study opens with a description of the institutional framework of artistic production in Czechoslovakia before 1989. Then, attention is paid to the mechanisms of private entrepreneurship in the artistic sphere, looking at visual artists as entrepreneurs.

The institutional framework of business activities in the art world before 1989

As a part of the communist coup d'etat in Czechoslovakia in 1948, communist rule took control of the sphere of art. In the case of fine arts, the Action Committee of Czech Artists was established on the day after the communist coup, February 26, 1948). This Committee was responsible for making decisions on conceptual and organizational matters of artistic life. Besides, it recognized the Union of Czechoslovak Fine Artists as the only legitimate organization of artists, which concentrated all the functions of former art organizations or associations, now liquidated (Ševčík, Morganová, Dušková, 2001, p. 432). The new Union was established to control the art production and was entrusted with the "purge" of the scene. That means its task was to define personalities in the branch as well as artistic values that the communist/authoritarian regime needed to exclude from cultural life (Knapík, 1993, p. 19). In 1956, during a period of moderate political easing, this central Union was divided into the Union of Czechoslovak Visual Artists and the Union of Czechoslovak Architects, both of which were to be built based on selectivity (Ševčík, Morganová, Dušková, 2001, p. 435). The issue of selectivity, of course, included not only artistic quality but also political aspects, political loyalty, and acceptance by the communist regime.

Following the federal organization of the republic in 1969, this central Czechoslovak union was divided into the republican ones, the Czech/Slovak unions. Again, this process was also characterized by pressure for political "purification" from the earlier reform ideas of the democratization period of the late 1960s and the so-called Prague Spring (similarly to how this "normalization" took place in all other spheres of society). The new Union of Czech

Visual Artists (1970) was strictly selective based on political considerations – only 8% of former (that of the 1960s) union members became members of this new organization. In 1978, there was founded also a federal organization, the Union of Czechoslovak Visual Artists, which mainly ensured the agenda of foreign relations, membership in international organizations, etc.[5]

However, what was important about this reorganization was the establishment of the Czech Fine Arts Fund, which was the monopoly organization for the sale of artworks and related services (Ševčík *et al.*, 2001, p. 434). The unions (the Union of Czechoslovak/Czech Visual Artists together with the Union of Architects) controlled the Fund through their members by proposing the management of the Fund (the Committee) and by staffing the later developing system of art committees (Brůža, 2021). The Fund had an important role in connection with the procurement of contracts for artworks, which it then distributed to individual artists, and especially with the invoicing of these contracts (an artist could also obtain a contract himself/herself by negotiating with a partner, on the basis of previous cooperation, etc., but invoicing had to be done through the Fund). Thus, membership in the Fund was a condition for being able to create independently and to collect money for the artwork.[6] Artists were included in the Czech Fine Arts Fund's register either "automatically" after graduating from the relevant art college or after an assessment of their professional competence by the Union of Czech Visual Artists for those who did not have a university degree (typically, a graduate of an art high school, often specialized in the field of applied graphics (Ševčík *et al.*, 2001, p. 459).

Apart from registration in the Fund (based on one's artistic values and also his/her political "reliability"), a fundamental mechanism of control and artistic censorship was the establishment of so-called art committees by

[5] After 1989, the successor organization of the Czech Union of Visual Artists became the Union of Visual Artists (since 1994, the Union of Visual Artists of the Czech Republic).

[6] This practice has changed over time: in 1979–1981, it was an obligation forced on the basis of a government decree. Later, art committees also could accept works of unregistered artists for sale. However, the contemporary sources indicate that most committees were unaware of this possibility or were not well acquainted with it (Mikeš, 2013, p. 34; the author's statements are based on primary documents from the National Archives).

a 1961 regulation of the Ministry of Education and Culture (abolished in 1992). This regulation stated, among other things, that the art committees would ensure high ideological and artistic evaluation criteria in the purchase, sale, and commissioning of works of art. Therefore, according to the regulation in question, the committees were to include representatives of the Union of Czech/Czechoslovak Visual Artists, possibly representatives of other artistic institutions, and, finally, representatives of the relevant bodies of the Communist Party of Czechoslovakia, Trade Union, and Socialist Youth Union (Decree No. 149/1961 Coll). Thus, the art committees consisted not only of expert artists but also of the relevant party workers who had the role of censors. The organization of artists in one of the Unions, together with the mechanisms of the Czech Fine Arts Fund (here, above all, the possibility of invoicing and clearing artwork contracts), together ensured almost perfect control of what was or was not possible to present publicly.[7]

What is very important concerning the topic of this article, the fact that registration in the Fund (or membership of the Union) was a prerequisite for artists to be able to work without permanent employment; therefore he/she was not exposed to the risk of punishment because of so-called criminal offense of parasitism punishable up to three years of imprisonment (Act No. 58/1965 Coll.). These rules applied not only to visual artists but also to art craftsmen, art restoration specialists, or interior architects. The income of these self-employed artists was taxed with a moderate tax on literary and artistic activities, and another advantage was the low rent on non-residential premises – ateliers, where they could also live permanently, as remembered, for example, one of the graphic artists (Interview with Zbyněk Hraba).

However, providing all these benefits was highly selective, with the political evaluation of the registrant being decisive. Artists with different political views than those accepted by the ruling communist power could create only in their private space, often at the risk of various sanctions from the ruling authorities.[8] The number of registered artists (i.e., private entrepreneurs of

[7] However, the motives for this control were strictly ideological or censorial. In some cases, works were not approved in an effort to maintain a certain artistic standard for all publicly published works.

[8] The same aspects "came into play" even before the start of the artistic activity itself, because even the entry to the art school (whether high school or university) was

a = kind) from the 1970s to 1990 was roughly around eight thousand (complete data are not available; the conclusion follows the authors: Brůža (2021), Mikeš (2013, p. 75). How do they perceive, evaluate, and remember this exceptional opportunity to run a private business (to work for oneself) in the context of the socialist times?

Freedom or money? Freelance artists before the year 1989

Even when artists talk about the work "made to order," freedom of creation, of artistic expression is still an important motif in all narratives. Compared to graphic designers, generally artists in permanent employment, these freelancers were flexible in time, unrestricted by the rules of running a socialist enterprise. At the same time, however, they had to get contracts themselves. Was it difficult? Most of them agree that they did not experience any problems, and they were usually able to find a reasonably good job, mainly due to the quality of their work:

> If you have done something and it was considered to be of good quality, it gets around quickly. So, I had some pretty good contracts. (…) I took more or less everything at first, and then I really started to pick and choose a bit (Interview with Miroslav Jiránek).

At the same time, these people mention the low cost of living and the satisfactory level of income achieved:

> Of course, it was a better business than today because illustrating a book with, say, thirty illustrations meant that you had enough for half a year because it was paid relatively well. So, those of us who had some orders could almost feel like illicit money changers,[9] suddenly having a pile of money, but of course not

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not only a question of talent, but also of ideological aspects – of the candidate and his/her family; and favouritism was/may have been important as well. "The reality of state socialism forced people to find ways to circumvent the devastating bureaucracy and the restrictive censorship system. This made nepotism and favouritism an acceptable form of behaviour (Svašek, 2004, p. 82).

[9] So-called *vekslák*, a person engaged in the illegal purchase and sale of foreign currencies or vouchers, which could be used to purchase foreign goods in Tuzex stores (domestic stores with valuable foreign goods).

> everyone was successful. But from this point of view, I can't complain, we somehow managed to survive quite well. My wife also did some illustrations at the time, so we used to make decent money at times, and we didn't feel like we were struggling. Moreover, the rent was ridiculous (Interview with Miroslav Jiránek).

In the above-quoted excerpt from the interview, the price for the work is related to the cost of living; as a result, the artist does not complain about the money; on the contrary, he evaluates his earnings as above standard.[10] The reference to the fact that in the past, it was possible to make a relatively good living from visual art (including applied art, i.e., creating posters, designing labels, graphic design of books, photographs for the media, etc.) also appears in other interviews. Weaker competition may have played a role here, especially in some fields, since a significant part of artists worked in permanent employment that corresponded to their qualifications. State enterprises had their own promotional (marketing) departments, printing houses had their own graphic departments, etc., where employment was more secure than entrepreneurship (conditioned by membership in the Fund or by obtaining a contract and defending its implementation before an art committee). Excessive jealousy or competition is not mentioned, even among freelance artists (for example, in the interview with Josef Houdek). However, the topic of competition does, in some cases, and spontaneously, appear in narratives about the process of gaining membership in the Union of Czechoslovak/Czech Visual Artists or the Czech Fund of Visual Arts (for example, Interview with Marie Zábranská).

There is one more interesting moment in the preceding excerpt, when the painter while assessing his income, does not consider the financial support for a large part of the art committees, another characteristic feature of the economic mechanism of the period of state socialism. A typical example is providing financial support for publishing books, often abundant with illustrations, publishing them in large editions, with emphasis on their graphic design (we are not talking here about the artistic level of the published literature, censorship, banned titles/authors, etc.), with the aim to "cultivate" the socialist citizen.

[10] For example, a third of fine artists earned more than twice the average annual salary in what was then Czechoslovakia (Mikeš, 2013, p. 35).

The last part of the excerpt, the subjective assessment of earnings, also deserves attention. Earnings may have been above average, but they certainly did not reach what the illicit moneychangers (*veksláci*) of the time had. Interesting here is the parallel offered in general: on the other hand, art (the painter is talking here) is supposed to be something intellectually/culturally higher than the usual schmoozing western currencies (which, as noted above, falls into the category of unofficial private business). However, the *vekslák* is taken as a reference point, illustrating the warped value system of state socialism. At the same time, this overestimation of earnings can also be read in terms of the standard of living afforded to the artist. It remains to add that the topic of sufficient earnings is only a topic of the interviews with male artists, which also reflects the undervalued role of women in the visual arts, including the possibility of achieving certain positions – on art committees, as teachers at universities, in the possibility of exhibiting, as freelancers, etc. (for example, Placáková, Skopalová, 2020).

So, although private artists could earn even above-standard income, they were also exposed to considerable uncertainty – a competitive environment (although not as predatory as in market economies) and the constant risk that the art committees would not approve the final work. That is why another strategy for circumventing the aforementioned work obligation given by the law and maintaining creative freedom is emerging among visual artists – staying at home to take care of children. Of the ten narrators, two chose this type of family arrangement. This is not a quantitative representative survey, but even this figure indicates that artists chose this strategy more often than the majority of the population. At the same time, the profession allowed them to do so (it is difficult to imagine a similar arrangement for actors, for example). These men like to remember the years spent with children:

> I was at home with my daughter; of course, she went to kindergarten in the morning; in the meantime, I ran around the editorial office [he made cartoons for newspapers/magazines], and then after lunch, I came to the kindergarten, and I could have her at home. Thus, I could play with her, tell fairy tales, and do puppet shows for her. (…) That was wonderful. I could actually wash diapers, feed her, and cook porridge from an early age. I could do all that, and that's really wonderful; men can really envy women for doing that work (Interview with Karel Benetka).

This somewhat idealized picture is based primarily on the fact that men were only involved in childcare, not in the household. Thus, unlike women, they did not experience the burden of the so-called double burden – when women took an active role in both the public sphere of work and the private sphere of domestic work. For comparison, the memory of a woman who only gained more time for personal development and her work when her son grew up:

> I cannot ever understand how I did it. Every day, I drove my son to kindergarten, went to work, picked him up from daycare, stopped by my mom's house to help her, and came home. And here's another job. (…) It wasn't until my son started first grade that I suddenly had the time and started to focus on photography a lot more (Interview with Petra Skoupilová).

Overall, this part of the personal memoirs can be summarized as being full of reflections on the difficulties of practicing the art profession before 1989, under the perimeter of state socialism, struggling with the demands of art committees, especially those of an ideological nature, and trying to maintain as much creative freedom as possible. On the other hand, all artists who got permission to create, either employed in the state enterprise or as freelancers, whose work was not banned by the ruling authorities, did not mention the issue of financial insecurity. And how do their careers change after the democratization of society and the transition to a market economy?

Entry of artists into the real market environment after 1989

The collapse of all restrictions on creative (and entrepreneurial) freedom and activity is the most important change that 1989, as well as related political, social, and economic changes, brought to narrators. The newly acquired freedom is an unquestionable value that the narrators, both men and women artists, welcome; however, they mention it mainly in terms of their whole lives, not only in the sphere of work or artistic activity. They stress, for example, the freedom to travel, including the possibility to know more about the work of foreign artists, or to presenting their own work abroad.[11] Since most

[11] As sculptor Aleš Veselý mentioned, if the works of Czech/Czechoslovak artists did not reach abroad, there was a feeling abroad that there was no quality art scene in Czechoslovakia (Interview with Aleš Veselý).

of the narrators were already used to working as freelancers (to a greater or lesser extent) from the time before 1989, some of them almost immediately started their own businesses, and some of them were successful. However, a certain naivety is also mentioned:

> So they [the narrator's current employer] offered me the opportunity to rent space right in the factory [it was a print house]. And they said that they would give me some work, which I, in my boundless naivety and stupidity, refused. Well, I figured the customers would flock anyway. So, I rented a fairly generous space, had the door painted red to show how free I was, and then just sat around waiting for customers. And when the wait went on a bit too long, and the first rent payment was coming due, I got nervous after all and realized that the job wasn't going to be that good. Fortunately, someone always took pity on me and gave me a job because, after all, I had enough friends in various positions who still decided who could handle the graphic design, and they knew that I was doing a pretty good job and that my prices were not excessive overdoing (Interview with Petr Palma).

Implicit in this excerpt from the interview are two very important dimensions of working life in the visual arts that everyone had to deal with somehow after 1989 – first, the extent (often inadequate) of one's abilities to find contracts, and second, and this is essential, the newly emerging enormous competition in the field. Both contemporary and newly founded art schools began churning out new graduates every year; moreover, suddenly, even amateurs could create (and get contracts) – precisely because the earlier restrictions had fallen (censorship was abolished, restrictions on "politically unreliable" artists were lifted, the so-called artistic committees were abolished).

Then, the narrators come to the conclusion that even today, they cannot be completely free precisely because of the need to cope with market pressures and overwhelming competition. At the same time, they reflect on the negative consequences of the market mechanisms – low quality of the work done, insufficient artistic and craft level of artworks (this is especially accentuated in connection with the creation of applied art – posters, advertisements, graphic design of books, label designs, etc.).

> And then there was just a boom of all sorts of losers who stole graphic programs, got computers, and started to do their own "art" on them, and nobody restricted them in anything. So, it showed up terribly, from shop signs to flyers, it was obvious on posters, so it was a bit of a shock (Interview with Petr Palma).

Furthermore, the question of money becomes crucial. Money appears as an obstacle if an artist wants to exhibit his or her work publicly (whereas in the past, someone had to authorize to get permission; today, money matters; money is a measure of success).

> It's not enough to know something, you have to know how to sell it, how to find those contracts and jobs; (…) it's much more important in that field to know how to communicate, to know how to get that job, to know how to deal with people, to have a wide range of friends in that field, than it is to do that job, to create something (Interview with Zbyněk Hraba).

Thus, one constraint (the influence of the authoritarian regime) replaces another constraint, the market, money. One of the older generation of artists adds: "The Party functionaries were jerks. Nevertheless, they needed to ban something, and I needed them not to interfere with my work. So, I made a white horse that they should have banned, and that was it. That doesn't apply to the people with money" (Krátká, 2008, p. 25, interview with Radomír Postl, graphic artist).

Completion: economic security vs. artistic freedom

This brings us to the initial questions, one of which related precisely to the readiness of freelance artists (and their potential advantages) to enter the market economy. The interview findings, like the life experience of the narrator, quoted above point to a certain naivety in entering a free competition environment. This feeling is experienced both in terms of competition and, in some cases, with regard to the impact on the quality of artistic production, especially that which is mass-consumed (applied graphics).

Besides, the interviews confirm that in the past, the possibility of entrepreneurship brought a sense of exclusivity – it was a confirmation of one's artistic qualities, and at the same time, it placed the freelance artist in a status category of those who had certain advantages over the majority society – precisely because they "could" do business. In principle, nevertheless, they could make a living as artists even if they failed in private entrepreneurship (it is necessary to keep in mind, however, that these conclusions concern visual artists whose work and activity in public space was not prohibited by the regime). Thus, being able to do business in a command economy environ-

ment is now seen as an achievement of freedom; in fact, it was more about distinguishing oneself from the majority population by a certain social status and way of life. Artistic freedom has consistently been achieved primarily outside the space of paid work, whether in an employment relationship or as a freelancer, based on contract work.

Concerning one of this study's central axis, the possible dilemma between the need for artist freedom and the ruling communist regime's control, freedom in art expression is indeed crucial and highly valued, something that all artists strive for.

In the past, however, it was not directly tied to the possibility of entrepreneurship. Artists found a space for free, free creation, for example, by going to the space of the family or by staying in a permanent job with a permanent income and having free creation as a hobby. The important thing was that they always solved the question of income satisfactorily and were not exposed to the uncertainty of whether the work in the field would support them. In principle, they thus implicitly positively evaluated the centralized directive system, against which they defined themselves as private entrepreneurs on the one hand, but on the other hand, minimized their worries about the sufficiency of commissions, hence competition, income, and securing the necessities of life. The creation itself remains constant in the life and professional stories of visual artists because one wants to create because it fulfils them.

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Between Memory and Forgetting. The Cult of Avram Iancu Through the Public Forum Monuments in Bihor County[1]

Abstract

The study examines the enduring legacy of Avram Iancu, a prominent figure in Romanian history, through the public monuments dedicated to his memory in Bihor County, Romania. Avram Iancu, renowned as the leader of the 1848–1849 Transylvanian revolution and a symbol of Romanian national identity, has been immortalized through a variety of monuments constructed from the late 19th century to the present day. The research adopts a multidisciplinary approach, integrating historical analysis, field investigations, and sociological surveys to explore the historical, political, and cultural contexts surrounding the creation of these monuments. The findings reveal that the monuments, concentrated primarily in urban areas, serve as focal points for preserving collective memory and promoting national pride. These public commemorations reflect the sociopolitical dynamics of their respective eras, from the Austro-Hungarian suppression of Romanian national identity to the nationalist tendencies of the communist regime and the democratic resurgence post--1989. The study highlights the instrumental role played by local intellectuals and organizations in commissioning and sustaining these memorials. Ultimately, the

[1] A variant of this research was published in Romanian language in the volume of the International History Conference "Acta Historica Civitatis Lugosiensis". Lugoj, December 8–10, 2023, with the title *Istorie locală, și istorie națională în context european (Lucrările Conferinței Internaționale de Istorie "Acta Historica Civitatis Lugosisnsis", Lugoj, 8–10 decembrie 2023)*, coord. S. Șipoș, L. Ardelean, C. Patca, C.-T. Tufan, Eurospampa, Timișoara, University of Oradea. Oradea, 2024.

monuments of Avram Iancu in Bihor County exemplify the complex interplay between historical memory, national identity, and political ideology in shaping public spaces and cultural narratives.

Keywords: national identity, historical memory, public space symbolism, cultural identity in monuments, urban memorials

Między pamięcią a zapomnieniem. Kult Avrama Iancu w pomnikach publicznych w okręgu Bihor

Abstrakt

Niniejsze opracowanie analizuje trwałe dziedzictwo Avrama Iancu – jednej z kluczowych postaci w historii Rumunii – poprzez pomniki poświęcone jego pamięci na terenie okręgu Bihor. Iancu, znany jako przywódca rewolucji transylwańskiej z lat 1848–1849 i symbol rumuńskiej tożsamości narodowej, został upamiętniony za pomocą różnorodnych monumentów wznoszonych od końca XIX wieku po czasy współczesne. Badanie opiera się na podejściu interdyscyplinarnym, łączącym analizę historyczną, badania terenowe i sondaże socjologiczne, aby ukazać konteksty historyczne, polityczne i kulturowe towarzyszące powstawaniu tych pomników. Wyniki wskazują, że monumenty – skoncentrowane głównie w przestrzeniach miejskich – stanowią ośrodki podtrzymywania pamięci zbiorowej oraz promocji dumy narodowej. Upamiętnienia te odzwierciedlają zmieniające się realia społeczno-polityczne: od tłumienia rumuńskiej tożsamości narodowej w czasach monarchii austro-węgierskiej, przez nacjonalistyczne tendencje okresu komunistycznego, po demokratyczne odrodzenie po 1989 roku. W badaniu podkreślono kluczową rolę lokalnych intelektualistów i organizacji społecznych w inicjowaniu oraz podtrzymywaniu funkcji tych miejsc pamięci. Pomniki Avrama Iancu w okręgu Bihor ukazują złożone powiązania między pamięcią historyczną, tożsamością narodową a ideologią polityczną w kształtowaniu przestrzeni publicznej i narracji kulturowych.

Słowa kluczowe: tożsamość narodowa, pamięć historyczna, symbolika przestrzeni publicznej, pomniki i tożsamość kulturowa, miejskie miejsca pamięci

Introduction: Avram Iancu – the hero of the Romanians

Both Romanian and foreign historiography have contributed to shaping the complex image of Avram Iancu. Prominent figures in Romanian historiography, such as Silviu Dragomir, Ștefan Pascu, Pompiliu Teodor, Liviu Maior, and Gelu Neamțu, as well as foreign scholars like Keith Hitchins and Paul Michel-

son, have significantly advanced the understanding of Avram Iancu's life and work through their research. They have redefined the exceptional personality of this fighter for all Romanians and have substantially enriched the biography of the Crăișor of the Mountains.

At the age of 24, Avram Iancu was among the leaders of the 1848–1849 Revolution in Transylvania, and by the age of 25, he had become the master of the Apuseni Mountains, which he had transformed into a veritable Romanian principality, both militarily and politically (Pop, 2024, p. 5). Avram Iancu's figure took shape with clarity during the 1848 revolution, especially at its key moments. Initially, he was often lost in the noisy and disorganized masses of young people in the major centers of the province. However, as the Romanians, following the example of the Hungarians and Saxons and encouraged by the revolutionaries from Wallachia, organized the assemblies of April and May in Blaj, Avram Iancu emerged as a true leader. His youthful intransigence often put him at odds with the compromise proposals of some of the more experienced leaders, which brought him closer to the people, who proclaimed him their leader (Șipoș, 2012, pp. 382–383). Honesty, courage, wisdom, combined with a pleasant physical appearance, made Iancu beloved and respected by the troops of the Moți, as well as by the tribunes and prefects from the mountains. Nevertheless, he was not exempt from serious accusations. Some "well-meaning" contemporaries, especially Hungarians, as well as numerous officers in the Austrian army, accused him of ordering the destruction of Hungarian villages during military operations, contributing to the looting of imperial offices in the mountains, failing to collaborate sufficiently with the imperial army, and, most seriously, engaging in negotiations with Hungarian revolutionaries and with Romanians from Wallachia. For the Moți and the common people, Iancu remained, until his death, the *Craiul munților* (King of the Mountains), a true legendary figure. From the beginning of the revolutionary action until the conclusion of the military operations, Iancu was the mastermind behind them (Șipoș, 2012, p. 462). Avram Iancu impressed his contemporaries and continues to impress today. The spirit of Iancu still wanders through the Apuseni Mountains. If you travel through the Land of the Moți, people will still speak of Avrămuț as if he passed through there just yesterday. People take pride in having ancestors in their families who were captains in his army or who knew the *Crăișorul Munților* (Bolovan, Bolovan, 2024, p. 17).

The historian Pompiliu Teodor aptly noted the heroic figure of Avram Iancu and the cult that developed around him: "As early as the late autumn of 1848, when the flames of the Revolution engulfed the country, Avram Iancu was the great and unparalleled personality, undoubtedly the hero of his Moți people, the man who embodied more than anyone else the aspirations of the nation. From a leader of the Moți raised to battle, he quickly became, as traditional, petition-based methods were exhausted, the hero of the nation, the legendary figure symbolizing the aspirations of a society in the process of asserting itself. A cult of Iancu was established from that time, a legend perpetuated through the ages, to which the nation's justifications continually associate new values" (Pompiliu, 1972, p. 5). Silviu Dragomir (1965; 2024) contributed the most to understanding the personality of the Crăișor, with his monograph dedicated to Avram Iancu, published in 1965 and recently reissued. Thus, the Transylvanian historian valued Iancu as "the most prominent representative of the Transylvanian Romanian Revolution and a true hero of the people, whose virtues have made him shine through the centuries as a living example for the descendants of patriots and as a bright source of national pride" (Dragomir, 2024, p. 301). Ioan-Aurel Pop emphasized that "Avram Iancu remains, for Romanians and Europeans, a model of an action-oriented man striving for emancipation, for freedom, unity, and brotherhood. He has long entered history, legend, and folklore…" (Pop, 2024, p. 9).

An important role in shaping Avram Iancu's image as a hero was played not only by his military deeds but also by his involvement in the political decisions made by the Romanian elite in 1848 and the early part of 1849, as well as the tragic fate he endured until his death in 1872. His figure as a tragic hero took shape just a few years after the revolution, as reflected in the correspondence between Alexandru Papiu Ilarian, Simion Bărnuțiu, and August Treboniu Laurian from 1855 (Pervain, Chindriș, 1972). No one understood better than Alexandru Papiu Ilarian that Iancu's refusals to be decorated and to accept high offices were acts of resistance in the fight for the rights of the Moți, actions coming from someone who sought nothing for himself as long as his comrades were forgotten and despised.

The heroic figure of Avram Iancu has been reflected over time in stories, legends, memories, and folk songs, all of which have been studied through

the lens of oral history. The narratives about Avram Iancu portray the truth and serve as crucial testimonies regarding the inner life of ordinary people. These stories often blend the real with the fantastic and the miraculous, particularly as time passes, highlighting the storyteller's talent in crafting dialogue, atmosphere, and details. Following their leader (Avram Iancu), the people transformed suffering into fiery anger, tears into calls to battle, patience into revolt, and the fire in the hearth into a revolutionary flame that spread across the mountains and valleys (Dudaș, 1998, p. 7). Folk verses, and especially songs, provide the clearest evidence of the beneficial influence that Iancu, much like Horea before him, had on the people, as well as the symbolic force with which he embodied the aspirations of the masses (Dudaș, 1998, p. 280).

Methodological aspects

Law no. 223 of July 14, 2023, issued by the Parliament of Romania and published in the Official Gazette no. 651 of July 17, 2023, designated the year 2024 as the "Year of Avram Iancu" in celebration of the 200th anniversary of the birth of the revolutionary Avram Iancu (OMF, 2023). In this context, the aim of the present study is to present several introductory aspects related to the cult of Avram Iancu, as manifested through public monuments in Bihor County. The analysis and interpretation of these monuments will consider the following aspects: the location of the monument (rural/urban) and its placement, the type of monument, the year of creation and historical context, the construction materials used, the artist, and the financier or commissioner. To this end, we will employ a sociological survey using the questionnaire method, as well as field investigations conducted to study the monuments. At the same time, we will use a critical analysis of the main documentary sources related to the subject and attempt to examine the role and significance of the monuments in preserving the memory of Avram Iancu in the consciousness of the Romanian people. In this regard, we will consider both published sources (contemporary press, general and specialized bibliographies) and unpublished sources (from national or local archives), as well as works on the theory of history and research methodology, following the approach initiated by Pierre Nora (1984) to understand the role of monuments

in preserving historical memory and in the instrumentalization of the past to achieve political objectives.

Efforts to create public monuments dedicated to Avram Iancu in the Romanian space – general aspects

According to the Ministry of Culture, Public Monuments are immovable assets, works of plastic art, monumental art, non-utilitarian constructions or arrangements, with a decorative, commemorative, and signaling character, located in public spaces, within a protected area, on land that is part of the public or private domain of the state or of administrative-territorial units (*Public Monuments*). The placement of public monuments is carried out in compliance with the applicable regulations concerning urban planning and the authorization of construction works, as well as with the approval of the artistic concept for the public monument, issued by the Ministry of Culture, based on an analysis conducted by the National Commission for Public Monuments. The Commission consists of 11 members, serving a 2-year mandate, and includes scientific researchers, visual artists, art critics, academicians, and members of specialized institutions (*Public Monuments*).

At the same time, it is worth clarifying the expression "public space," which has been the subject of numerous debates and opinions. The simplest definition of public spaces is that they are places in a city or village that belong to all its inhabitants, where anyone has the right to use them, and in which, ideally, people can gather without having to pay an entrance fee. Public spaces are also considered "public domains," meaning territories owned by the administrative authorities of a locality, which can be used freely by anyone (Tîrcă, 2001).

Lastly, it is essential for our research to understand and define the role of public monuments, in this case, the monuments of Avram Iancu, in preserving historical memory for the Romanians of Transylvania and their role during a difficult period in our nation's history.

The idea of creating a monument dedicated to Avram Iancu emerged immediately after the death of the "*Crăișor al Munților*" (Prince of the Mountains) on September 10, 1872. In issue 37 of *Familia* magazine, pub-

lished on September 10, 1872, Iosif Vulcan called for a mass contribution to the creation of a funeral monument that would be representative of the entire Romanian nation (Familia, 37/1872, p. 440). Whether as a consequence of this appeal or not, the Romanian deputies in the Diet of Pest, Sigismund Borlea and Dr. Iosif Hodăgiu, continued the effort to raise funds. This initiative was praised in issue 47 of *Familia* magazine, published on December 1, 1872 (Familia, 47/1872, p. 56). Efforts to erect a monument to Avram Iancu intensified towards the end of the 19th century. Ioan Russu Șirianu, a journalist at the *Tribuna* newspaper in Sibiu, launched a press campaign in 1894, initially in *Tribuna*, and later in *Foaia poporului*, urging people to contribute "as much as they could" (Tribuna [Sibiu] 78/1894). His idea was subsequently taken up and supported by the National Romanian Party of Transylvania and Hungary, as well as by ASTRA. Several actions followed to collect the necessary funds for the project, but all of them failed until the Great Union of 1918. The causes of these failures were primarily linked to the repressive policies of the political authorities of the time, which targeted taxpayers and those collecting the funds. The authorities sought to discourage any efforts that could lead to the realization of the statue, considering the fundraising activities as "public begging," and Iancu was regarded as a "bandit leader" (Poptămaș, 2003, p. 153). Moreover, the Hungarian authorities during the Dualist period attempted to prevent any activity that promoted figures from national history who, through their actions, had shown that Romanians were entitled to political and national rights.

After the realization of Greater Romania on December 1, 1918, the political context shifted, and the idea of creating a public monument dedicated to Avram Iancu took on a new dimension. Romanian intellectuals in Transylvania, especially historians, were concerned with establishing the role and place of Transylvania in Romanian historical life, its distinctiveness from the Hungarian crown, which was sought in the medieval national political organizations that the Transylvanian Romanians had, as well as with writing and promoting national history.

In 1921, a founding committee was established in Cluj to launch an appeal for material support for the creation of a monument dedicated to Avram Iancu. The committee was chaired by Division General Nicolae Petala, with University Professor Ioan Lupaș serving as vice president. The appeal had

a significant impact, triggering a series of actions that raised substantial funds, though not enough to immediately commission the statue. At the beginning of 1923, a competition was announced for the design of an equestrian bronze statue, which was to be placed in front of the National Theatre building and on the square in front of the Orthodox Cathedral (which was still under construction).

In 1922, the ASTRA branch in Deva took action to raise the necessary funds for the creation of a bust that was to be placed in Deva (Teodorescu, 1998, p. 256). In 1924, on the occasion of the centenary of Avram Iancu's birth, ASTRA decided to mark the event with grand public celebrations held in the presence of King Ferdinand, the royal family, and state dignitaries in the Apuseni Mountains: on August 31 in Baia de Criș, Țebea, and Câmpeni; on September 1 in Vidra and Mount Găina; and on September 2 in Cluj (Mager, 2017, p. 210). The celebrations were preceded by memorial services held in all Romanian churches across the country on August 28 (the Feast of the Dormition of the Virgin Mary). In 1923, ASTRA organized the Avram Iancu Museum in the house at Vidra de Sus to highlight the life and activity of the Romanian hero. The museum was inaugurated on September 1, 1924, in the presence of the royal family. Sculptor Dumitru Mățăuanu created two carved marble plaques from Carrara marble and the cross on Mount Găina (Teodorescu, 1998, p. 259). In the presence of the Romanian government, on August 31, 1924, the events at Baia de Criș took place, including the unveiling of the bust of Avram Iancu (located in the town center) and a commemorative plaque (attached to the wall of the house where Avram Iancu passed away). Both monuments were created by sculptor Romul Ladea (Teodorescu, 1998, p. 259). On the last day of the celebrations, the cornerstone of the planned Avram Iancu monument was laid in Cluj. Due to various reasons, the actual construction of the monument was postponed for several decades. Also in 1924, the Society of Heroes' Graves arranged the cemetery in the churchyard at Țebea; the remains of revolutionaries Ioan Buteanu and Simion Groza, as well as the soldiers who died in World War I, were reburied there. On either side of Avram Iancu's grave, two cannons were placed, pointing westward (Mager, 2017, pp. 214–215). Unfortunately, of all the commemorations related to the Revolution, only one remains today: Țebea, the cemetery where Romanians continue to go in mid-September to honor the memory of Avram Iancu (Dragomir, 2024, p. 13).

A significant work was commissioned to sculptor Ioan C. Dimitriu Bârlad for the city of Târgu Mureș. The monument consisted of an equestrian statue and reliefs placed on the sides of the pedestal. The pedestal had a height of 4 meters, while the equestrian statue stood at 3.25 meters. The components of the complex were cast by the V. V. Rășcanu company in Bucharest (Teodorescu, 1998, p. 260). The unveiling ceremony of the Avram Iancu monument in the center of Târgu Mureș took place on May 10, 1930. Subsequent political developments led to a unique fate for this monument. When the Romanian administration withdrew from Northern Transylvania following the Vienna Dictate of 1940, the components of the monument were relocated to Câmpeni, where they were later reassembled and eventually became the symbol of this locality. Since the inhabitants of Câmpeni had previously commissioned a bust of Avram Iancu from sculptor Corneliu Medrea for their town, the bust was later transferred to the locality of Barza in Hunedoara County after the statue from Târgu Mureș was reassembled (Teodorescu, 1998, p. 260).

In 1928, a bust of Avram Iancu was unveiled in the town of Abrud, Alba County. The bust was the work of sculptor Ulbrich and architect Mihălțean (Netea, 1977, p. 17). On November 1, 1931, a carved stone slab was placed on Avram Iancu's grave in Țebea, designed according to the sketches of architect Gh. M. Cantacuzino. Furthermore, on June 10, 1934, the unveiling ceremony of a bust of Avram Iancu took place in Țebea, sculpted by Radu Moga, with the commission being provided by the personnel of the Romanian Railways (Teodorescu, 1998, p. 261).

In 1968, the 120th anniversary of the 1848 Revolution in the Romanian Principalities was celebrated. In this context, the communist authorities organized large-scale events, despite the difficult political circumstances. The death of Stalin encouraged some of the communist leaders in the country to promote a shift away from the internationalist formula and return to national values. Although the change appeared to be particularly difficult, the *nationalist* communist group had public opinion on its side, as well as the support of the majority of intellectuals, who were humiliated and insulted by the anti-Romanian policies promoted by the Stalinist and pro-Soviet communists (Șipoș, 2015, p. 112). Success largely depended on the re-establishment of the national history's natural course, on the condemnation and cessation of

the historiographical falsifications that harmed the Romanian nation (Țugui, 1999, pp. 21–84). It remains to be discussed to what extent the discourse promoted by the communist leaders was sincere. The academician Șerban Papacostea noted, in this new political context, that the struggle between the two communist factions in Romania was fought for the preservation of power, and not so that historians could tell the truth. Consequently, national history became more of a powerful weapon in the hands of the *nationalist* communists for discrediting those aligned with Moscow (Papacostea, 1996, p. 251).

Beginning at the top of the political power structure, the fight for the restoration of historical truth could not be waged without the involvement of historians recognized as authorities in the scientific community (Șipoș, 2015, p. 112). The confrontation proved to be merciless. The group of specialists, including Andrei Oțetea, Constantin Daicoviciu, David Prodan, Ștefan Pascu, V. Cheresteșiu, and Barbu Câmpina, among others—some old illegalists and Marxists by training, others who entered the ranks of official historians due to political changes and a noticeable opportunism across all eras, and who held important positions in political and scientific life – were joined by historians from the interwar generation recently released from communist prisons. The confrontations began with Mihail Roller's textbook, as well as with other works published by historians from the two factions. A fierce battle also took place for positions in research institutes and especially within the Romanian Academy (Țugui, 1999, pp. 20–21).

In this context, in May, the bust of Avram Iancu was unveiled in the town of Avram Iancu, Arad County; the work was created by sculptor Romul Ladea. The same sculptor's works were unveiled in two other locations in the same year: in the town of Avram Iancu (Vidra de Sus) in Alba County and in the town of Huedin in Cluj County. A commission was given to the artist Naum Corcescu for a work to be completed in 1968, destined for the city of Brad, for which he received the Monumental Art Prize awarded by the Union of Fine Artists the following year. In the same year, 1968, the bust of Avram Iancu, carved in stone by sculptor Nicolae Pascu, was unveiled in front of the Avram Iancu High School in Brad (Teodorescu, 1998, p. 262).

Another significant moment for the creation of public monuments dedicated to Avram Iancu occurred around 1972, marking the 100th anniversary of the death of the Crăișor of the Mountains. In Baia de Criș, Hunedoara County, an obelisk dedicated to Avram Iancu was unveiled in 1972. Carved in stone, this monument was the work of artists Emil Mereanu and Florica Ioan. In the town of Hălmagiu, Arad County, the bust of Avram Iancu, carved in white stone and created by sculptor Ion Tolan, was also unveiled in the same year (Teodorescu, 1998, p. 262). In Alba County, in Blaj, on the Field of Liberty, 24 busts were gathered to commemorate the revolutionaries who contributed to the events leading up to, the preparation for, and the execution of the 1848–1849 Revolution. The bust of Avram Iancu was sculpted by Mircea Ștefănescu, and the unveiling ceremony took place on May 17, 1973 (Teodorescu, 1998, p. 262).

The center of Târgu Mureș once again became the host of an imposing monument in 1978. A large equestrian statue depicts Avram Iancu in a leadership pose. The statue, cast in bronze and placed on a stone-clad pedestal, is the work of sculptor Florin Codre. The unveiling of the monument took place on November 12, 1978. Sculptor Mihai Buculei created the composition *Fereastră către dorul Iancului* for the town of Buteni in Arad County. In Timișoara, a bust of Avram Iancu was also created, the work of sculptor Dumitru Pălălău Moldoveanu (Teodorescu, 1998, p. 263).

Monuments dedicated to Avram Iancu were also erected after 1989, following Romania's transition to democracy. Increasingly, monuments honoring the *Crăișorul Munților* were created and installed in various localities across Romania. On May 3, 1991, the bust of Avram Iancu was unveiled in front of the Avram Iancu High School in Cluj-Napoca. The work, carved in white stone, was created by sculptor Alexandru Lupu (Teodorescu, 1998, p. 264). On November 30, 1993, two additional monuments were inaugurated in Brașov and Cluj-Napoca. After many decades of unsuccessful attempts, the unveiling ceremony of the statue of Avram Iancu took place in the square in front of the Orthodox Cathedral in Cluj-Napoca. This event was followed by the installation of other public monuments dedicated to the *Crăișorul Munților* in various localities, including several in Bihor County.

Public monuments dedicated to Avram Iancu in Bihor County

The study of the specialized bibliography (Dragomir, 2024; Teodor, 1972; Bîlea, Șerb, 1972; Maior, 1972; Ranca, Nițu, 1974; Badea, Bodea, 1976; Dudaș, 1998; Dudaș, 2016; Duda 2022; Dudaș, 2024; Țucra, 2000; Faur, 2022; Degău, 2024; Faur, 2024; Cosma, Varga, 2023; Bolovan, 2024) reveals a strong connection between Avram Iancu and the regions of Bihor. The Romanians from these areas were deeply involved in defending and supporting the national cause, primarily showing solidarity with Avram Iancu. In 1934, Andrei Popa from Crișcior (Bihor County) learned from the accounts of the elders that the *moți* used gunpowder from the mining depot in Băița (Dudaș, 1998, p. 204). In a letter sent by Avram Iancu to the Orthodox priest Petru Sabău from Fânațe during the revolution, there is a reference to the Romanians from the Beiuș region, who were called upon to hasten with ten thousand armed men to join the revolution (Faur, 2022, p. 11). A correspondence between Avram Iancu and the jurist Iosif Roman, brother of Professor Alexandru Roman, illustrates the close relationship between the *Crăișor* and the Romanian intellectuals from Bihor (Dudaș, 2022, pp. 26–30). From the Beiuș region also survives one of the last portraits of Avram Iancu, a photograph taken in Beiuș during the final years of his life, in the photographic studio of Szabó Sándor from Beiuș (Degău, 2024, p. 43).

In early February 1850, Avram Iancu traversed the Bihor County on his way to the Imperial Court in Vienna, accompanied by two revolutionaries from the mountains: Prefect Simion Balint and Vice-prefect Maior (Faur, 2024, p. 46). He left Vidra de Sus on February 3, heading toward Hălmagiu and then Beiuș (Faur, 2024, p. 46). During his journey, he made a stop at Vașcău on the night of February 3/4, 1850, at the house of the Circuite Inspection of the Vașcău District (Țucra, 2000, p. 230). In Beiuș, Iancu was hosted at the house of the former politician Dr. Emil Pop, located at 20 Burgundia Mare Street (Dudaș, 2024, pp. 164–165). On February 6, he arrived in Oradea, where "thousands of Hungarian citizens waited for hours to see the uncoronated prince of the mountains, whose arrival had been announced" (Dragomir, 2024, p. 413). Iancu's passage through Oradea, located at the western edge of the Romanian territories, caused an emotional stir and

widespread sympathy, becoming an extraordinary event in the city's history (Faur, 2024, p. 48). Along the way, the Romanian peasants received him everywhere with "spirited manifestations" (Dragomir, 2024, p. 413).

By analyzing the results obtained from the online survey conducted at the level of the administrative-territorial units in Bihor County, as well as the findings from the field investigations, we observe the existence of several public monuments in Bihor County (Table 1).

Table 1. Public monuments dedicated to Avram Iancu in Bihor County

No.	Locality	Monument type	Year of creation	Construction material	Author/ Sculptor	Commissioning party	Location
1	*2*	*3*	*4*	*5*	*6*	*7*	*8*
1.	Avram Iancu	bust	1972	cement	–	Avram Iancu Secondary School No. 1	Avram Iancu Secondary School No. 1 (in front of the school)
2.	Avram Iancu	bust	1974	bronze	Paul Vasilescu	Town Hall of Avram Iancu	Community park
3.	Oradea	bust	1994	bronze	Cornel T. Durgheu	The Bihor County Police Inspectorate, Oradea City Hall, and the "Avram Iancu" Cultural-Patriotic Society, Oradea Branch	Traian Park
4.	Oradea	effigy	1992–1996	bronze	Cornel T. Durgheu	The Bihor County Police Inspectorate	The "A. Iancu" Border Police Agent Training School, Oradea (the institution's museum)
5.	Oradea	effigy	1992–1996	bronze	Cornel T. Durgheu	Romanian Intelligence Service Bihor	Headquarters of the Romanian Intelligence Service Bihor
6.	Vașcău	bust					Vașcău Cultural Center
7.	Ștei	bust	2006	bronze, marble	Daniel Tărăsie	Ștei Town Hall	"Avram Iancu" National College, Ștei
8.	Oradea	bust	1999	marble	Cornel T. Durgheu	Bihor County Police Inspectorate	"Avram Iancu" Border Police Agent Training School Oradea (courtyard)

1	2	3	4	5	6	7	8
9.	Salonta	bust	2001–2002	bronze	Cornel T. Durgheu	Salonta Town Hall	Central Park / Republicii Street
10.	Beiuș	commemorative plaque	2006	marble	Alexandru Crăciun	"Avram Iancu" Cultural-Patriotic Society, Beiuș Branch	20 Burgundia Mare Street
11.	Oradea	bust	2007	plaster	Nicolae Lupu	"A. Iancu" Secondary School Oradea	"Avram Iancu" Secondary School Oradea (hall)
12.	Beiuș	bust	2010	composite material	Alexandru Crăciun	"Avram Iancu" Association Beiuș	Central Park
13.	Marghita	bust	2011	bronze-patinated composite material	Alexandru Crăciun	"Avram Iancu" Cultural-Patriotic Society Marghita, Marghita Town Hall	Central area
14.	Oradea	commemorative plaque	2015–2017	marble	Cornel T. Durgheu	The "Avram Iancu" Cultural-Patriotic Society of Oradea	The Vulturul Negru Building (V. Alecsandri Street)

Source: Authors' own.

The first public monument in Bihor County dedicated to the memory of Avram Iancu was erected in the locality of Avram Iancu, in the commune of the same name, located in the southwestern part of the county. The locality of Avram Iancu, formerly known as Regina Maria until 1947, was founded during the interwar period, when a significant number of miners from the Apuseni Mountains, having received land as part of the agrarian reform, settled in the area (*Comuna Avram Iancu, Bihor*). It is the only rural settlement in Bihor County to have a public monument dedicated to the Crăișor of the Mountains. The bust was purchased in 1972 by the then principal of School No. 1 Avram Iancu, Matei Cărămălău, on the occasion of the inauguration of the new school building. It is made of cement, and initially, its pedestal was wooden. In the summer of 2023, it was moved to the exterior of the school, placed on a marble pedestal, and it remains in this location to the present

day: in front of the new building of School No. 1 Avram Iancu (information obtained from the online questionnaire completed by Mrs. Prof. Lup Eugenia Codruța, director of School No. 1 Avram Iancu, on September 23, 2024). The bust of Avram Iancu in the same locality was sculpted by Paul Vasilescu and unveiled in 1974 (Durgheu, 2006, p. 328). It is made of bronze and is located in the Municipal Park. These are the only public monuments dedicated to Avram Iancu that were erected before 1989.

After the removal of the communist regime in Romania and the return to democracy, several public monuments were erected in Bihor County through the efforts of non-governmental organizations and institutions at the county and local levels. In Oradea, in Traian Park, in front of the County Police Inspectorate building, the unveiling of the bust of Avram Iancu took place on June 24, 1994. The monumental bust was created in bronze by the artist Cornel T. Durgheu. An important role in the creation of this monument was played by the Bihor County Police Inspectorate and its then-commander, Lazăr Cârjan; alongside this institution, a major role was also played by the members of the Bihor branch of the Cultural-Patriotic Society "Avram Iancu," a branch established on June 23, 1994. Repair works to the pedestal of the bust of Avram Iancu were carried out after the approval of the strategy by the Foundation for the Protection of Historical Monuments in Bihor County, in January 2021, according to which the public monuments in Oradea were to be rehabilitated. The project was drafted by architect Cristian Pușcaș (FPHMBhC, 2022, p. 103). The rehabilitation involved replacing the cladding of the pedestal, which was in an advanced state of deterioration, removing the upper step and replacing it with travertine slabs, installing architectural lighting fixtures on the existing pillars, and extending the paving (FPHMBhC, 2022, p. 104).

Two monuments dedicated to Avram Iancu are located within the premises of the "Avram Iancu" Border Police Agent Training School in Oradea: a bust and an effigy. The school was established by the Minister of the Interior's Order no. 04875 of July 31, 1992, and operates in the former building of the Border Guards Training Center. On December 8, 1993, by Minister of the Interior's Order no. 357, the Military School for Border Guard Suboffices was renamed "Avram Iancu," with Avram Iancu becoming the spiritual patron of the school. Over the years, the name of the school underwent several

changes, and since June 1, 2001, it has been known under its current title: *the "Avram Iancu" Border Police Agent Training School in Oradea*. The authorship of the bust is unclear, but it is certain that the effigy was created by the artist Cornel T. Durgheu and later donated to the school in the 1990s by the Bihor County Police Inspectorate. The effigy is made of bronze and is currently displayed inside the institution's small museum. The bust of Avram Iancu is located in front of the school's main building and is made of marble (information obtained from the online questionnaire completed by Mrs. Aura Sima, Deputy Director of the "Avram Iancu" Border Police Agent Training School in Oradea, on September 10, 2024). During the same period in the 1990s, another bronze effigy was created, which is currently located within the premises of the Romanian Intelligence Service Bihor, on Petőfi Sándor Park Street, Oradea. The author of this effigy is also Cornel T. Durgheu (information provided by Cornel T. Durgheu via telephone on October 15, 2024).

The municipality of Salonta is the second largest city in Bihor County, both in terms of population and area, after Oradea. Here, a bust of Avram Iancu is located at a major intersection in the city. The Salonta monument was inaugurated in 2001 and unveiled in a grand ceremony on Romania's National Day in 2002. It is made of bronze, mounted on a marble pedestal, and was created by sculptor Cornel T. Durgheu (Lăptoiu, 2015, p. 50). The initiative for the monument came from the Salonta City Hall and the Orthodox Church.

In Beiuș, a marble plaque with an inscription was created and placed starting in February 2006 on the house of the former politician Dr. Emil Pop, located at 20 Burgundia Mare Street. The plaque commemorates the hospitality extended to Avram Iancu in Beiuș: "On the bread-baking oven of this old house, Avram Iancu often found rest during his travels among the Romanian people of the Criș region" (Degău, 2024, p. 44). The plaque was made by Alexandru Crăciun from marble, at the initiative of Viorel Ianc (Suciu, 2022, p. 109).

In 2006, a bust of Avram Iancu was erected in Ștei, in front of the "Avram Iancu" National College. The bust, made of bronze, was created by the artist Daniel Tărăsie, at the initiative of the leadership of the "Avram Iancu" National College and the Ștei City Hall (information was provided to us via

phone by Mr. Cornel T. Durgheu on 15.10.2024). The bust of Avram Iancu in Vașcău most likely dates from the same period. It is located within the Cultural Center of Vașcău (unfortunately, we were unable to gather clear information about this monument).

In the foyer of the "Avram Iancu" Secondary School in Oradea, there is a bust depicting Avram Iancu, the school's spiritual patron. The work was created by Nicolae Lupu, a full member of the Union of Fine Artists of Romania, in the technique of patinated plaster, in 2007. The dimensions of the bust are 85 x 57 x 30 cm (according to the inscription on the monument). Sculptor Nicolae Lupu was born in Moscow in 1961, after which he moved with his family to Ploiești. In 1996, he graduated from the sculpture department of the "Nicolae Grigorescu" Academy of Arts in Bucharest, obtaining a degree in Fine Arts. Among his monumental works, we can mention: *the Bust of Gala Galaction* (Bucov, Prahova, 2004), *the Bust of Calistrat Hogaș* (Bucov, Prahova, 2004), and *the Bust of Carmen Sylva* (Ploiești Art High School, 2010) (*Vatra Meșterilor și Creatorilor de Patrimoniu*). Avram Iancu became the spiritual patron of the school starting on October 1, 1995, when the school was called "Avram Iancu" School for grades I–VIII (*Avram Iancu Secondary School, Oradea*).

Daniel Tărăsie was born in Beiuș in 1975. Between 1995 and 2000, he attended the Faculty of Visual Arts, Sculpture Department, at the University of Oradea. Another monumental work created by him is the Bust of Avram Iancu in Gârda de Sus, Alba County (2007) (*Vatra Meșterilor și Creatorilor de Patrimoniu*).

Also in Beiuș, on September 30, 2010, a bust of Avram Iancu was unveiled in the Central Park. The work was created by the local artist Alexandru Crăciun, with the commission coming from the members of the "Avram Iancu" Association in Beiuș. Established in 2005 as a branch of the "Avram Iancu" Cultural-Patriotic Society, the organization became an independent association in 2010, following the Decision of December 13, 2009 (Degău, 2024, p. 44). The monument was funded with the financial support of the Association's members and the assistance of the artist himself, Alexandru Crăciun. The bust of Iancu is made of a composite material and is accompanied by an obelisk made of natural stone, brought from near Beiuș (information provided via phone by the monument's author, Alexandru Crăciun, on October 4,

2024). The "Avram Iancu" Association in Beiuș is currently led by Viorel Ianc, and has an active program of events. Since 2005, the Association has organized the competition "Avram Iancu – Craișorul Munților," aimed at middle and high school students. As of 2024, the competition has reached its seventeenth edition.

The bust of Avram Iancu in Marghita is made of a composite material patinated in bronze (information provided via phone by the monument's author, Alexandru Crăciun, on October 4, 2024), and was created by the sculptor Alexandru Crăciun. The work was commissioned by the "Avram Iancu" Cultural-Patriotic Society, Marghita Branch, and the Marghita City Hall, with the support of local sponsors. A key role in the realization of this monument in Marghita was played by the then-president of the Branch, Professor Aurel Nandra. The bust is located in the central area of the city, near the Cultural House and the Marghita City Police. The unveiling ceremony of the bust took place in a festive setting on May 6, 2011 (Bursașiu, 2023).

To commemorate Avram Iancu's stop in the city on the Crișul Repede River, the "Avram Iancu" Cultural-Patriotic Society, Oradea Branch, commissioned an effigy of the Hero of the Mountains on June 24, 2015. The effigy bears the following inscription: "In this building, our national hero Avram Iancu rested on February 8–9, 1850, on his way to Vienna. The authorities and citizens of Oradea received him with respect, sympathy, and admiration" (according to the inscription on the commemorative plaque). The plaque, made of marble, is the work of the artist Cornel T. Durgheu. The unveiling ceremony of the monument took place on January 24, 2017, due to delays in obtaining the necessary approvals from the Ministry of Culture (the initiators did not submit the required documentation on time). Instead of postponing the event altogether, the organizers decided to unveil and bless the plaque in the Great Hall of the Oradea City Hall, during the symposium dedicated to the 230th anniversary of the martyrdom of Horea, Cloșca, and Crișan, as well as the 191st anniversary of Avram Iancu's birth (Chișbora, 2015). The plaque is located on the Vulturul Negru building in Oradea, facing Vasile Alecsandri Street.

An analysis of the public monuments in Bihor County dedicated to the memory of Avram Iancu reveals the existence of 14 such monuments. This includes both the effigy of Avram Iancu housed in the small museum within

the "Avram Iancu" Border Police Agents' Training School in Oradea and the effigy located at the headquarters of the Romanian Intelligence Service (SRI) Bihor. Both monuments are situated inside these institutions. Among these, 10 are busts, 2 are commemorative plaques, and 2 are effigies. In terms of their placement, the majority (12 in total) are located in urban settings (six in Oradea, two in Beiuș, and one each in Marghita, Ștei, Vașcău, and Salonta). Only two public monuments are situated in rural areas of Bihor, both in the locality of Avram Iancu.

Regarding the period of their construction, the data is as follows: two monuments were created prior to 1989 (both located in Avram Iancu), while the majority – twelve – were erected after the fall of the communist regime in Romania, primarily in the main urban centers of the county: Oradea, Beiuș, Salonta, Ștei, Vașcău, and Marghita.

Geographically, the monuments are predominantly concentrated in the southern half of the county, with seven located in Beiuș, Avram Iancu, Vașcău, Ștei, and Salonta. Six monuments are located in the county seat, Oradea, situated in the central part of the county, while only one monument is found in the northern part of Bihor, in Marghita. This geographic distribution of the monuments is consistent with the proximity of settlements in the southern part of the county to the historical region of the Moți.

The authors of the monuments are generally local artists. The majority of the monuments (two busts, one commemorative plaque, and two effigies) were created by Cornel T. Durgheu. Cornel T. Durgheu is a visual artist and a member of the Union of Visual Artists of Romania. He was born on November 16, 1945, in Berechiu, Cefa Commune, Bihor County. In 1978, he graduated from the "Ioan Andreescu" Institute of Fine Arts in Cluj, where he was the top of his class, specializing in sculpture. He later served as the dean and faculty member in the sculpture department at the Faculty of Visual Arts at the University of Oradea. Among his most significant works are: the *Obelisks* in Memory of the Heroes of Homorod (Bihor) and Sânnicolaul Român (Bihor) (1993, 1994); *the Monument to the Martyrs Dr. Ioan Ciordaș and Dr. Nicolae Bolcaș* (Beiuș, 1995); the *Firefighters' Monument* (Oradea, 1996); the busts of *Avram Iancu* (1994), *Mihai Viteazul* (1995), *Onisifor Ghibu* (1995), *Emanoil Gojdu* (1996), *Constantin Brâncuși*, and *Lucian Blaga* (1998), all in Oradea, as well as many effigies and medallion reliefs (Cebuc, Florea, Lăptoiu, 2000, vol. III, p. 66).

Alexandru Crăciun, the creator of three monuments in Bihor, is an independent artist and a former member of the Union of Visual Artists of Romania. He was born on February 7, 1952, in Beiuș, where he continues to reside. Sculptor Paul Vasilescu, born on August 31, 1936, in Sărățeanca, Buzău County, graduated from the *Nicolae Grigorescu* Institute of Fine Arts in 1961. He made his debut at a regional exhibition in Dobrogea, Galați, and subsequently participated in numerous major national art events. He also exhibited his works at international Romanian art exhibitions abroad and was invited to several prestigious international exhibitions. In 1967, Vasilescu was awarded the Prize for Monumental Art, and in 1968, he received the Prize for Sculpture. Among his notable monumental works are: *Stejarul din Borzești* (Onești), *Ion Andreescu* (Buzău), *Nicolae Bălcescu* (Blaj), *Petru I Mușat* (Suceava), *Basarab I* (Curtea de Argeș), *Eroica* (Timișoara), *Ionel Brătianu* (Alba Iulia), *Andrei Șaguna* (Sf. Gheorghe), *Iancu de Hunedoara* (Hunedoara), and *Regina Maria* (Alba Iulia) (Cebuc, Florea, Lăptoiu, 1998, vol. II, p. 189).

An important role in the creation of public monuments dedicated to Avram Iancu in Bihor and beyond has been played by the *Cultural-Patriotic Society „Avram Iancu"* of Romania. This non-governmental organization, founded in 1992 and headquartered in Cluj-Napoca, was established by a group of prominent individuals, including Nicolae Văleanu (engineer and professor), Ștefan Pascu (academician), Gelu Neamțu (university professor and doctor), and Vasile Iuga, among others. According to its Statute, the mission of the Association is "to employ a comprehensive range of modern informational tools and methods to cultivate and disseminate among Romanians, Moți, and their sympathizers the ideological legacy of our ancestors, whose banner was represented by the illustrious figure of AVRAM IANCU, with a focus on improving the economic, social, cultural, and spiritual life of the Moți people everywhere" (*Societatea Cultural-Patriotică Avram Iancu din România*).

Among the key objectives of the Association is the creation of monuments, obelisks, statues, the installation of commemorative plaques, as well as the establishment of memorial houses and museums. The organization is also involved in organizing scientific sessions, symposia, commemorative events, and cultural-artistic activities (*Societatea Cultural-Patriotică Avram Iancu din România*). According to a list compiled by Vasile Tutula following the National Council meeting of February 27, 2022, the *Societatea „Avram*

Iancu" had 60 branches, the majority of which were located within Romania, with additional branches in countries such as Canada, Serbia, the United States, and Switzerland (*Societatea Cultural-Patriotică Avram Iancu din România*).

Conclusions

The year 2024 has been officially designated by the Romanian state authorities as the "Year of Avram Iancu," commemorating the 200th anniversary of his birth. This event has catalyzed a marked increase in activities dedicated to the remembrance of the *Crăișorul Munților* (Prince of the Apuseni Mountains), driven both by public institutions engaged in cultural, educational, and research endeavors, as well as by non-governmental organizations. In this context, the present study focuses on the public monuments dedicated to Avram Iancu in Bihor County, contributing to the ongoing commemorative initiatives.

Shortly after Avram Iancu's death, a movement emerged advocating for the erection of a public monument in his honor. However, the realization of such a monument was not feasible during the Austro-Hungarian dualism and could only take place after the establishment of Greater Romania. Over the years, several public monuments have been constructed to preserve the memory of this Transylvanian hero. In Bihor County, the first public monuments were not built until the 1970s, in a settlement located in the southern part of the county, founded by the *moți* (inhabitants of the Apuseni Mountains). The majority of public monuments in the county were erected following the fall of the communist regime in Romania and are the result of collaborative efforts between local authorities, non-governmental organizations, and private individuals. Most of these monuments are situated in urban areas of the southern part of Bihor County. With the exception of the village of Avram Iancu, all of the monuments dedicated to Avram Iancu in Bihor are found in urban settings, where established intellectual communities are present. This distribution highlights the crucial role played by local intellectuals in the creation of these monuments.

The erection of monuments dedicated to Avram Iancu was intrinsically linked to the political dynamics of the time. Prior to the 1918 Union, Avram

Iancu did not have a monument to commemorate his deeds and legacy among the Romanian people. The political climate of the period was overtly hostile toward the personalities and historical memory of Romanians in Transylvania. During the interwar years, substantial efforts were made to establish monuments in honor of Avram Iancu, particularly in areas associated with his life and activity as the *Crăișorul Munților* (Leader of the Mountains).

The advent of the Stalinist communist regime in Romania led to the suppression of national history and the marginalization of figures who had played significant roles in the national movement of the Romanians. It was only after Stalin's death that a period of political *thaw* began, allowing the Romanian communist regime to promote national history, albeit within the constraints and ideological boundaries set by the ruling party. This shift is evident in the subsequent erection of public monuments honoring Avram Iancu. It was only after the fall of the communist regime and the establishment of democracy in Romania that a concerted effort emerged to construct numerous busts and monuments in Bihor County, particularly in locations where the memory of Avram Iancu remains firmly entrenched in the collective consciousness of his descendants.

Photo 1. Avram Iancu
[source: *Familia*, year 18 (119), no. 6 (214), june 1983, p. 1]

Photo 2. The commemorative plaque on the *Vulturul Negru* building in Oradea, Vasile Alecsandri Street (photo: Mircea Matei)

Photo 3. The bust of Avram Iancu located within the premises of the "Avram Iancu" Secondary School in Oradea (photo: Mircea Matei)

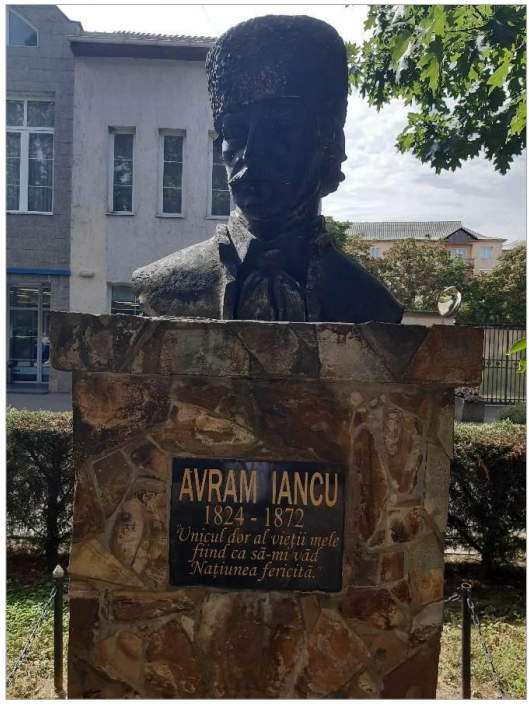

Photo 4. The bust of Avram Iancu from Marghita
(photo: Cosmin Patca)

Photo 5. The installation of the Avram Iancu monument in Traian Park, Oradea (photo source: Negoiță Lăptoiu, Durgheu, Aureo Publishing House, Oradea, 2015, p. 42)

Photo 6. The bust of Avram Iancu in Traian Park, Oradea, present day (poto: Mircea Matei)

Photo 7. The bust of Avram Iancu in front of Avram Iancu Secondary School No. 1. (photo: Mircea Matei)

Photo 8. The bust of Avram Iancu in Salonta, Central Park (photo: Mircea Matei)

Photo 9. The bust of Avram Iancu in Ștei (photo: Iulia Vaisărhofer)

Photo 10. The commemorative plaque of Avram Iancu in Beiuș, Burgundia Mare Street (photo: Iulia Vaisărhofer)

Photo 11. The bust of Avram Iancu in Beiuș – detail (photo: Iulia Vaisărhofer)

Photo 12. The bust of Avram Iancu in the Vașcău Cultural Center (photo: Iulia Vaisărhofer)

Photo 13. The effigy of Avram Iancu – the museum of the „Avram Iancu" Border Police Officer Training School in Oradea (photo: Mircea Matei)

Photo 14. The bust of Avram Iancu in Salonta (photo: Mircea Matei)

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The Publishing Activity of the Romanian Historian Nicolae Bălcescu

Abstract

Over the years, Nicolae Bălcescu (1819–1852) worked as a historian, writer, politician and he also was an outstanding figure of the 1848 Revolution in the Romanian space. According to his conception, a lasting bond between the Romanians separated in the middle of the 19th century by the Carpathian Mountains could be established on cultural level. From this perspective, the present study aimed to highlight the activity of the Pashoptist leader in the field of publishing. Undoubtedly, Nicolae Bălcescu illustrated the most suggestive portrait of the romantic historian from the Romanian space. Under this lens, while presenting the work done by the Romanian scholar in the direction of publishing in various periodicals from Transylvania, Wallachia, Moldova or abroad. Bălcescu's journalistic debut was marked by a printing in the periodical called *Propășirea* in 1844 and culminated with his publishing of the newspaper *Magazin istoric pentru Dacia*, in Bucharest, together with the Transylvanian professor August Treboniu Laurian, newspaper that was first published in 1845. Through his conception of history reflected in the various studies published in the periodicals of the mid-19th century, Nicolae Bălcescu marked a turning point in the modernization of Romanian and European historical writing.

Keywords: historical writing, pashoptism historiography, 19th century, publicity activity, national ideal.

Działalność wydawnicza rumuńskiego historyka Nicolae Bălcescu

Abstrakt

Nicolae Bălcescu (1819–1852) był na przestrzeni lat historykiem, pisarzem, politykiem oraz jedną z czołowych postaci rewolucji 1848 roku na ziemiach rumuńskich. W jego przekonaniu trwała więź między rozdzielonymi w połowie XIX wieku przez Karpaty Rumunami mogła zostać zbudowana na gruncie kultury. Z tej perspektywy niniejsze opracowanie ma na celu ukazanie działalności lidera pokolenia paszoptystów

w obszarze publikacji. Bălcescu stanowi najpełniejsze uosobienie romantycznego historyka w przestrzeni rumuńskiej. W tym kontekście przedstawiono jego dorobek związany z publikacjami w różnych czasopismach ukazujących się w Transylwanii, Wołoszczyźnie, Mołdawii oraz poza granicami Rumunii. Debiut publicystyczny Bălcescu miał miejsce w 1844 roku na łamach czasopisma „Propășirea", zaś zwieńczeniem jego działalności było wydanie w Bukareszcie wspólnie z transylwańskim profesorem Augustem Treboniu Laurianem pisma „Magazin istoric pentru Dacia", którego pierwszy numer ukazał się w 1845 roku. Poprzez swoją koncepcję historii, wyrażaną w licznych artykułach publikowanych w czasopismach połowy XIX wieku, Bălcescu wyznaczył nowy kierunek w procesie modernizacji historiografii rumuńskiej i europejskiej.

Słowa kluczowe: historiografia, paszoptyzm, XIX wiek, działalność publicystyczna, idea narodowa

Introduction. Methodological aspects

Romanian historiography, like that of the rest of Europe, underwent a series of changes during different eras. The field of historical research progressed over time, with many historians identifying 1848 as a turning point and a moment of high tension "in Romanian historiographical experience" (Cristian, 1996, p. 7). If we strictly refer to Romantic historiography, we can say that it was defined primarily by a profound national character (Boia, 1976, p. 99). Thus, the emphasis shifted from the universal to the national and social directions specific to the history of each nation. In turn, the historiographical framework of the Pashoptist[1] movement is made up by several aspects, in which both the thinking and the aims of the movement of the generation of 1848 were reflected (Vaisărhofer, 2024, p. 528). For a better understanding of the period we are referring to in the historiographical field, it is of primary importance to establish the temporal limits of the Pashoptist movement and how it spread beyond the Romanian borders. In this regard, we recall the words of the historian Paul Cornea: "Literary epochs do not begin and end like human life, at a fixed date, but involve a longer or shorter period of transition, in which elements of the new and old structures coexist and seem to dispute their primacy' (Cornea, Zamfir, 1969, p. 8). In the con-

[1] It is a Romanian translation of the term "pașoptist". "Pașoptism" = the ideology of the participants in the revolution of 1848 in the Romanian Countries.

text of the Romanian realities of the time, the flames of the different cultural currents that have passed through the Romanian scene could not burn out in a slow, organic way. This explains the fact that the ideas of the recent Romanian Pashotism did not represent a break with the Enlightenment values that were still alive in the writings of some Romanian intellectuals, but rather a settling of these values within a framework built around the national principle.

However, for a relative framing of the Pashoptist current in the period, we are forced to operate with fixed historical data, so that historians have unanimously agreed on the period 1829–1859 (Cornea, Zamfir, 1969, p. 9), from the foundations of Romanian newspapers until the Union of the Romanian Principalities under the reign of Alexandru Ioan Cuza.

On the other hand, the way of thinking of the Romanian pashoptists was not a singular case of the 19th century but is perfectly in line with European realities. Romanian intellectuals of a pashoptist nature, the vast majority of whom were educated in Western cities, came into direct contact with the ideas that were sweeping Europe at that time. At the same time, it should be emphasized that the Pashoptist historians adapted the ideas of the time to Romanian realities, where, beyond the educational background of the intellectuals, the national idea and the idea of unity of the Romanian people were paramount.

Based on the historian Alexandru Zub's assertation that pashoptism means "to look at the past through the prism of the present, to shift the emphasis from the universal to the national, to show interest in the popular masses and in social history, to combat factology in favor of synthesis" (Zub, 1981, p. 213), it is understandable that once they returned from the West in the middle of the 19th century, Romanian scholars gave birth to a real movement manifested first and foremost in the establishment of cultural institutions and associations, the Romanian-language press, the development of education and the production of works of great historical value.

Thus, we can talk about a generation of Pashoptists, whose unifying factor is closely linked to the need to forge a common path towards the national ideal – unification. In this respect, it should be emphasized that several specific elements emerge from the Pashoptist movement: the modernization of society, the solution of social problems, the transformation of political insti-

tutions and the "triumph of the national idea" (Hurezeanu, 2001, p. 159). It was in this context that the Romanian historian Nicolae Bălcescu carried out his historiographical and publicist work.

Bearing in mind the aspects contained in the above lines, this paper aims to highlight a component part of Romanian pashoptism: the publicist activity of Nicolae Bălcescu, one of the leading representatives of the 1848 generation. It is important to note that through such an analysis, we can identify the purpose for which Bălcescu, like other pashoptist historians and writers, compiled and circulated a significant number of works and studies of a historical nature which essentially succeeded in capturing the importance of history in the context of the events of the mid-19th century.

From a methodological point of view, the first thing that we had to consider was to recognize the works that discussed in one way or another the issue related to the life and activity of the historian Nicolae Bălcescu. Thus, we identified a total number of 215 works as relevant for our object of study.

Before moving on to a proper analysis of Bălcescu's publishing and editorial activity in the mid-nineteenth century, it is entirely relevant to sketch a radiography of the historiography of the problem. Thus, we have succeeded in making a brief review of a part of the works that in an absolute or partial way, have dealt with the subject of the study proposed for debate, starting from a general framework to a particular one.

Therefore, we must first read the most important works that have framed the issue of Romanian Pashoptism within the general parameters of Romanian historiography's history. In the chronological order of the works, we mention Pompiliu Teodor with the volume *Evoluția gândirii istorice românești* (1970), Lucian Boia with his work *Evoluția istoriografiei române* (1976, and Alexandru Zub with the work *A scrie și a face istorie* (1981). On the same coordinates we also include the works: *O istorie a istoriografiei române* (1996) and *Istoriografie generală și românească* (2001 by Damian Hurezeanu (Vaisărhofer, 2024a, p. 529).

As we get closer to the particular framework of the present study, it is worth recalling that the issue of Romanian Pashoptism has been dealt with by Paul Cornea and Mihai Zamfir in their volumes: *Gândirea românească în epoca pașoptistă*, *Originile romantismului românesc* și *Oamenii începutului de drum*, published between the years 1969–1974, Radu Tomoiagă with *Per-*

sonalități și tendințe în perioada pașoptistă (1976) and Vasile Cristian in his work *Istoriografie pașoptistă* (1996). Tangentially, an approach to Pashoptist literature can be found in the work published by George Călinescu as early as 1941 under the title *Istoria literaturii române de la origini până în prezent*, which is doubled by the second volume of *Istoria literaturii romane*. *De la Școala Ardeleană la Junimea* (1968), coordinated by Al. Dima, I.C. Chițimia, Paul Cornea and Eugen Todoran. Dan Berindei's *Cultura națională română modernă* (1986) is in the same direction/ vein Numerous articles also addressed the Pashoptist current within the Romanian context. Relevant examples include: *Premisele și trăsăturile istoriografiei pașoptiste* (1971), by Vasile Cristian; *Problema editării izvoarelor în istoriografia română din epoca modernă* (1971), by Alexandru Zub; and *Interfețe europene în gândirea istorică de la 1848* (1990), by Florian Roateș (Vaisărhofer, 2024a, p. 529).

If we focus our attention strictly on the central subject of the present study, namely: Nicolae Bălcescu's publicistic activity, the historiographical picture is composed of a series of works bearing the signature of some important historians. In this direction, we mention that the works bearing the signature of the historian Nicolae Bălcescu were contained in four volumes, which saw the light of the printing between 1964 and 1982, under the editorship of G. Zane and Elena Zane: *Opere. Scrieri istorice, politice și economice, 1844–1847*, *Opere. Scrieri istorice, politice și economice, 1848–1852*, *Opere. Românii supt Mihai Voevod Viteazul*, *Opere. Corespondența*. Under the tutelage of G. Zane, also appeared: *Bălcescu la Biblioteca Poloneză din Paris* (1973) and *N. Bălcescu, Omul. Opera. Epoca* (1975). A significant number of historians have researched the work of Balcescu. P.P. Panaitescu and the volume *Nicolae Bălcescu. Patru studii istorice* (1928), Dumitru Almaș with the work *Bălcescu*, *democrat-revoluționar* (1962), Dan Berindei with the volume *Bălcescu* (1969), Vasile Netea, *Viața lui Nicolae Bălcescu* (1973) and Valeriu Stan – *Nicolae Bălcescu* (1978), among many others (Vaisărhofer, 2024a, p. 530).

An important aspect of the research methodology was the identification of the periodicals that appeared from the 1830–1840, on both sides of the Carpathians, and which represented a point of connection between Romanian scholars of the Pashoptist period. The main studies bearing the signature of Nicolae Bălcescu were published in periodicals such as *Propășirea*, *Dacia*

Literară, *Magazin istoric pentru Dacia* or *Foaie pentru minte, inimă și literatură*. At the same time, from a methodological perspective, it was relevant to focus on the favorite topics included in Bălcescu's historical work, which to a large extent reflect the Pashoptian thinking in relation to the national past and the role of history in the events in the Romanian space in the mid-nineteenth century.

Nicolae Bălcescu – pashoptist historian

Undoubtedly, Nicolae Bălcescu illustrated the most evocative portrait of the romantic historian of the Pashoptist period. According to the Romanian historian G. Zane, Bălcescu's conception corresponds to a strong national sentiment, with a pronounced progressive tendency, inspired by an unwavering revolutionary faith, and thus opened a new era in Romanian historiography with his vision of history (Zane, 1975, pp. 36–38).

Nicolae Bălcescu's historical perspective was painted in an incipient phase through the writings of Romanian scholars, over which were laid the nuances received from foreign historiography, especially from the French environment, represented by intellectuals such as Quinet, Michelet, Guizot (Vaisărhofer, 2024b, p. 174).

An aspect that categorically sets Nicolae Bălcescu apart from other scholars refers to the vision of the pashoptist leader of human existence, which includes two major elements: "history that depicts the phenomena and revolution that creates the foundations of progress" (Smântănescu, 1972, p. 5).

From this point of view, we can state that Nicolae Bălcescu, through his historical writing, sought to make known his vision on the problems facing the Romanian people in the middle of the 19th century. In his view, there was only one way to solve them: revolution

After all, through his historical writing, Nicolae Bălcescu confessed his social-political ideals and fulfilled what he saw as his obligations towards the Romanian people. Thus, the writings bearing Bălcescu's signature were elaborated under the sign of his historical and social vision (Vaisărhofer, 2024b, p. 175). Beyond some exaggerations present in Bălcescu's works, given the context of the era in which they were written, it is certain that he succeeded

in defining a new way of writing history which clearly differed from previous historical writing through the critical, scientific and modern methods used (Vaisărhofer, 2024b, p. 175). A proof of this is the testimony of Jules Michelet who saw in Nicolae Bălcescu "a first-rate scholar and yet a very clear, very bright practical spir" (Michelet, 2000, p. 47).

Nicolae Bălcescu's publishing activity

For Nicolae Bălcescu, culture occupied a leading place in establishing links between the Romanians of the three countries, so that he "saw in the cultural phenomenon of the Romanian Countries a unitary whole and strove to contribute to the crystallization of a full cultural unity of the Romanian people" (Berindei, 1969, p. 36).

On the basis of this conception it is easy to understand the main reason why Bălcescu carried out an extensive cultural and publishing activity. Despite a short activity of only nine years, Nicolae Bălcescu left behind a body of work that impresses both through the historical research and documents that the author draws on, as well as through his writing style and the manner in which he presents his ideas. Nicolae Bălcescu's work includes articles and studies related to social, political, economic and military history, biographies of historical figures and the extensive work Românii supt Mihai Voevod Viteazul, which he left unfinished due to the historian's premature death. As historian Valeriu Stan noted, in the works written by Nicolae Bălcescu, we are dealing with "a militant history that aims to take action, using the most effective elements to stimulate, particularly, national feelings in the readers" (Stan, 1978, p. 67).

It should be noted that the Romanian historian's work as a publicist began as early as the beginning of 1844, when he wrote a letter to Ion Ghica (Romanian writer and politician), informing him of his intention to write a gazette, but also that he gave up his idea to give support to the newspaper *Propășirea* from Iasi (Stan, 1978, p. 67), which was under the coordination of Mihail Kogălniceanu, Romanian historian and politician, one of the founders of modern Romania. In the direction of the collaboration with the newspaper from Iași, Balcescu showed his enthusiasm, as he himself said: "the news about the *Propășire* has brought great joy to all of us, we are only looking for it not to be ephemeral like all the others" (Bălcescu, 1982, p. 44).

Shortly afterwards, the first historical study submitted by Nicolae Bălcescu was published in the magazine of the city of Iași, namely *Puterea armată și arta militară de la întemeierea Principatului Valahiei până acum*, along with several articles written by other representatives of the generation from 1848 such as: Dimitrie Bolintineanu, Cezar Bolliac, Ioan Voinescu II. The mentioned study is "an erudite writing, based on the criticism of historical news from charters and chronicles" (Panaitescu, 1932, p. 16), in which the idea of the armed force dominates. According to Balcescu, the Romanians' armed force consists of: the army, the militia and the rising of the mobs. Therefore, the study is divided into three parts, where the evolution of the "components" of the armed power, the glory of the Romanian army, but also its decline over the centuries, its disbanding under the Phanariot regime, up to the situation of the state institutions during the Organic Regulation.

Against the background of the banning of the periodical in Iași by orders of the ruler Mihail Sturdza, Moldovan scholars in collaboration with the Wallachian intellectual elite intended to edit a new magazine of the same name in Bucharest, under the care of Nicolae Balcescu. The project could not fully materialize, as Bălcescu, despite all his attempts, failed to return to the country, as he was still in Paris. In January 1847, a new weekly newspaper, *Album științific literar* was founded in Bucharest in place of *Propășirea*, this time edited by Constantin N. Brăilei (Berindei, 1969, p. 88). Because of the ideas it promoted, the new gazeta was forced to cease its activity early on, being banned by the authorities.

Through his cultural collaboration, Nicolae Bălcescu established a close friendship with Mihail Kogălniceanu, for which reason the two used to "advise each other and encourage one another, even planning to collaboratively write a biographical dictionary of the great figures in the history of our people" (Almaș, 1962, p. 20), which was to be printed by the *Asociația Literară*. The intention of the two scholars is even reflected in a letter sent to the Committee of the Literary Association in Bucharest, in July 1846: "One of the books that would contribute greatly to the spread of the taste for learning and especially the knowledge of national history would certainly be a biographical dictionary, which would include the lives of the most important Romanians of all countries and of all ages. Such a book, the only historical writing that can be made according to the present state of history, we are

duty bound to process it, according to the manner and the march that the committee itself would prescribe" (Bălcescu, 1964, p. 65).

The close relationship between Bălcescu and the Moldovan pashoptist leaders in the cultural and publishing field, was coupled with an active collaboration, across the Carpathians, with George Baritiu and the Brașov – based gazeta *Foaie pentru inima, minte și literatura*. Proof of this can be seen in the publication in that newspaper of an article translated into Romanian by Bălcescu. It is entitled *Filosofie soțială*, which was published in 1846.

The Romanian historian's most valuable publicistic work was the periodical *Magazin istoric pentru Dacia*, which edited together with professor August Treboniu Laurian. Bălcescu's work in the periodical was essential, which is why he published a series of studies and articles in which he tried to draw new guidelines in the study of history, on the one hand, and on the other to capture a picture of the various Romanians chroniclers, seen as the only ones who wrote a national history, as far as they possibly could (Netea, 2019, p. 37). In this direction, we mention the works: *Prospect*, *Cuvînt preliminariu despre izvoarele istoriei românilor*, *Românii și fanarioții*, *Despre starea soțială a muncitorilor plugari în Principatele române în deosebite timpuri* and the biography of spătar (military adviser/ military leader) Ion Cantacuzino, of the logofăt (chancellor) Ioan Tăutu, Chronicler Miron Costin, and of the stolnic (noble steward) Constantin Cantacuzino.[2] The Romanian historian has published a series of studies on historical, political, social, and economic issues in the *Magazin istoric pentru Dacia*. In what follows, we will highlight the most significant of these. In 1846 Bălcescu published, *Prospect al Magazinului istoric pentru Dacia*, in which he presented the six headings of the periodical: *Cronicul românesc, Diplomaticul românesc, Memoratorul dacian, Inscriptoriul dacian, Disertatoriul istoric și Buletinul bibliografic*. Another study published in the newspaper Magazin istoric pentru Dacia, entitled Cuvînt preliminariu despre izvoarele istoriei românilor, gave the historian the opportunity "to present his conceptions regarding the character that history should have, its complexity, and scope of action" (Berindei, 1969, p. 67). In his article, the historian appeals to different categories of historical documents and sources, creating a "picture" of them given that only they can provide us with infor-

[2] Titles such as "spătar", "logofăt" and "stolnic" are kept in their original form as they refer to specific historical positions in Romanian history.

mation about "domestic history: institutions, rights, political organization, and social life" (Panaitescu, 1932, p. 16). Bălcescu took care of the elaboration and publication of five biographies, four of them of: Ioan Tăutu, Ioan Cantacuzino, Constantin Cantacuzino, and Miron Costin were published in addition to the first volume of the periodical *Magazin istoric pentru Dacia*, and the last biography, of Răzvan Vodă was published after the historian's death, in 1855. In the same vein, in 1847, the article *Buletin despre portretele principilor Țării Românești și ai Moldaviei, ce se află în cabinetul de stampe de la Biblioteca Regală din Paris* saw the light of day. It contains portraits of several rulers: Mihai Viteazul, Matei Basarab, Vasile Lupu, Gheorghe Ștefan, Constantin Șerban, Mihnea III, Grigore Ghica, Constantin Brâncoveanu, Constantin Mavrocordat. Published in 1845, the article Românii și Fanarioții describes in a negative light the Phanariot regime and the struggle between the Romanians and the rulers of Fanar, stating that: "This article aims to briefly show the special phases of these two centuries of struggle between the Romanians and Phanariots" (Bălcescu, 1974, p. 107). In this brief but precise study, one can best observe the antithesis between the foreign element and the Romanian element, the opposition between the Phanariots who, with "all their power, tore up our old constitution and spoiled the good customs of the country" and the chosen figures of the Romanian people who "defend a holy cause and want to sacrifice themselves for it" (Bălcescu, 1974, p. 107). Nicolae Bălcescu's vision of the Phanariot reigns is present throughout entire study (Vaisărhofer, 2023, pp. 73–74) and was also taken up in the pages of other works, such as, for example, Drepturile românilor la Înalta Poartă, published on the eve of the 1848 revolution. In the study, the rights corresponding to Romanians for whom "Our parents shed their precious blood (…) And our duty is to preserve them with the same power for our sons" (Bălcescu, 1974, p. 11) were briefly presented, making it clear from the very beginning that: "Our Wallachia was never subdued by the sword, but willingly recognized itself under the protection of the Turks" (Bălcescu, 1974, p. 8).

Bălcescu also focused on social issues. For example, the study *Despre starea socială a muncitorilor plugari în Principatele române în deosebite timpuri*, which saw the light of day in 1846, was an open attack on the boyars for the existing social situations, the author advocating for the improvement of the peasants' situation through granting them land ownership. On the other

hand, in the ranks of the *Magazin istoric pentru Dacia*, Bălcescu took up the idea of armed force in the Romanian space in three articles. The first one is *Puterea armată și arta militară la moldoveni în timpul măririi lor*, published in volume II of the periodical in 1846. This work was basically a complement to the study dedicated to Wallachia and revisited the issues presented within it. Bălcescu's vision of the importance and role of the armed forces in the interior of the country is also outlined in the study of the *Campania românilor în contra turcilor la anul 1595* published in 1847. Some years later, the article was included in the work *Românii supt Mihai Voevod Viteazul*. A last study dealing with the issue of the army is entitled *Comentarii asupra bătăliei de la Cîmpii Rigăi sau Cosova (17, 18, 19, octombrie 1448)*. According to Bălcescu, the press was also a useful means of propaganda in 1848, and in July he was given the task of editing the periodical *Învățătorul satului*. He collaborated with other Romanian intellectuals such as: Professor Fontain, C. Aristi, A. Zane, A. Crețescu. Under his care, seven issues of the newspaper were published, most of which aimed at arousing the revolutionary sentiment in the hearts of the peasants and raising their standard of living (Berindei, 1969, p. 136). Unfortunately, no copies of the above-mentioned newspaper have been preserved. During this period, Bălcescu tried to create a new periodical, called *Națională*, which he envisioned as a powerful propaganda organ. In the end, his project could not be realized, so Nicolae Bălcescu joined the editorial staff of the newspaper *Popolul Suveran*, together with Bolintineanu, Bolliac, Teulescu, A. Zane and Gr. Alexandrescu. In connection to his work in the two newspapers, Bălcescu confessed to A. G Golescu: "I reorganized the village papers and helped with the formation of the newspaper *Poporul Suveran*" (Bălcescu, 1964, p. 276).

In the pages of the aforementioned newspaper, Bălcescu took up the agrarian issue by publishing the article *Despre împroprietărirea țăranilor* in 1848. The article appeared as a pillar of support for the peasantry and, undeniably, as a response to the persistent opposition of the boyars regarding the granting of land ownership to the peasants. Another significant factor is the fact that the article "appeared immediately after the end of the debates of the Property Commission" (Stan, 1978, p. 72) at a time when few of the Pashoptist leaders had the peasant issue at the center of their attention. The idea of land ownership for peasants with land was extensively debated in

Nicolae Bălcescu's third work of social history, *Question économique des Principautes danubiennes*, written in 1850, as the agrarian issue was the economic issue Romanian Countries. The work was originally signed anonymously and appears as a general article written by Romanians in exile. Another article written by Bălcescu in 1850 and published together with C. Bălcescu, D. Brătianu, G.C. Florescu, Ș. Golescu, N. Golescu, G. Magheru, B. Mălinescu, A. Paleologu, Rosseti, J. Voinescu, bears the name *Manifest către poporul român*. The article summarizes the complaints of the Pashoptist leaders about the failure of the revolution and the time spent in exile: "Two years have passed since, by a treacherous treachery, torn from the bosom of the people, deprived of the sweet warmth of the sun of the homeland, we lie, suffering, on the land of exile" (Bălcescu, 1974, p. 102). The signatories of the article also appeal to the Romanians' national consciousness: "Romanian brothers! Never has our trust in the future of Romania, one great and indivisible, wavered in our hearts. Never will disunity be the sin to which we fall" (Bălcescu, 1974, p. 102).

Another study written by Nicolae Bălcescu in the post-revolutionary period was entitled *Manualul bunului român*, which remains in manuscript, and was an adaptation of a booklet written by the French author Charles Renouvier. Bălcescu wrote this work in order to "serve the Romanian agitators against the bourgeois domination reintroduced by the armies of foreign reaction" (Maciu, 1973, p. 55). The work consists of five brief chapters, the last of which was left unfinished: *Menirea omului, Menirea soțietății, Despre popor și stăpânire, Datoriile omului și ale cetățeanului, Drepturile omului și ale cetățeanului, Despre libertate*.

Nicolae Bălcescu also turned his attention to the revolution, to which he dedicated two works: *Mersul revoluției în istoria românilor* and *Mișcarea românilor din Ardeal la 1848*. The first study, published in Paris in 1850, analyzes the evolution of the Romanian people and the role of the revolution in this process. Throughout the study, an attempt was made to outline the path to be followed in order to achieve freedom and national unity. From the very first lines of the work, the historian emphasized the importance of knowing the national history: "Let's open history, the book of testimony of the ages, and enlightened by its philosophy we will see that (...) the Romanian nation (...) moved forward transforming itself and fighting unceasingly for the tri-

umph (...) of right over force, for the realization both within itself and in mankind of justice and brotherhood, these two foundations of the absolute, perfect order of the divine order" (Bălcescu, 1974, p. 107). In Bălcescu's view, the revolution of 1848 was not a chance, devoid of significance event, but on the contrary, it represented "a phase, a natural, inevitable historical evolution" (Bălcescu, 1974, p. 107).

In 1851, the publication Junimea română published the work Mișcarea romanilor din Ardeal in 1848, which followed the series of revolutionary events across the Carpathian Mountains, seen by the author as "one of the most wonderful deeds of this wonderful 19th century" (Bălcescu, 1974, p. 114), given that it was the "awakening of the Romanian nationality in Transylvania, after a hard sleep in a yoke that had burdened it for a thousand years" (Bălcescu, 1974, p. 114). According to Bălcescu, the movement of the Romanians in Transylvania made the unity and worthiness of Romanians known throughout Europe, so that the Romanian people was recognized as having the right to be "henceforth included in the number of living nations" (Bălcescu, 1974, p. 115).

In addition to writing for and collaborating with several Romanian newspapers, Nicolae Bălcescu came into contact with the Paris – based magazine *Revue de l'Orient*, to which he sent his study *Puterea armată* for publication in 1845, but he did not receive a concrete reply. A year later, a French translation of the aforementioned study appeared in the periodical, but signed by another author, J.A Vaillant (Panaitescu, 1924, p. 63), which attracted the attention of Nicolae Bălcescu. The French author's dishonest act was signaled in a letter sent by Bălcescu to the editors of the periodical. "The Revue de l'Orient of June of this year published an article on the Armed Forces and military art of the Romanians, signed Vaillant. This article is mine (...) Mr. Vaillant is therefore only the translator of this article, so please allow me to appeal to your impartiality and kindly request that you restore the name of the true author by inserting this letter in the next issue of the Revue" (Bălcescu, 1964, p. 67).

The foundational work elaborated by Nicolae Bălcescu and to which the author devoted himself entirely between 1850–1852 is represented by *Românii supt Mihai Voevod Viteazul*. Due to the historian's untimely death, the work remained in manuscript until 1861 when it was published by Alexandru Odobescu. *Românii supt Mihai Voevod Viteazul* was to consist of

six chapters, but the historian only managed to write four of them: *Libertatea națională*, *Călugăreni*, *Robirea țăranului*, *Unitatea națională* and part of the fifth chapter, *Miraslău*, the last part, *Goroslău* could not be written. The work sought to highlight two problems contemporary with Bălcescu: the social and the national.

In the case of this work, the emphasis was not placed on the actions of ruler Mihai Viteazul, but the main concern was centered on the situation of the Romanians in the three countries. The aim of the Romanian historian, which was achieved, referred to the creation in the eyes of the reader of an image of the past that would "spur contemporaries and descendants to action" (Berindei, 1986, p. 85). Bălcescu was of the opinion that in order to reawaken national sentiment and awaken the revolutionary spirit among Romanians it was absolutely necessary to appeal to the past. From this perspective, until the last moments of his life, he campaigned, for the drafting of a work which in his opinion should have depicted the glorious pages of the Romanian people under the scepter of a ruler from the medieval period: Mihai Viteazul (Vaisărhofer, 2024b, p. 180).

Conclusions

We conclude this paper by emphasizing the importance of historical writing in the writings of the Romanian Pashoptists. A conclusive example in this direction are the works of the Romanian historian Nicolae Bălcescu. Starting from this idea, it is much easier to understand both the reasons and the purpose behind Bălcescu's intense publicistic activity. In this way, he was able to bring to the attention or Romanians a part of the primary sources and historical works which, in Nicolae Bălcescu's view, like other pashoptists historians, became evidence of the historical past to be taken into account and implicitly a valid instrument for reawakening of the national spirit among the Romanian people. This last aspect was entirely necessary in the context of the events of the mid-19th century.

Therefore, it is explicable why it was first relevant to make a selective review of the publishing and editorial work of an important representative of the 1848 generation: Nicolae Bălcescu, so that later we can analyze in depth the historical writings written under the sign of pashoptist thought.

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We Have Never Been Disenchanted. Richard Hofstadter and the US-Polish Re-enchantment of the World

Abstract

This article shows how the disenchantment of the world has caused what I call a paranoid re-enchantment of the world. Max Weber introduced the disenchantment of the world in his lecture *Politics as Vocation* (1917). On Weber's account, a disenchanted world is the product of capitalism and the gradual retreat of religion. However, the Weberian thesis have been variously challenged. As Hans Joas claims, the disenchantment paradigm has to be historicised, read in accordance with the time and the space This is especially the case of politics in the United States of America and Poland, where the world has re-enchanted due to conspiracy theories and the abiding presence of religious influence. I will explain this re-enchantment of the world through Richard Hofstadter's famous notion of paranoid politics as outlined in his book *The Paranoid Style in American Politics* (1964). Hofstadter claims that political paranoia is not the product of unstable minds, but it is brought about by the perception of sane minds about conspiracies and threats from either inside or outside a country. President Donald Trump's apocalypticism and the ways in which Polish politicians have used the so-called gender ideology and abortion to stoke fear.

Keywords: Richard Hofstadter, Max Weber, disenchantment of the world, re-enchantment of the world, Donald Trump, Paranoia, abortion, gender ideology

Nigdy nie zostaliśmy odczarowani. Richard Hofstadter i amerykańsko-polski proces ponownego zaczarowania świata

Abstrakt

Niniejszy artykuł pokazuje, w jaki sposób proces odczarowania świata doprowadził – według autora – do paranoicznego ponownego zaczarowania rzeczywistości. Max Weber w wykładzie *Polityka jako zawód* (1917) wprowadził pojęcie odczarowania świata, uznając je za rezultat rozwoju kapitalizmu i stopniowego wycofywania się religii

z życia społecznego. Teza Webera była jednak wielokrotnie kwestionowana. Jak twierdzi Hans Joas, paradygmat odczarowania należy historyzować, uwzględniając kontekst czasu i przestrzeni. Dotyczy to szczególnie polityki w Stanach Zjednoczonych i w Polsce, gdzie doszło do ponownego „zaczarowania" świata za sprawą teorii spiskowych i trwałego wpływu religii. Autor wyjaśnia to zjawisko, odwołując się do słynnej koncepcji Richarda Hofstadtera – paranoicznego stylu w polityce – przedstawionej w książce *The Paranoid Style in American Politics* (1964). Hofstadter dowodzi, że paranoja polityczna nie jest wynikiem zaburzeń psychicznych, lecz raczej racjonalnym (choć wyolbrzymionym) postrzeganiem zagrożeń – zarówno wewnętrznych, jak i zewnętrznych – przez osoby zdrowe psychicznie. Artykuł odnosi te obserwacje do apokaliptycznej retoryki Donalda Trumpa oraz do sposobów, w jakie polscy politycy wykorzystywali tzw. ideologię gender i temat aborcji do wzbudzania społecznego lęku.

Słowa kluczowe: Richard Hofstadter, Max Weber, odczarowanie świata, ponowne zaczarowanie, Donald Trump, paranoja polityczna, aborcja, ideologia gender

Setting the argument: Richard Hofstadter, Trump, and PiS

In his lecture *Science as Vocation* (1917), Max Weber (1864–1920) introduced the notion of the disenchantment of the world, produced by processes of rationalisation and mechanization between the nineteenth and the twentieth century (Weber, 2004, p. 13). However, religious influence is ubiquitous in the West. In this contribution, I will mobilize Richard Hofstadter's notion of the paranoid political style to highlight the nexus between religion and politics in the US and in Poland.

This article is divided into four sections. In Section 1, I will address Hans Joas's imperative to historicize the disenchantment paradigm. In Section 2, by building upon Richard Hofstadter's paranoid style, I will show how this has produced a paranoid re-enchantment. In Section 3, I will elucidate how President Trump's rhetoric gestures towards such paranoid re-enchantment. In Section 4, I will explore how PiS (*Prawo i Sprawiedliwość*, "Law and Justice"), which ruled Poland from 2015 to 2023, created moral panics about the so-called gender ideology and abortion. The last section concludes the article.

Trump frequently uses the trope of the witch hunt. He feels persecuted by people wanting his downfall and he is the only one who can fight them. PiS in a similar manner, claims that Roman Catholicism and its values can defend Poland from gender ideology and abortion (Alekseev, 2024, pp. 1–21).

For this reason, I argue that Donald Trump and PiS politicians embody what Richard Hofstadter (1916–1970) famously defined as "paranoid style" in his landmark book *The Paranoid Style in American Politics* (1964). By "paranoid style," Hofstadter meant that paranoid statements are not uttered by people with mental disorders, but by *sane* people (Hofstadter, 1964, pp. 4–5). My claim is that political paranoia is an important feature of Polish and US politics.

By taking the cue from Bruno Latour's book *We Have Never Been Modern* (1991), I will prove we have never been disenchanted (Latour, 1993, pp. 114–116).

The will to historicizing: Hans Joas and disenchantment

Max Weber argued that the nineteenth and the twentieth century, "characterized by rationalization and intellectualization," signaled the disenchantment of the world (Weber, 2004, p. 30). As such, the divine has been replaced by "inner experience" (Weber, 2004, pp. 30–31). As Richard Swedberg and Ola Agevall claim, due to disenchantment "people no longer explain the world (…) with the help of magical forces, but instead rely on science and rational forms of thinking" (*Disenchantment*…, 2016, pp. 86–87). Hans Joas has taken disenchantment to task. Joas, in *The Power of the Sacred. An Alternative to the Narrative of Disenchantment* (2021), argues that it has to be "historicized" (Joas, 2021, p. 8). Historicizing means that the disenchantment paradigm can only be fruitfully understood if it is contextualized. This is the case, as "new narratives of religious history as it is intertwined with the history of power" are likely to emerge (Joas, 2021, p. 1). In the next section, I will show how one such new narrative, the paranoid re-enchantment of the world, accounts for the political landscape in the USA and in Poland.

Richard Hofstadter and the re-enchantment of the world in the USA

I will start this section by describing the trope of the witch hunt. In 2023, Trump claimed that he would be the retribution and the justice for those who have been wronged (Smith, 2022). He cast himself as the new messiah

and claimed he is the only US president enduring a witch hunt (Matthews, 2022). This trope is a recurrent and gendered theme in US history. Whilst women were mostly accused during the Salem witch trials, Trump nevertheless overrode such concerns (Erin, 2018, pp. 825–837).

Richard Hofstadter's paranoid style of American accounts for Trump's statement. He claims that such a posture is rooted in "using political rhetoric to get to a political pathology. One of the most impressive facts about the paranoid style, in this connection, is that it represents an old and recurrent mode of expression in our public life which has frequently been linked with movements of suspicious discontent and whose content remains much the same even when it is adopted by men of distinctly different purposes" (Hofstadter, 1964, p. 5). It describes "the reality of the style and to illustrate its frequent historical recurrence" (Hofstadter, 1964, p. 5). The following quotes from Hofstadter's book will allow me to historicize disenchantment.

The author of a sermon preached in Massachusetts in 1798 writes that "Secret and systematic means have been adopted and pursued, with zeal and activity, by wicked and artful men, in foreign countries, to undermine the foundations of this Religion [Christianity], and to overthrow its Altars, and thus to deprive the world of its benign influence on society … These impious conspirators and philosophists have completely effected their purposes in a large portion of Europe, and boast of their means of accomplishing their plans in all parts of Christendom, glory in the certainty of their success, and set opposition at defiance" (Hofstadter, 1964, p. 9).

The author highlights:

1. A conspiracy ("secret and systematic means").
   Such plans will undermine Christianity, which is the only religion in the USA ("to undermine the foundations of this Religion"), despite the Establishment and the Free Exercise Clause of the First Amendment.
3. Intellectuals ("philosophists") plot against the USA.
   In a Texas newspaper article of 1855, we read that "It is a notorious fact that the Monarchs of Europe and the Pope of Rome are at this very moment plotting our destruction and threatening the extinction of our political, civil, and religious institutions (…). The Catholics in the United States receive from abroad more than $200,000 annually for the propagation of their creed. Add to this the vast revenue collected here…" (Hofstadter, 1964, p. 8).

4. European monarchs threaten American Exceptionalism ("plotting our destruction and threatening the extinction of our political, civil, and religious institutions […]").
5. Roman Catholics conspire against the USA ("The Catholics in the United States receive from abroad more than $200,000 annually for the propagation of their creed").
   Some leaders of the Populist party in 1895 voice similar concerns. They wrote that "As early as 1865–66 a conspiracy was entered into between the gold gamblers of Europe and America … For nearly thirty years these conspirators have kept the people quarreling over less important matters, while they have pursued with unrelenting zeal their one central purpose … Every device of treachery, every resource of statecraft. and every artifice known to the secret cabals of the international gold ring are being made use of to deal a blow to the prosperity of the people and the financial and commercial independence of the country" (Hofstadter, 1964, p. 8).
6. A key word is "conspiracy." The Populist party, like the Massachusetts preacher and the Texan newspaper article, claim that a conspiracy is threatening the United States. The paranoid style "represents an old and recurrent mode of expression in our public life" (Hofstadter, 1964, p. 6). As Hofstadter claims, this attitude is not the one of people with mental disorders but of sane people.

Donald Trump and the paranoid re-enchantment of US politics

Donald J. Trump embodies such paranoid re-enchantment. In Waco, Texas, during the 2024 election cycle, he claimed that he was confronting a "(…) really prosecutorial misconduct. The innocence of people makes no difference whatsoever to these radical left maniacs," Trump said of the investigation by Manhattan District Attorney Alvin Bragg. "It is worse actually in my opinion – hard to believe anything can be worse than this – worse than ballot stuffing" (Downen, Melhado, 2023). His declaration is similar to the Texas newspaper article. "Radical left maniacs" have replaced the "monarchs of Europe and the Pope of Rome."

In Waco, David Koresh, the leader of the millenarian cult of the Branch Davidians, was killed during an FBI-ATF siege. Trump is a new version of David Koresh: he is the millenarian voice and justice of the people (Wade, 2023). Hofstadter stresses this fact by claiming that the paranoid politician "constantly lives at a turning point: it is now or never in organizing resistance to conspiracy. Time is forever just running out. Like religious millenarians, he expresses the anxiety of those who are living through the last days and he is sometimes disposed to set a date for the apocalypse" (Hofstadter, 1964, p. 30). In the same way that the Branch Davidians had to fight the federal government, Trump has to deal with the FBI and its probe into the classified documents (Collins *et al.*, 2022).

Trump sees a conspiracy against him (the "prosecutorial misconduct" of "radical left maniacs"). He feels like a martyr. Richard Conley re-emphasises this religious element by arguing his supporters consider him their saviour (Conley, 2020, pp. 1–2). He appeals to the new "religious right" (Spini, 2024, pp. 99–117). As Chiara Migliori and Anthea Butler contend, "white Christian voters feel as being endangered by cultural modernization and ethnic diversification" (Migliori, 2022, p. 7). As a consequence, they exercise "enormous power" (Butler, 2021, p. 12).

Puritanism is another cause of paranoid re-enchantment. In the next section, I am going to elucidate its impact on US politics via Sacvan Bercovitch's important book *The Puritan Origin of the American Self* (1975).

Puritan King Donald?

On Bercovitch's account, one of the most important features of Puritan political philosophy was the role of the sovereign. The Puritans "distinguished the merely good ruler from the saintly ruler, and insisted that the saintly ruler reflect his inward calling in his social role. Faith, indeed, was crucial to the proper execution of his duties. As his vocation was a summons from God, so his belief led him to do well in public office" (Bercovitch, 1975, p. 6). President Trump's supporters consider him the new Cyrus the Great (see *King James Bible*). In the same way that Cyrus had allowed the Jews back into their homeland, Trump will uphold Christian values and, as Gökariksel, Neubert, and Smith (2019, pp. 561–587) claim, "masculine power."

Rebecca Barrett-Fox claims that he has "fostered a sense of conservative Christians as under siege. They may be entitled to controlling the culture because of their great contributions to it, but they have not been treated this way" (Barrett-Fox, 2018, pp. 502–522). According to Wendy Brown, Trump/Cyrus embodies the "apocalyptic populism" supposed to "Make America White Again" (Brown, 2017, pp. 1–11). Brown claims that, for a certain demographic, Trump has become a "moral lodestar," who has brought Christian values to the forefront (Brown, 2023, p. 68, see also: Seidel, 2019, p. 35). By building upon Brown's argument, Ruth Braunstein (2024, pp. 131–161) claims that Trump will resist the (supposed) "repression against (…) white evangelicals." Michel Foucault might have claimed that Trump's policies will not only make America white again, but they will "make life healthier and purer" (Foucault, 2003, p. 255). It is necessary to demonize anything that is not heteronormative, Christian, and it is instead critical to upholding "a vivid sense of fear, foreboding, and anxiety" (Gökariksel, Neubert, Smith, 2019, pp. 561–587), or what Brown aptly labeled as apocalyptic populism.

In order to further historicize disenchantment, I am now going to investigate the role of PiS in Poland, the conservative party in power from 2015 to 2023. The party aligns with the Hofstadterian paranoid style by opposing gender ideology and abortion.

Gender ideology and the paranoid style of Polish politics

In government, PiS allied with the most conservative religious factions of the episcopate. They opposed LGBTQ+ rights and abortion (Meyer Resende, Henning, 2021, pp. 1–17). Furthermore, the party increased expenditure on church activities and organizations (Kamasa, 2023, pp. 73–96). Damian Guzek (2024) has claimed that this has led to a "pan-Catholization of the public space," significantly eroding religious pluralism. Most importantly, Soral, Cichocka, Bilewicz, and Marchlewska have claimed that gender ideology ignites "symptoms of paranoia" (Guzek, 2024, p. 374). As noted by Hofstadter, paranoia influences political behaviour.

Piotr Zuk and Pawel Zuk (2020, pp. 566–588) claim that "the PiS authorities also treat the 'Pole-Catholic' cliché as a permanent element of the definition of Polishness. For them, Catholicism is a natural element of national

tradition, and should therefore define the framework of historical, cultural, educational and social policies." Pole-Catholicism equates with traditionalism (Soral, Cichocka, Bilewicz, Marchlewska, 2018, pp. 372–385). No wonder that Jaroslaw Kaczynski claims that any attack on the Church is an attack to Poland, as the Church is the country's traditional, spiritual, and moral foundation (*Jarosław Kaczyński*..., 2019).

LGBT-free zones were one of the outcomes of this alliance. Adam Ploszka (2023, pp. 359–379) stresses the fact that local councils, usually in south-eastern Poland, supported "freedom of speech, the innocence of children, the authority of family and freedom, and economic freedom." They uphold "Christian values and longstanding tradition" (Ploszka, 2023, p. 363). They reject "political correctness, rightly called: homo-propaganda" (Ploszka, 2023, p. 363). Nausica Palazzo (2024, pp. 107–137) claims that in this case Christianity "has provided a repository of substantive values and doctrines (...) to suppress the rights of (...) LGBTQ people." Palazzo (2024, p. 137) goes on to argue that religion is a "marker." It marks the intention of the most conservative to wage culture wars to protect Christians from the (supposed) disintegration of natural bonds (Palazzo, 2024, p. 114).

Marlene Laruelle (2022, pp. 303–327) claims traditions resist "chaos" and its opponents are "the enemy of the natural order and should be fought against." In a similar way, Judith Butler (2024, p. 46) maintains conservatives view so-called gender ideology as "a form of religious discrimination, an attack on religious institutions and religious liberty." She claims that, for them, gender ideology questions "the natural and normative character of heterosexuality, and that once the heterosexual mandate is no longer firm, a flood of sexual perversities, including bestiality and pedophilia, will be unleashed upon the earth" (Butler, 2024, p. 5). Gender ideology is thus the imaginary enemy harming Pole-Catholic identity (Marchlewska, Cichocka, Łozowski, Górska, Winiewski, 2019, pp. 776–779). Paranoia and imaginary enemies fuel the political style described by Hofstadter.

Gender ideology is supposed to be an offshoot of Marxism. Agnieszka Graff (2014, pp. 431–442) contends that for Polish bishops it is "the product of many decades of ideological and cultural changes that are deeply rooted in Marxism and neo-Marxism, endorsed by some feminist movements and the sexual revolution. ... According to this ideology, humans can freely de-

termine whether they want to be men or women and freely choose their sexual orientation. … We call on educational institutions to engage in the promotion of an integral vision of man." Religion is therefore a civilizational and nation-building project in post 1989-Poland (Astor, Mayrl, 2020, pp. 209–226). It is possible to highlight these Hofstadterian features.

1. The author of the letter, the Polish episcopate, is undoubtedly of a sane mind.
2. The guilty of such a societal revolution are feminists and neo-Marxists. In the nineteenth-century United States of America the culprits were either the "Pope of Rome" or any European country. In Poland, Marxism is the guilty party.

In the next section, I am going to describe the way Marxism is supposed to have undermined a long-standing moral landscape through abortion.

Abortion and paranoid politics

When discussing abortion, Zuk and Zuk (2020, pp. 566–588) claim that questioning "the right of some citizens to life may lead to a situation when unborn disabled children will first be killed and then born children, the elderly and all those who will not fit into the new wonderful world of the left will be murdered." It is possible to discern the following tropes:

1. The anti-abortion campaigners argue that "the left" wants to euthanize the whole of Polish society.
2. They equate abortion with baby killing and therefore with a murderous agenda. This also implies foetal personhood, whereby foetuses "are treated the same under all laws as any other person" (Corning, 2024, pp. 322–351).
3. The parallel between abortion and Auschwitz shows the danger of the so-called "left." Rhetorically, *the argumentum ad metum* is very persuasive. Pro-life campaigners embody Jakub Potulsky and Arkadiusz Modrzejewski's "politics of fear" (Potulsky, Modrzejewski, 2024, pp. 64–80). Lars Svedsen (2008, p. 111) insists on this point by claiming that such fear is not transitory, but it is instead "created and maintained." Hofstadter's notion of paranoia unleashed by sane people against a (perceived) conspiracy aptly summarize these political strategies. He also

maintains that one of the causes of political paranoia is the need to "undermine and destroy a way of life" (Hofstadter, 1964, p. 29). Abortion will (supposedly) undermine Pole-Catholicism. Foucault might have viewed the dynamic between Pole-Catholicism and Marxism as relying on "a biological-type relationship" (Foucault, 2003, p. 255): the threat posed to the wellbeing of the population has to be swiftly addressed.

Marta Bucholc (2022, pp. 73–99) has described the evolution of the legal status of abortion in Poland. She claims that the legal framework in 1956 "allowed for abortion on medical grounds, in the case of a pregnancy resulting from a crime, but also due to the «difficult living conditions» of the pregnant woman (Art. 1, Sec. 1). The requirement to document the «difficult conditions» was soon dropped and in fact abortion was available on request." However, she goes on to argue that the stance towards abortion became more and more conservative due to the influence of the Church. Polls conducted by the Public Opinion Research Centre (CBOS) in 2016, showed a wide range of results. The support for abortion on request had decreased from 27 to 14% Instead, the support for abortion due to a danger to the woman's life never decreased below 77% and abortion for a pregnancy resulting from a criminal offence never decreased below 72%. 75–76% of the respondents opposed abortion due to material circumstances (CBOS, 2016). Yet, 53% of the respondents supported abortion due to foetal impairment (Bucholc, 2022, pp. 73–99). She claims that this contrast is due to the pro-choice Black Protest and its "strong influence on the acceptance of abortion" (Bucholc, 2022, p. 84). The Polish Constitutional Tribunal in 2020, in a landmark decision (Case K 1/20), held that abortions arising from foetal abnormalities are unconstitutional, thereby affirming foetal personhood (*Family planning*..., 2020). This decision notwithstanding, Marta Bucholc and Marta Gospadarczyk (2024, pp. 103–110) have noted that, after a poll carried out in February 2024, "62 per cent and over 90 per cent of the ruling coalition's voters were in favour of allowing abortion up to the twelfth week of pregnancy."[1] I would submit that this could be the response to the 2023 decision *M.L. v. Poland* of the European Court of Human Rights. The Court held that Poland's restrictive abortion legislation had infringed upon "the applicant's

[1] Since December 2023, Donald Tusk has been the prime minister of four-party coalition government (Civic Platform, New Left, Poland 2050, and the Polish People's Party).

rights to privacy by denying her access to an abortion and forcing her to undergo it abroad" (Bucholc, Gospodarczyk, 2024, p. 109).

Although the speech of the former politician Robert Winnicki's happened in 2016, it perfectly encapsulates this mood. Great Britain was Robert Winnicki's target, because "sex education and contraception are widely available from an early age. What are the statistics? You said that the point is not to let teenagers get pregnant. The statistics are as follows: 21,000 teenage pregnancies in Poland in 2011, 95,000 in the UK" (Zuk, Zuk, 2020, pp. 566–588). Winnicki also mentioned HIV infection rates. As far as HIV infections are concerned, he claimed they are "*2*.39 per100,000 in Poland and 13.26 in Great Britain. You could multiply these examples, statistics" (Zuk, Zuk, 2020, p. 583). The conclusions are that

1. Great Britain and its alleged promotion of sex education is gender propaganda. According to Judith Butler (2024, p. 7), gender is conceived of as "the devil itself, all those that represent gender must be expelled from humanity." Alexander Alekseev (2024, pp. 1–2) emphasizes this point by arguing that "all non-native elements (…) are (…) conceived as a fundamental threat to the homogeneity to the nation."
2. Britain's numerous cases of HIV as a result of sexual freedom will never happen in Poland. Apart from homophobic rhetoric, Winnicki manages to stoke fear. HIV infections are lower in Poland, since sex education will never be taught.

As I have shown in the previous sections, perceived threats to the Protestant United States of America from Roman Catholicism were the backbone of nineteenth-century religious propaganda. Genderism, as Judith Butler terms the phenomenon, and abortion, the leftovers of Marxism, threaten Pole-Catholicism. Hofstadter (1964, p. xii) would have claimed that this is the response to a "hedonistic mass culture and by the moral laxity that has grown up with and is charged to our liberal and relativistic intellectual climate."

Conclusions

In this article, I have made an innovative use Richard Hofstadter's notion of paranoid politics as an effective alternative to the Weberian disenchantment paradigm. By historicizing disenchantment, I have shown how the Hof-

stadterian paranoid style characterize the USA and Poland. President Trump frequently uses the trope of the witch hunt to justify his (supposed) persecution and uses the Puritan interpretation of kingship to appeal to conservatives. In Poland, PiS stoked fear about Marxism, which is responsible for genderism and abortion. Ultimately, by historicizing the disenchantment paradigm, I have shown how a supposedly desacralized world has instead produced the paranoid re-enchantment of the world.

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Local Particularism in the Visual Identification of Cities and Communes in Poland

Abstract

The theory of territorial marketing theorizes that no locality exists in isolation; there are invariably vertical relationships (country-region-district-commune) and horizontal relationships (e.g., between regions). Within the context of this theory, an inquiry emerges regarding the extent to which the brands of cities and communes in Poland adhere to these recommendations. An examination of the logo content of all cities and communes in Poland that have adopted visual identification as part of their marketing strategies reveals a predominance of local particularism in visual identification. This phenomenon accounts for the lack of coordination of messages across local, regional, and national levels. This issue is significant as it leads to an absence of clear identification of the sender (local/regional government unit) and complicates the interpretation of the symbolic content of the sign within the framework of regional and national identification. Furthermore, a challenge identified within Poland's territorial marketing involves regional and subregional identifications as well as cross-border brands with distinct visual identities. Consequently, logos intended to convey the distinctiveness of a location and to differentiate it from others fail to accomplish these objectives.

Keywords: visual communication, visual identity, territorial marketing, place branding, coopetition

Lokalny partykularyzm w identyfikacji wizualnej miast i gmin w Polsce

Abstrakt

Teoria marketingu terytorialnego zakłada, że żadna jednostka przestrzenna nie funkcjonuje w oderwaniu – zawsze istnieją pionowe zależności (kraj–region–powiat–

gmina) oraz relacje poziome (np. między regionami). W tym kontekście nasuwa się pytanie, w jakim stopniu marki miast i gmin w Polsce realizują te założenia. Analiza treści logotypów wszystkich miast i gmin, które wdrożyły identyfikację wizualną w ramach swoich strategii marketingowych, ujawnia dominację lokalnego partykularyzmu. Zjawisko to skutkuje brakiem koordynacji przekazu pomiędzy poziomem lokalnym, regionalnym i krajowym. Ma to istotne konsekwencje: prowadzi do nieczytelności nadawcy komunikatu (jednostki samorządu terytorialnego) oraz utrudnia interpretację symboliki znaku w kontekście identyfikacji regionalnej i narodowej. Dodatkowym wyzwaniem w polskim marketingu terytorialnym są tożsamości regionalne, subregionalne oraz marki transgraniczne, które posiadają odrębne systemy wizualne. W efekcie logotypy mające podkreślać unikalność miejsca i odróżniać je od innych nie spełniają tych funkcji.

Słowa kluczowe: komunikacja wizualna, identyfikacja wizualna, marketing terytorialny, *branding* miejsca, koopetycja

Introduction

In the literature on Place Branding (PB) and Place Marketing (PM), it is postulated that territorial brands should spatially cooperate vertically (e.g., country-region or region-local community) and horizontally (e.g., regions with each other) (Pasquinelli, 2011; Cleave, Arku, 2014; Michaelis, Alfasi, 2022). Regardless of the criticism related to the main concept of brand (Gaski, 2020), territorial branding is a subdiscipline of branding, so it uses the main theoretical concepts distinctive for this discipline. According to branding (De Chernatony, 2006) and marketing theories (Hunt, 2015), the subsequent theses are relevant to the content of the article:

1. It is generally acknowledged that a brand encompasses two distinct, yet interrelated aspects: identity, which relates to expressions, and image or reputation, which involves the perceptions of recipients (Kapferer, 1994).
2. Territorial brands are conceptualized as comparable to corporate brands (Kerr, 2006; Florek, 2021).
3. The visual identity of territorial brands is expressed through the logo content that represents the region, city, county, or municipality (Adamus-Matuszyńska, Dzik, 2017).

Within the context of brand typologies, scholarly discourse identifies four potential structural frameworks: 1) a monolithic or “branded house” struc-

ture; 2) an approved architecture; 3) a hybrid configuration and 4) a pluralistic model or "house of brands" (Wheeler, Meyerson, 2024, p. 19). Taking into account the specificities of territorial branding, a monolithic brand configuration is feasible for basic Local Government Units (LGUs), which in Poland are referred to as communes. In the realm of spatial cooperation, alternative solutions exist as theoretical possibilities. Poland represents a noteworthy theoretical exemplar, attributable to its decentralized territorial system (Piasecki, 2009). Practically, this decentralization denotes that both horizontal territorial cooperation (such as inter-communal collaborations) and vertical cooperation (such as partnerships between communes, counties, and provinces) are conducted voluntarily and operationalized through agreements. This inquiry facilitates the formulation of a research question: To what extent does the visual identity of various regions/cities/communes correspond to the visual identity of the Polish national brand and to what extent does the visual identity of local brands correspond to the visual identity of regional brands?

Theoretical background

In light of the proposed interconnections (cooperation and/or synergy) among various territorial brands alongside legal restrictions and their competitive interests, the formulation of a unified national or regional brand policy is unfeasible, while implementing an isolated brand policy lacks advisability. Recognizing the concurrent necessity for cooperation, given the evident premise that no territory operates in isolation, and the competitive dynamics detailed in the relevant literature, the theoretical framework for further analysis is grounded in the concept of coopetition (cooperation + competition). Within the realm of management sciences, this concept has gained significant research attention in the transition between the twentieth and twentieth centuries (Dorn, Schweiger, Albers, 2016; Chim-Miki, Fernandes, Monticelli, 2024). As demonstrated by the reviews of the cited literature, the definition of coopetition, as articulated by Bouncken, has been embraced (Bouncken, Gast, Kraus, Bogers, 2015, p. 591): "Coopetition is a strategic and dynamic process in which economic actors jointly create value through cooperative interaction, while they simultaneously compete to capture part of that value."

In the domain of Place Branding (PB), this issue is observed in various contexts, such as cooperation between researchers and practitioners (Mabillard, Vuignier, 2021), interactions with stakeholders (Martinez, 2016), the establishment of business clusters within regions (Giuffre, 2023), and spatial cooperation (Taecharungroj, Kompaniets, 2024). However, there is a noticeable gap within the literature, which adopts a monolithic view of "cities and regions in competition" (Pasquinelli, 2015, p. 4), thus overlooking the potential subtleties of place branding policy in the realm of cooperation. Regarding cooperation, there are two primary approaches: the network approach and the brand-side approach (Pasquinelli, 2015). The network approach focuses on management and is concerned with organizational processes, whereas the brand-side approach addresses the symbolic dimension, that is, the analysis of processes aimed at establishing a collective brand identity for its members, ultimately leading to a unified image. This raises the question of what dynamics underlie brand building when adopting a relational perspective on the symbolic associations that constitute collaborating brands. This involves examining the relationships forged between all foundational brands and the potential unified brand.

Relying on theoretical foundations and analyses, it is postulated that identifiable linkages are likely to exist among territorial brands within the same nation. By recognizing the difference between brand identity and brand image, this article focuses on the visual identity of cities and communes selected for presentation within one voivodship in Poland.

A decade of scholarly investigation conducted by the authors of the present discourse suggests that there exist four potential model solutions among LGUs (Adamus-Matuszyńska, Dzik, 2020; 2022a; 2022b). The research undertaken facilitated the identification of two distinct characteristics of visual identity branding projects, contingent upon their longevity and focus concerning the capacity of issues promoted by a given Local Government Unit (LGU). The visual identification of a location within a regional or national context can be delineated along the axis of duration (temporary or permanent) and scope (specialized or general). The term "temporary" denotes an initiative (activity, project) with an established end date from its commencement. For example, the "Eastern Poland" project, as detailed subsequently, was implemented from 2009 to 2015 (Augustyn, Florek, 2015). In contrast,

the term "permanent" refers to a program type that concentrates on continued incremental improvements without a defined conclusion. Specialized visual identity projects emphasize the promotion of a singular issue (such as investments or tourism), whereas general projects strive to encompass all dimensions of a location. This categorization enables the identification of the various projects aimed at constructing the visual identity of the place being promoted:

1. Temporary and specialist. Within the Polish context, these include tourism promotion initiatives, exemplified by the case of the so-called Eastern Poland (Augustyn, Florek, 2015), or instances of prolonged collaboration, predominantly related to investments in the utilities sector as observed in examples such as integrated territorial investments.
2. Temporary and general. An example may be the so-called Regional Operational Programs of the voivodeships, which cover a wide range of investment, educational, promotional and other tasks, generally serving the development of the region.
3. Permanent and specialist. These represent enduring collaborations focusing on, for instance, a collective tourist offering or the administration of utilities infrastructure, such as water supply networks extending across multiple municipalities.
4. Permanent and general. These pertain to extended collaborations that encompass a wide range of issues.[1] In the case of the Silesian Voivodeship, an example may be the four subregional associations.[2] Their strategic documents, regulations, and statutes describe a wide range of issues that these associations deal with.

The presented research endeavours to examine the identity of territorial brands by considering the final option, namely, permanent and general coopetition. This choice is justified considering at least two methodological notes. First, temporary visual identity projects, both specialized and general should not be associated with permanent bonds of the local government unit brand identity. Such an assumption results from both the practice of market-

[1] http://regioresovia.pl (14.01.2025).

[2] Cf.: subregion.pl, subregioncentralny.pl, subregion-polnocny.pl, aglomeracja-beskidzka.pl.

ing practitioners and theoretical and methodological analyses. Second, permanent and specialized projects (for example, joint, inter-municipal water and sewage networks) are excluded from further analysis because they are most often managed by separate structures, for example, companies in which municipalities have specific shares. As the authors' research and consulting experience shows, such companies most often have their own brand identification. Such distinctiveness results from a practical reason – the customer of such an example service operator must be aware of who provides such a service, to whom to pay fees and where to report complaints or failures.

Considering the methodological reservations, it can be postulated that the visual identity of local government entities, both in terms of vertical linkages (encompassing country, region, district, and commune) and horizontal linkages (for instance, among regions), necessitates adherence to the criteria of durability (requiring permanence) and universality (requiring generalization), as these characteristics will ensure coopetition.

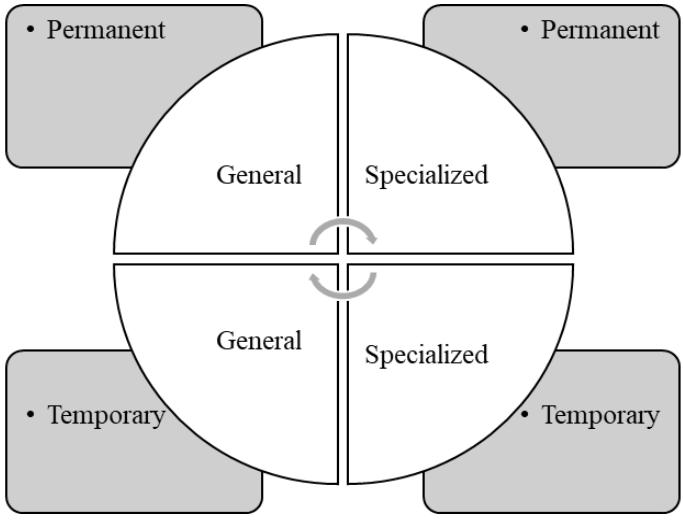

Figure 1. Analytical Model of Place Brands Cooperative

Source: Authors' own elaboration based on previous research work: Adamus-Matuszyńska, Dzik (2017, pp. 336–337); Paasi (1991); Boisen, Teerlouw, van Gorp (2011).

Research methodology

The study of the authors reveals that in Poland, 2877 Local Government Units (LGUs) comprising 16 regions, 314 rural counties, 66 cities with county rights and 2477 communes employ approximately 1000 brand identities. The use of "approximately" is justified by the impermanence of these identities, since the number of modifications during the study period (2011–2024) was multiple (Dzik, Adamus-Matuszyńska, 2024). Considering the theoretical assumptions, comparative analyses (Adamus-Matuszyńska, Dzik, 2022a), and the substantial number of identities, the research methodology delineated in this article involved two steps: 1. Selection of cases for analysis; 2. Undertaking an examination of territorial brand identity using the content analysis method, in a variant customized for visual analyses, as Konecki (2012, p. 13) underscores, highlighting the necessity to consider the visual and/or visual data dimension of actions when actions/interactions and identities are visually constructed.

The Silesian Voivodeship was selected for analysis due to its distinct features: cultural diversity, variations in historical heritage, and contradictory forms of industrialization (Smolorz 2012). An additional justification for investigating potential connections between the region (voivodeship) and the counties (poviats) and communes stems from the fact that the "Poland" brand does not exist as a coherent project, thus complicating the analysis of the LGU logos in relation to the nation-state (Kukliński, Pawłowska, 1999; Hereźniak, 2011).

In the second stage, according to Hunt's theory of marketing research (Hunt, 2015), the inductive approach was employed in this study. This approach postulates that the initial phase involves the observation and documentation of data (Hunt, 2015, p. 27). However, as Hunt states (2015, p. 27): "data are never a priori relevant or irrelevant to a problem (…) Rather, data can only be a priori relevant or irrelevant to hypotheses (however crude or tentative) concerning certain phenomena."

Taking into account the above reservation and the research question formulated in this article, the authors focused on the observation and documentation of the LGU logos of the cities and communes in the Silesian Voivodeship.

Content analysis was used to investigate both logos and coats of arms. It is recognized as a methodological approach that includes both qualitative and quantitative research. Its originator, Berelson (1952), defined it as the objective, systematic, and qualitative description of the content communicated. This method is considered a legitimate research approach for place branding (Hashim, 2017). The content analysis of promotional graphic symbols is comprised of four stages (Rose, 2016, pp. 88–99):

1. Identification of images: The logos of the self-governing entities were sourced from official websites, social media platforms, and various promotional materials. Researchers additionally engaged officials for interviews to clarify ambiguities pertaining to the content's significance.
2. Development of coding categories: Coding involves the assignment of descriptive labels (or categories) to the images (Rose, 2016, pp. 92–95).
3. Coding of the images: Implementation of specified categories (consistent with Baur's typology) to the logos of places.
4. Analysis of results: Drawing conclusions and conducting a discourse on the questions.

Employing a qualitative thematic coding methodology, a categorical framework was established for the classification of the examined logos. A content analysis approach was used to scrutinize and evaluate the images depicted in the amassed logos of local and regional government units in Poland.

Research procedure

Initially, the logos of the Local Government Units (LGUs) were identified through official websites, social media platforms, and various promotional materials. In instances where uncertainty arose, researchers directly engaged with the respective officials to seek clarification. This supplementary verification process encompassed more than twenty cases.[3] Research has been ongoing since 2011 as part of a longitudinal study, with logo verification conducted quarterly. All logos have been systematically compiled into a database and subsequently analyzed using both quantitative and qualitative methodologies. The data discussed in this article pertain to the period of September to December 2024.

[3] Logos with reference to region or nation are presented in Annex 1.

Integration of the second and third stages of the procedure was facilitated by the application of an established taxonomy. Through the use of a qualitative thematic coding methodology, Baur's categorical framework was implemented to code and classify the logos examined. The main category identified was "logo situating a place with respect to the nation." This taxonomy was selected for its demonstrated efficacy, integrative of graphic design, heraldry, and insights from various social sciences, and its author explicitly addresses the relationship between the graphic symbols of different LGUs (Baur, 2013, pp. 76–77).

Baur's original taxonomy contains nine categories:

1. The logo makes direct use of the coat of arms.
2. The logo is inspired by the coat of arms.
3. The logo is in harmony with the coat of arms.

The above three categories are excluded from the analysis because the author clearly describes the connection between the logo and the coat of arms of a given LGU (for example, in the Silesian Voivodeship, the logo of Rybnik is inspired by the coat of arms of that city).

4. Logo situating a place with respect to the nation.

These symbols are included in a further detailed analysis. They can be utilized to read location indications (e.g., on a map, using a slogan), the use of national or regional colors, and references to the logo of a higher-level territorial unit.

5. Logo based on the initial letter of the place.
6. Logo based on a monument.
7. Logo based on singular geological feature.
8. Logo based on a singular historical feature.
9. Logo based on an atmosphere.

The descriptions and examples contained in the original work clearly indicate that only the type 4 logo shows or may show connections with other LGUs. The concluding phase involved the analysis and presentation of the results.

Results

Within the Silesian Voivodeship, a significant proportion of local governmental entities implement visual identification strategies. Among 19 cities endowed with county rights, 16 employ a logo; from 17 rural counties,

8 adopt a logo; and out of a total of 167 municipalities, 74 make use of a logo. The recognized content of the logo according to Baur's typology is shown in table 1.

Table 1. Content of the logos of cities and counties of the Silesian Voivodeship according to Baur's typology.

No	The relationship between the content of the logo and the coat of arms	Logo content features	Numer
1.	Logo associated with the coat of arms	The logo makes direct use of the coat of arms	0
2.		The logo is inspired by the coat of arms	6
3.		The logo is in harmony with the coat of arms	7
4.	Logo not related to the coat of arms	Logo situating a place with respect to the nation	2
5.		Logo based on the initial letter of the place	10
6.		Logo based on a monument	7
7.		Logo based on singular geological feature	7
8.		Logo based on a singular historical feature	7
9.		Logo based on an atmosphere	27
10.		Abstract logo	9
11.		Logotype	16
	Altogether		98

Source: Authors own elaboration.

The Silesian Voivodeship exhibits considerable diversity, as evidenced by the logos analyzed, which are designed to distinguish the region from others. Each entity within this voivodeship highlights through visual symbols what is deemed important and significant. None of the symbols makes reference to the values and symbols, namely practicality, energy, consistency, and cooperation, as described in "The Silesia Voivodeship 2014–2018 Communication Marketing Strategy" (DEMO Effective Launching, 2013). It should also be noted that the logos analyzed have touristic significance, with the aim of displaying features important to the local community.

Logos are inherently competitive, their distinct characteristic being the symbolic rivalry between local government units (LGUs) situated in close geographical proximity, competing for analogous resources or social demographics. It is important to observe that there exists a notable diversity in the symbols used. LGUs within the Silesian Voivodeship do not derive inspira-

tion from the visual identity of the region, with the notable exception of Częstochowa, which incorporates the colours of the regional coat of arms. A further conclusion resulting from the analysis of the symbolic content within this Voivodeship pertains to the absence of representations of the industrial heritage, which is a defining characteristic of the region, with the solitary exception of the Czerwionka-Leszczyny commune logo. This observation is of particular importance, given that the region's flagship product is the "Technical Monuments Trail," along which nearly every commune features at least one monument related to industry and/or industrial heritage. Moreover, certain Local Government Units (LGUs) incorporate post-industrial sites in their promotional efforts (e.g., Zabrze – Guido mine, Tychy – Browarium, Bielsko-Biała – Museum of Technology and Textiles). Connections with the region manifest primarily in the "locational" logos, exemplified by representations of a geographical setting in the case of Olsztyn, or depictions on a national map as seen with Knurów. The Bieruń logo, which uniquely incorporates the Silesian language, represents a notable example. In relation to the research issue examined within the article, it is imperative to acknowledge that one of Poland's oldest visual identities, the regional "Śląskie. Pozytywna Energia," is confined to use within areas or institutions directly under the jurisdiction of the Marshal's Office. The aforementioned subregional associations are an example. Only two of them (the western and central subregions) refer to the voivodeship logo in their identification. The significance of this situation stems from the fact that the task of these associations is, among other things, coordinating projects financed by the voivodeship authorities. Another example is the permanent, general project of the Upper Silesian-Zagłębie Metropolis (Górnośląsko-Zagłebiowska Metropolia – GZM). This association of 41 LGUs has been operating since 2017 on a legal basis. The Metropolis has its own visual identification system.[4] This system assumed the adaptation of the identification of local governments – members of the GZM – to a common identification (see Annex 2). In 2024, this adaptation is not used; local governments use their own logos.

Furthermore, it has been noted that the insignias of the communes forming part of rural counties do not reference the logo of GZM. The primary challenge resides in interpreting the inherent significance of the territorial

[4] https://bip.metropoliagzm.pl/uchwala/124966/uchwala-nr-25-2019 (17.01.2025).

symbols under examination. Do these logos represent the territory itself, its governance, or a particular offering, such as tourism attractions? Ultimately, there exists an evident ambiguity regarding the function of these unique symbols, coupled with a disregard for their role in disseminating information to citizens (the case of Myszków city's visual identification, integrating brand identity with the municipal information system in a unified graphic format, could be considered an exception). In considering this function of resident notification genuinely, it is crucial to recognize that the issue transcends the framework of an individual Local Government Unit (LGU), relating more broadly to the interpretation of public institutions as a whole. This issue hinges on the equivalency of communication: when all communes within the region "communicate", the recipients encounter difficulties in interpreting the relationships and responsibilities associated with various territorial entities, including communes, counties, and voivodships. In Bouncken's definition of coopetition, as cited in the introduction, the term "value" is invoked. Brand value and brand equity represent two different, yet intricately linked, concepts. Both notions are extensively addressed in branding theory (Kubuj, 2022). Brand value is defined as the worth of a brand to management and shareholders, encompassing both asset value and symbolic significance (Jones 2005). Brand equity can also be understood through the lens of the brand's financial value. Notwithstanding debates concerning the understanding and quantification of these concepts (Avis, Henderson, 2022), it is commonly accepted that brand equity is divided into two dimensions: real, which refers to tangible resources available in the market, such as land or infrastructure (i.e., financial value), and symbolic, which is associated with the brand's identity, image, and reputation. Applying these concepts to the current research, it can be concluded that competition among LGUs of the Silesian Voivodeship manifests in both the tangible and symbolic realms, while cooperation predominantly takes place in the tangible realm, with a notable absence in the symbolic realm. Joint projects, regardless of whether they are temporary or permanent and what their scope is, are provided with separate visual identities, unrelated to the basic identifications of the participating communes and counties. This is a situation that can hardly be described as paradoxical. Brand identities that serve to both individualize and unite coopetition actors can indeed be developed, as evidenced in Baur's referenced article and its proposed designs for the logos of French regions, de-

partments, and communes. Similar systems are evident in local government heraldry (Znamierowski, 2017). The dilemma posited by Beyrow and Vogt (2014) regarding a singular local government unit – whether to adopt one logo or multiple – also extends to their horizontal and vertical cooperation. The authors posit that in cooperation anticipated to be permanent, multiannual, or long-term, a symbolic system congruent with the sphere would be advantageous for participants, stakeholders, and the broader market and institutional milieu. However, this remains a hypothesis necessitating further investigation.

Limitations of the study and future research directions

The researchers are in the process of completing a comprehensive statistical analysis that includes Poland as a whole, using the Baur taxonomy (Baur, 2013). Preliminary findings substantiate the hypothesis that logos with reference to visual symbols of region and nation are exceedingly rare; of the 956 logos evaluated, only 20 were identified, with the majority categorized as "locational" logos. This observation may suggest challenges related to the coordination and promotion of collaboration between Local Government Units (LGU).

Approximately 40% of the local government units in Poland use logos to communicate with their external environment. Consequently, the study of local government heraldry emerges as a significant area of research. An illustrative case is the heraldic framework of the Małopolska Voivodeship, where the coats of arms of the counties are aligned with that of the region (Widłak, 2007). According to Znamierowski (2017), Portugal demonstrates a well-structured local government heraldry system, thereby facilitating subsequent discussions on international comparisons.

Ultimately, content analysis is influenced by the subjectivity inherent in researchers' perspectives. Consequently, it is crucial to ascertain the perception of specific content by various target groups (such as residents, tourists, businesses, etc.). This consideration directs attention towards the final focus: studies on perception (for instance, the perception concerning whether a particular municipality is regarded as part of the region).

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Annex 1. Logos of municipalities and counties with references to the region (Silesia Voivodship) or nation (Poland)

Logo	LGU/reference	Logo	LGU/reference
Śląskie. Pozytywna energia	Voivodeship logo since 2003. From 2018 mostly utilized for tourism promotion	Olsztyn Słońce Jury	Olsztyn. The slogan refers to the geo-graphical region that is part of the voivodeship.
CZĘSTO CHOWA	Częstochowa logo. Graphic element refers to Silesian coat of arms (gold and blue).	KNURÓW zawsze po drodze	Knurów. Logo utilizes the city location in Poland.
Zabrze w sercu Śląska	Zabrze logo. Tagline says: In the heart of Silesia	Woźniki Zielony Śląsk	Tagline "Green Silesia."
BIERUŃ CI PRZAJE	This is the only logo where the Silesian language is used in the tagline. Tagline can be roughly translated as "Bieruń loves you."	CZERWIONKA-LESZCZYNY ZŁOŻA SUKCESU	Czerwionka-Leszczyny. This is the only logo referring to industrial heritage of the region.
POWIAT MYSZKOWSKI w samym sercu Jury	Mikołowski county (poviat). The slo-gan refers to the geographical re-gion that is part of the voivodeship.		

Source: Authors' elaboration.

Annex 2. Silesia Metropolitan (GZM) identification system

Source: an attachment to the GZM resolution 224/2018 (9.11.2018).

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Welfare or Wellbeing – Sustainability Aspects in Competitiveness

Abstract

In the mainstream economics, the concept of competitiveness is connected to basic economic indicators such as GDP or productivity. The realization that environmental aspects cannot be left out of the competition for consumers was born a long time ago, but company managers cannot integrate new aspects overnight – neither in production nor in their way of thinking. For this reason, it is not surprising that competitiveness and sustainability are only loosely connected in the minds of managers, and they experience the same in the case of their own consumers. This is a joint development, where company and consumer change at the same time, changing their values and priorities. In addition to corporate responsibility aspects, the same attention must be paid to basic competitiveness indicators, such as innovation, marketing activities, and efficient production. These are often not so simple, since many external factors influence and sometimes hinder the process, such as corruption or the uninitiated legislative environment.

Keywords: sustainable development, competitiveness, prosperity and well-being, corporate social responsibility, shifting consumer values, innovation, strategic management

Dobrobyt czy dobrostan – aspekty zrównoważonego rozwoju w kontekście konkurencyjności

Abstrakt

W głównym nurcie ekonomii pojęcie konkurencyjności wiązane jest z podstawowymi wskaźnikami gospodarczymi, takimi jak PKB czy produktywność. Już od dawna dostrzega się jednak, że aspekty środowiskowe nie mogą być pomijane w rywalizacji o konsumenta. Mimo to menedżerowie firm nie są w stanie z dnia na dzień zintegrować nowych czynników – ani w procesach produkcyjnych, ani w swoim sposobie myślenia. Dlatego też nie dziwi fakt, że konkurencyjność i zrównoważony rozwój pozostają

w świadomości menedżerów słabo powiązane – podobnie zresztą jak w percepcji samych konsumentów. Mamy tu do czynienia z równoległym procesem zmian, w którym zarówno firmy, jak i konsumenci przekształcają swoje wartości i priorytety. Oprócz aspektów odpowiedzialności społecznej przedsiębiorstw niezbędna jest także koncentracja na tradycyjnych wskaźnikach konkurencyjności, takich jak innowacyjność, działania marketingowe czy efektywna produkcja. Wdrożenie tych zmian często bywa jednak skomplikowane, ponieważ na proces wpływają liczne czynniki zewnętrzne, jak korupcja czy niespójne i nieprzygotowane otoczenie legislacyjne.

Słowa kluczowe: zrównoważony rozwój, konkurencyjność, dobrobyt i dobrostan, odpowiedzialność społeczna przedsiębiorstw, zmiany wartości konsumenckich, innowacyjność, zarządzanie strategiczne

Introduction

Research on competitiveness of countries hardly includes environmental protection aspects among the criteria for measuring competitiveness, while environmental sustainability should be one of the unavoidable indicators of competitiveness. Not only because consumer expectations increasingly prioritize environmentally friendly solutions, but also because economies whose businesses do not take into account scarce natural resources cannot be competitive in the long term. Despite this, international institutions dealing with competitiveness started to integrate sustainability aspects into the indicators of competitiveness not so long ago. Starting from 2019, World Economic Forum incorporated sustainability aspects into its Global Competitiveness Report (WEF, 2020). New indicators take into account environmental sustainability, including countries' climate protection strategies, environmental regulations and resource efficiency. The IMD World Competitiveness Yearbook is also increasingly paying attention to sustainability (IMD, 2024), although this is not its main focus. However, environmental aspects such as the development of green energy, reduction of CO_2 emissions, and the commitment of countries to sustainable development appear in the latest reports. Many OECD reports also focus on sustainability. OECD environmental reports, such as Green Growth Indicators (OECD, 2017; 2024a) and Environmental Performance Reviews (OECD, 2024b) are directly related to countries' competitiveness. OECD economic analyses often examine sustainability, particularly in the areas of energy production, carbon emissions and sustainable urban

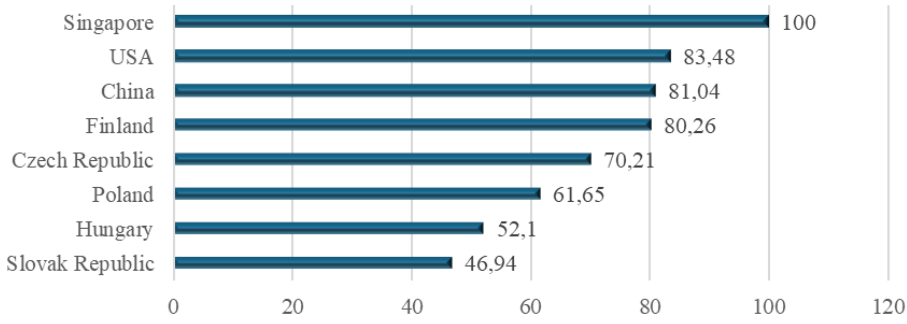
development. World Bank also incorporates sustainability aspects into the economic evaluations of countries (WB, 2024). encourages green growth and the transition to sustainability. Meanwhile, it often examines the impact of environmental protection policies on competitiveness. The competitiveness reports of the European Commission (EU, 2024) pay special attention to environmental sustainability. When evaluating EU member states, the Green Deal and other sustainability initiatives are given priority. The European Commission integrates sustainability goals into competitiveness policies.

It takes some time for new aspects to appear in corporate thinking. In the beginning, motivation is always external, and its spread is typically slow. The biggest driving force is clearly the consumer preference, since the company wants to meet the consumers' ideas about its products and services, but it must achieve all this in such a way that (cost) efficiency of its activities does not decrease. They therefore need solutions that create a beneficial situation for both consumers and companies. Over time, these solutions become integrated into corporate thinking, become natural, and start to function as an internal driving force for further such steps forward.

On the other side, there is the consumer, who also needs time to change his attitude (Garai-Huszák, 2024) and is influenced by many external factors. On the road to sustainability, companies and consumers walk together, take a series of small steps, sometimes need to correct the direction, while the speed is not constant.

Naturally, the competitive situation of any economy is influenced by many external and internal factors, which is why competitiveness can also be measured with various indicators. For example, IMD uses four factors as a basis for measuring competitiveness: economic performance, government efficiency, business efficiency, and infrastructure. These factors include indicators such as macroeconomic stability, fiscal policy, institutional quality, market openness, business dynamism, innovation, education, health, and environmental performance. The World Competitiveness Ranking features 20 such sub-factors. These 20 sub-factors comprise 336 criteria altogether.

In the following graph, based on the IMD ranking, we see the aggregated competitiveness index of some countries, where in the comparison, we took the most competitive country, Singapore, as 100%, and compared all other countries to it.



Graph 1. Aggregated competitiveness index of some Central European countries

Source: IMD World Competitiveness Yearbook 2024.

Thus, competitiveness of an economy as a whole consists of a business environment favoring competitiveness (legal environment, policies, institutions, stability, etc.) and the very competitiveness of companies thriving in it. The latter is maintained via innovative activities (Varga, 2023a), that is in effect beneficial for not only the companies themselves, but also for other companies and the economy as a whole. Therefore it is of utmost importance to clarify which policies, regulations and other macroeconomic instruments are viewed by businesses as the most favorable for boosting innovative efforts (Csiszárik, Varga, 2023).

Business environments supporting creativity and innovation, which harnesses it, (Blaskovics, Czifra, Klimkó, 2023) include multiple factors, such as economical stability, efficiency and soundness of policies, legal environment, etc. This all is complemented by internal factors of innovative management within companies, like market strategies (as for market position, geographical reach, etc.), views on functional elements of competitiveness, especially innovation, (Dobos, Csiszárik, 2023) relation to technological advancements, views on consumer expectations and their importance, and many more factors. These all will be investigated to some extent in order to get a comprehensive picture on the competitive potential of the ecosystem of businesses in our reach.

Of the internal factors, sustainability is investigated the most thoroughly in our paper. It must become a staple element in the discourse about competitiveness, just because the larger economical systems we examine, the

stronger long-term competitiveness will be connected to sustainability. Small businesses can thrive in the short term very efficiently without any respect to sustainability, or even using traditional "race-to-the-bottom" strategies against sustainability, but zooming out to the global level and to the long term it becomes self-evident that sustainability is strictly required to any kind of competitiveness (this also calls for cooperativity, (van Horen, van Wal, 2018; Austen, 2018) a strange but true concept in a paper about competitiveness). While the widespread understanding of this is yet to prevail, we handle obligations of sustainability distributed across every actor of the economy as a key element of long-term competitiveness. (Globocnik, Rauter, Baumgartner, 2020) It appears, however, on the short term too: as a part of expectations from more and more conscious consumers, or other opportunities coming from e.g. sustainability policies which can be turned into corporate advantage. (Shen, Sha, Wu, 2020)

As for the external factors of competitiveness, we point out the importance of the legal environment and the presence of corruption in the socioeconomical system in question. While a business-friendly regulatory framework of the economy can be a serious improvement to the competitivity of its member entrepreneurships, an inefficient legal environment can be similarly detrimental to them. Note that the presence of corruption is an issue where the questions of competitivity and sustainability meet once again: while corruption can be a strategy of prevailing for individual businesses, it is one of the most serious problems of the overall competitiveness of the whole economy, as well as an important factor of the societal sustainability of the underlying society (Monterio, Vianna, 2018).

Material and methods

During my investigations, I conducted a questionnaire analysis among Hungarian enterprises. I was primarily interested in the correlation between competitiveness and environmental protection activity. The survey was conducted online between October 1 and 10, 2024 with the help of university students. 401 companies were reached.

My questionnaire analysis which aims to study the perception and handling of the above questions in Hungarian enterprises, aims to primarily

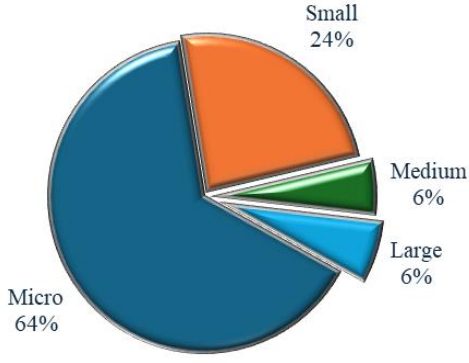
check three preliminary suppositions among all the issues and details that have been investigated.

1. Hungarian enterprises see the shift towards sustainable practices in a somewhat oversimplified way: they regard the lack of financial subsidies and tax reduction as the chief obstacle in this direction.
2. Hungarian enterprises do not perceive relevant interdependence between competitivity and the sustainability of their activities. This may be based upon their perception of consumer indifference with regard to the same question.
3. Managers of Hungarian enterprises see corruption as the major obstacle coming from external effects against their competitiveness.

Results

Basic data

The companies participating in the survey mostly operate in Pest County, including Budapest (aka Central Hungary NUTS region). In terms of their size, the largest proportion of participants were micro-enterprises (64%), then small enterprises (24%), medium-sized enterprises (6%) and large enterprises (6%). The following graph shows the size distribution of the responding companies.

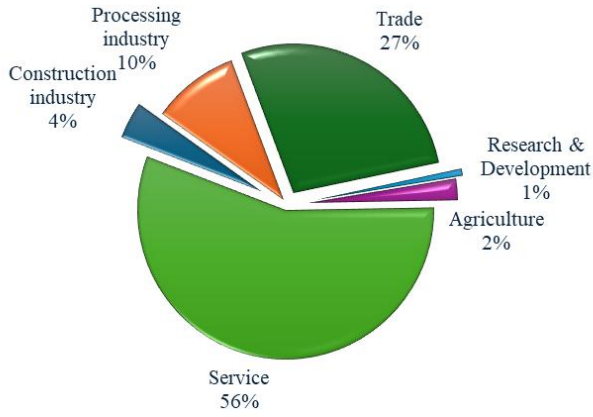


Graph 2. Size of the enterprises

Source: self-edited graph based on primary data.

In order to facilitate classification, the questionnaire specified the size categories for the number of employees and annual income.[1] However, according to my experience, the respondents chose the given category even if only one of the two criteria was met. For this reason, the question about the annual turnover of the companies showed slightly different results, according to which 77% of the companies have an annual turnover of less than 2 million euro, 14% 2–10 million euro, 5% 10–50 million euro and 4% over 50 million euro.

The location of business activity is local for 39% of the companies, 44% operate on a national level and 17% on internationally. Regarding the areas of activity, more than half of the responding companies (56%) work in the service sector, 27% carry out commercial activities, 10% strengthen the manufacturing industry, 4% are active in the construction industry, 2% belong to agriculture and 1% to research for development.



Graph 3. Sectoral distribution

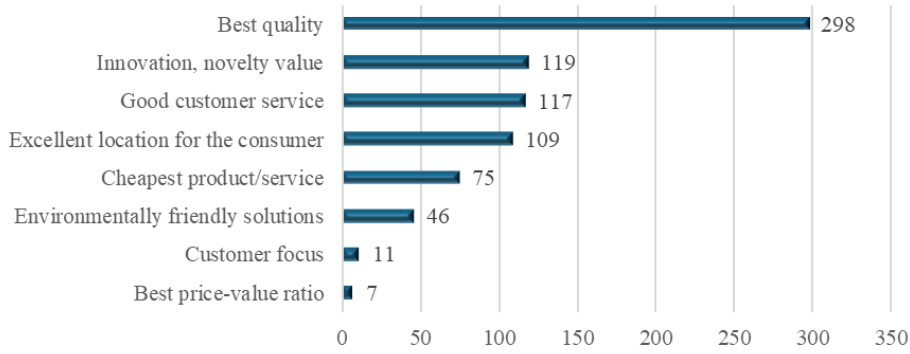
Source: self-edited graph based on primary data.

Only 6% of the companies are among the market leaders, 14% classified themselves in the "significant but not leaders" category, while 42% of the responding companies have a market share smaller than the share of most competitors.

[1] Number of employees: Micro < 10, Small < 50, Medium < 250, Large > 250 Turnover: Micro < €2, Small < €10, Medium < €50, Large > €50.

Innovation as a competitive advantage

As an introduction, I asked how the company positions itself in the competition, what are the qualities that it tries to achieve to gain the trust of consumers. I was pleased that a significant number of respondents indicated quality as a competitive advantage, followed by innovation and novelty value, then good customer service and excellent location for the consumer. However, it can be seen from the diagram that environmentally friendly solutions are only found towards the end of the order of importance, only 46 of the 401 respondents marked this option.

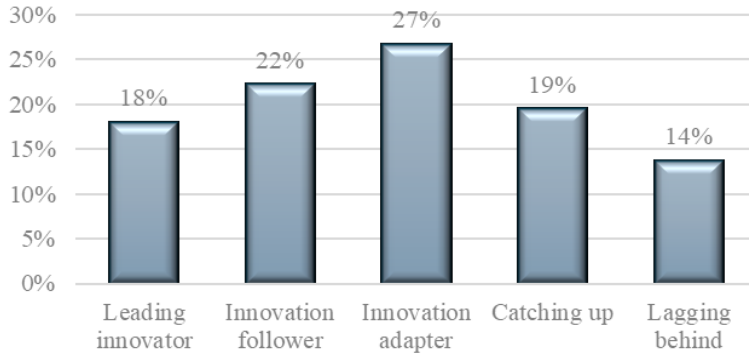


Graph 4. Advantages in the competition

Source: self-edited graph based on primary data.

The responding companies continue their innovation activities at different levels.[2] The following graph summarizes the elements of the sample in five categories, depending on how intensively innovative the given company is. In the case of this question, the answers show a roughly normal distribution, the minimal imbalance covers an innovation activity higher than average.

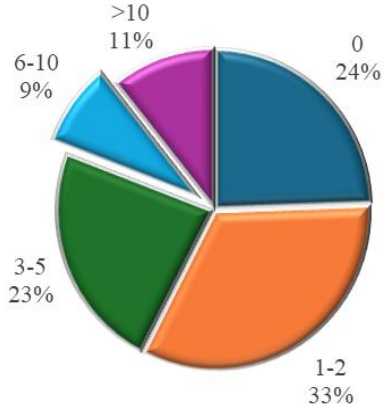
[2] Leader innovator: We are at the forefront of this, we try to be ahead of our competitors in all developments. Innovation follower: We follow new trends, we quickly introduce new developments, but we rarely carry out our own innovation. Innovation adapter: We monitor the market, we try to introduce new developments as soon as possible, but we do not innovate. Catching up: Market innovations are only introduced when they are sufficiently widespread and we can be sure that they will not cause a financial disadvantage. Lagging behind: We don't really deal with market innovations, our product/service is good as it is.



Graph 5. Self-placement on the innovativeness scale

Source: self-edited graph based on primary data.

One transparent indicator of innovation activity is the frequency with which a company introduces new products or services. The following graph shows the number of new products and services introduced in the last three years. It can be seen that at least one new product appeared in the product range of 76% of the respondents in the last three years.



Graph 6. Number of new products or services introduced in the last three years

Source: self-edited graph based on primary data.

However, it is more interesting to look at the correlation between innovation activity and company size. The following cross-tab analysis reveals that among the respondents there is no large size enterprise that has not intro-

duced innovation in the last three years. More than half of the large-sized companies introduced at least 3 or more new products or services. 52 percent, which is twice as much as in the case of micro-enterprises (25%). The correlation is therefore significant, the result of the Pearson Chi-Square test: 83.426. It is also worth noting that the stereotypic view of SMEs as a major driving force behind innovation (Varga, 2023b) is also maintained; their innovative activity seems to be substantial too (careful further analyses would also take into account how the overall number of products and services distort the statistics in favor of larger enterprises).

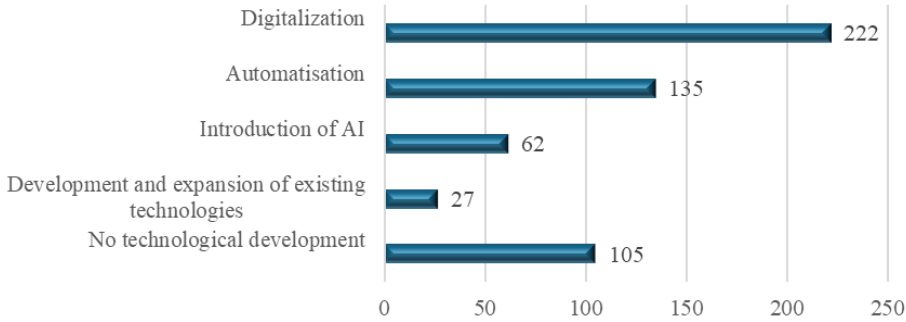
Table 1. Cross-tab analysis: company size and number of innovations introduced

			Size of the enterprise				Total
			Micro	Small	Medium	Large	
Number of new products or services introduced in the last three years	0	Count	81	14	3	0	98
		% within size	31.4%	14.6%	13.6%	0.0%	24.4%
	1–2	Count	99	27	5	2	133
		% within size	38.4%	28.1%	22.7%	8.0%	33.2%
	10+	Count	13	12	8	10	43
		% within size	5.0%	12.5%	36.4%	40.0%	10.7%
	3–5	Count	47	34	5	7	93
		% within size	18.2%	35.4%	22.7%	28.0%	23.2%
	6–10	Count	18	9	1	6	34
		% within size	7.0%	9.4%	4.5%	24.0%	8.5%
Total		Count	258	96	22	25	401
		% within size	100.0%	100.0%	100.0%	100.0%	100.0%

Source: SPSS-edited graph based on primary data.

In terms of developments, the majority of companies chose and applied digitization, closely followed by automation; which is nowadays rather a must-have prerequirement of competitiveness, not an innovation, even in the public sphere, (Bilan, Mishchuk, Samoljuk, 2023) and generally in every corner of a well-functioning modern economy (Horváth, 2023; Szalmáné, 2024). Only a quarter of the companies indi-

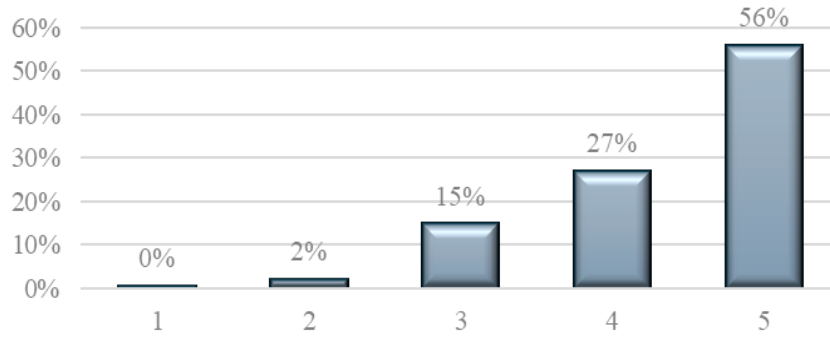
cated that they did not carry out technological development, which is roughly the same as the group of respondents who did not introduce a new product during the last three years. 62 respondents indicated the introduction of AI, but with the latter, reservations arose, as we will see later.



Graph 7. Recent technological developments (number of answers)

Source: self-edited graph based on primary data.

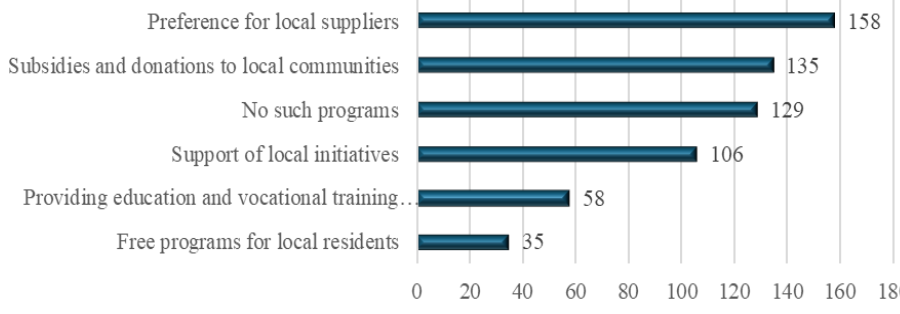
The next couple of questions focused on human resources, since innovation results and competitiveness, or a mere resilience (Bencsik, 2022) cannot be imagined without well-educated, well-managed and experienced employees (for a reverse example on the "curse" of relying on exploiting natural resources alone without investigating into human capital, see (Rácz, 2023) and many references therein). The responding companies employ graduate workers in different proportions, depending on their field of activity and size. Almost a quarter of them do not employ graduates at all, while another quarter employ 75–100% highly qualified employees. 35% of companies regularly provide training opportunities for employees, while another 39% rarely provide them. However, what is extremely thought-provoking, and most of the respondents fully agree with it, is that companies in Hungary face serious difficulties when they are looking for well-trained and reliable workers. 83% of the respondents agree that it is difficult or very difficult to find an employee of suitable quality. In the following graph, 1 represents "very easy," 5 represents "very difficult."



Graph 8. Difficulty of finding qualified and reliable employees

Source: self-edited graph based on primary data.

An important indicator of long-term competitiveness is the level of social responsibility of the examined company. To what extent does it strive to support the local community, how open is it to accepting disadvantaged workers, what programs does it operate in order to maintain workplace diversity. As can be seen from the following graph, most of the respondents prefer local suppliers, which has both a strengthening effect on the local economy and on the environment. In addition, several companies support local communities or local initiatives.



Graph 9. Supporting local communities

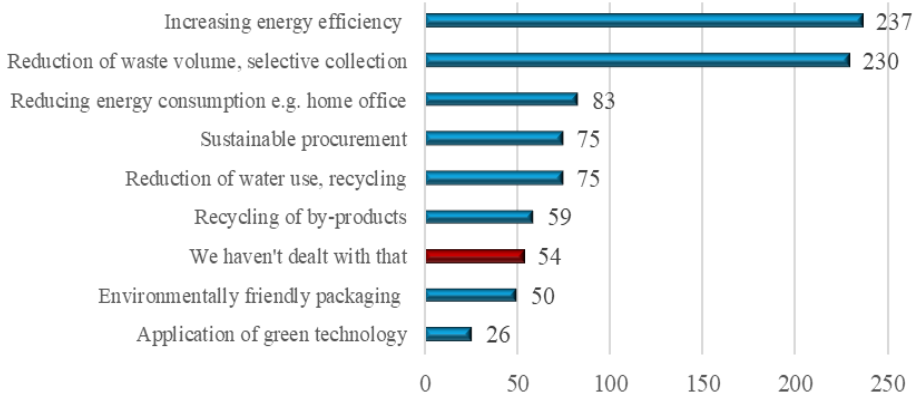
Source: self-edited graph based on primary data.

Profit has increased in the last three years for 46% of responding companies, while costs have increased for 95% of them. A decrease in profit oc-

curred only in the case of 18% of the companies. The dependence of enterprises on external sources of financing is relatively low, only 9% of the respondents stated that the company is moderately or strongly dependent on external sources.

Environmental aspects

In the following, we will focus on environmental aspects and the relationship between environmental protection and competitiveness. Unfortunately, only one-fifth of the companies participating in the survey have an official environmental protection strategy, and another 16% have the strategy under development. In the frame of sustainability measures, most companies aimed to increase energy efficiency and improve waste management, which both included the reduction of waste volume and separate collection. In addition, the organization of sustainable delivery, and home office has appeared in a significant proportion, which contributes to sustainability by reducing energy consumption and reducing the carbon footprint of transport.



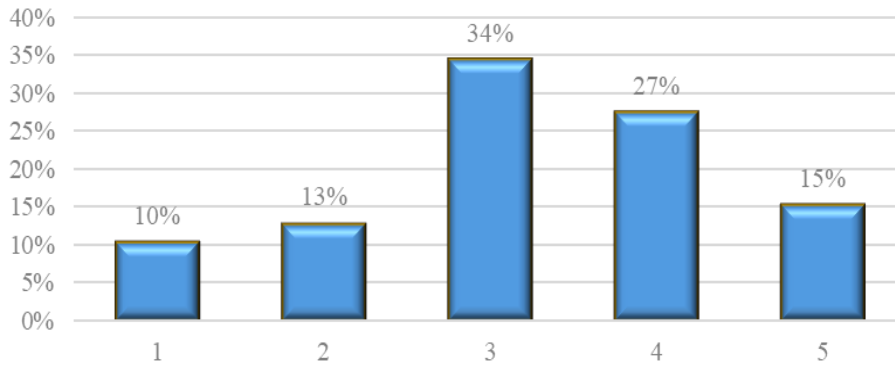
Graph 10. Sustainability measures implemented in the last five years

Source: self-edited graph based on primary data.

Business leaders are mostly aware of the environmental protection measures of their competitors, only 33% of them answered that they are

not aware of the others' steps towards sustainability. However, it is interesting that only two percent of them admitted that the environmental protection activities of their competitors are better than theirs, 56% of them said that they are the same, and 9% of them said that their competitors could show a weaker performance.

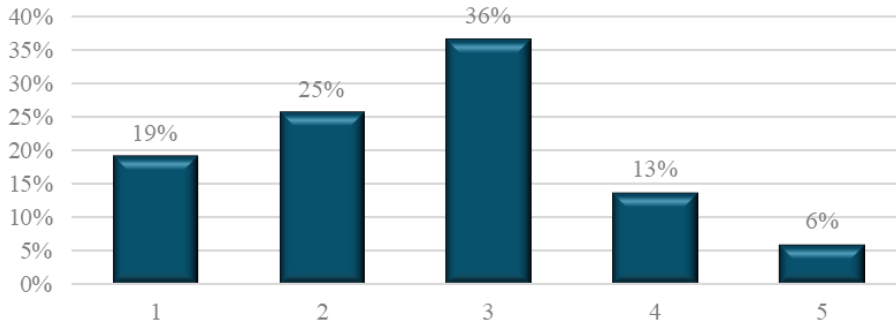
Respondents consider sustainability more important to the company's success than not. But this resolution is not perfectly clear. The following graph shows that only 42% of the respondents think that sustainability is important or very important for the success of companies. 34% of them chose the neutral answer option 3, and according to 26% of them, sustainability aspects do not affect the company's competitiveness.



Graph 11. How important is sustainability to the company's success

Source: self-edited graph based on primary data.

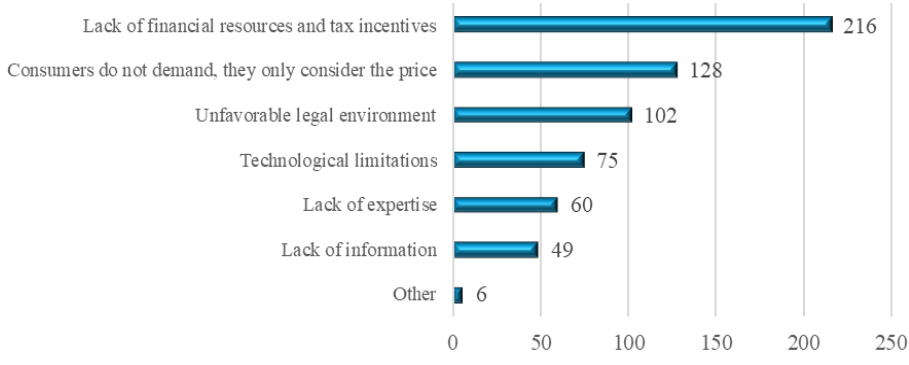
It is interesting to compare this result with another question that explores the perspective of consumers. The following graph gives an answer to how important the presence of sustainability aspects in production and trade are to consumers, according to the respondents. This is important because successful companies shall shape their actions according to the ever changing consumer needs (Garai, Popovics, 2023). If we take a look at the following graph, it seems that sustainability aspects in production are less important to consumers than to the companies themselves.



Graph 12. How important is sustainability for the consumer (as perceived by companies)

Source: self-edited graph based on primary data.

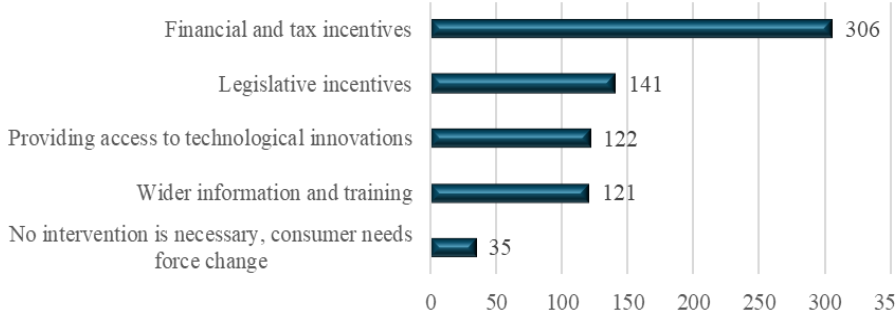
Although the introduction of sustainable operations is hindered by many obstacles. A significant number of those interviewed mentioned the lack of financial resources, but the unfavorable legal environment and technological limitations are also among the arguments. Not a very high number of respondents, but the some of them mentioned the lack of expertise and lack of information as well. But what is particularly interesting and requires further investigation is that, according to 128 out of 401 respondents, consumers are not interested in whether the company producing the product meets sustainability requirements, the price is the only basis on which they make a decision.



Graph 13. Obstructing factors of sustainable activity

Source: self-edited graph based on primary data.

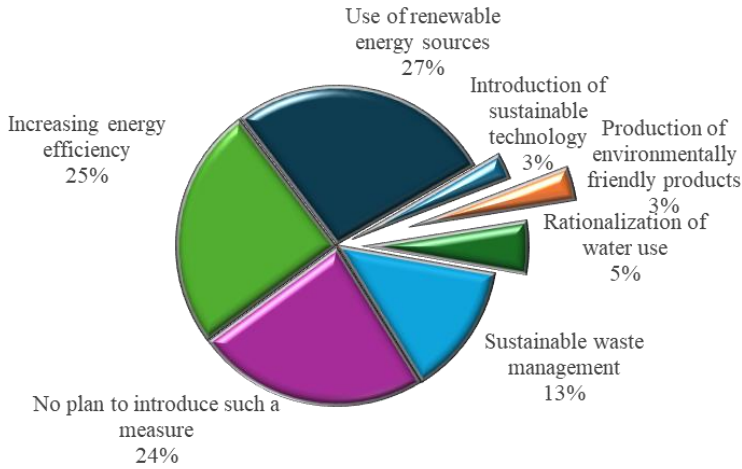
According to the companies, in order to deal with the problems and remove the obstacles, financial incentives and tax incentives would be needed, but possible solutions also include a more favorable legal environment, the easier access to technological innovations, wider information available and training opportunities. According to 35 respondents, consumer demands will force a shift in the direction of more sustainable operation without any other external incentives.



Graph 14. Opportunities to promote sustainable solutions

Source: self-edited graph based on primary data.

36% of the surveyed companies plan to introduce new environmental protection measures in the next five years, in the case of another 43% it is possible that new measures will be introduced, but it is not certain, and only 21% of the respondents said that new measures will definitely not be introduced at their company. The implementation form of these steps towards sustainability largely includes sustainable energy management, such as use of renewable energy sources (27%) and increasing energy efficiency (25%). 13% of the companies plan to make their waste management sustainable, and a smaller proportion of responses include plans related to the rationalization of water use, the production of environmentally friendly products and the introduction of sustainable technology.



Graph 15. Planned sustainability measures for the next five years

Source: self-edited graph based on primary data.

If we compare Graph 8 and Graph 13, we can see that the developments of the past five years and the planned developments of the next five years are primarily focused on energy efficiency.

Legal environment and corruption

To increase competitiveness, in addition to the factors discussed above, a well-regulated legal framework and a clean, transparent, corruption-free environment are essential. IMD's annual survey regularly asks about these topics, so I considered it important to compare my results with the national average. Table 2 was prepared based on a 10-point Likert scale, where the question was: "In your opinion, how does corruption reduce the competitiveness of companies in Hungary?," where 1 was equal to "does not reduce it at all," 10 reported: "very serious problem." Taking a look at the chart, only 27.9% of the respondents think that corruption is not a serious problem in Hungary (cumulative percentage up to option 5), while 72.1% think that corruption is a significant problem (cumulative percentage from option 6 to option 10). It is sad and worrying that 54.4% of the responding companies selected option 8, 9 or 10, which further indicates the serious level of corruption in Hungary.

Table 2. The impact of corruption on competitiveness

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	21	5.2	5.2	5.2
	2	11	2.7	2.7	8.0
	3	17	4.2	4.2	12.2
	4	12	3.0	3.0	15.2
	5	51	12.7	12.7	27.9
	6	26	6.5	6.5	34.4
	7	45	11.2	11.2	45.6
	8	75	18.7	18.7	64.3
	9	38	9.5	9.5	73.8
	10	105	26.2	26.2	100.0
	Total	401	100.0	100.0	

Source: SPSS-edited chart based on primary data.

In addition to the above, the respondents are not satisfied with the legal environment in Hungary either. According to most of them, the Hungarian legal system is difficult and does not adequately support the competitiveness of companies.

Table 3. How much does legal environment support competitiveness?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid,8	1	70	17.5	17.5	17.5
	2	58	14.5	14.5	31.9
	3	69	17.2	17.2	49.1
	4	28	7.0	7.0	56.1
	5	87	21.7	21.7	77.8
	6	37	9.2	9.2	87.0
	7	24	6.0	6.0	93.0
	8	15	3.7	3.7	96.8
	9	5	1.2	1.2	98.0
	10	8	2.0	2.0	100.0
	Total	401	100.0	100.0	

Source: SPSS-edited chart based on primary data.

The third table was also prepared using a 10-point Likert scale, where the question was: "In your opinion, how much does the legal environment support the competitiveness of Hungarian companies?," the meaning of 1: "it does not support it at all," meaning 10: "it fully supports." Almost half of the responding companies (49.1%) chose the first three options, 77.8% chose the first five, which means that only 22.2% of the companies think that the Hungarian legislative environment is more supportive than not. Few companies (2%) fully agreed with the latter statement.

Conclusion

As a result of my research, I make the following findings: Hungarian companies really believe that the lack of financial resources and tax incentives are the biggest obstacle to moving in the direction of sustainable practices. Respondents selected this option in the largest proportion to the question of what most hinders the development of sustainable corporate practices. The indifferent behavior of consumers and the lack of an environmentally sensitive way of thinking contribute to all of this, which also answers my second assumption, that according to respondents, there is no organic connection between competitiveness and sustainability. The research confirmed my assumption that the corruption present in the domestic competitive environment and the unfavorable legislative environment significantly reduce competitiveness, mainly due to the lack of opportunities and the handicap situation the companies have to operate in.

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An Overview of Information Security Challenges in Central and Eastern Europe in the 21st Century

Abstract

This article provides a comprehensive overview of information security challenges in the countries of the Central and Eastern Europe (CEE) region in the 21st century. The paper highlights the growing importance of this issue. Furthermore, it presents the existing infrastructure and regulations related to cybersecurity, assessing their significance and effectiveness while identifying areas that require improvement. The study also examines numerous case studies of cyber incidents in CEE, emphasizing the lessons learned from these events. The article underscores the impact of geopolitical tensions, conflicts, and political instability on information security in the region, providing, as an example, Russia's war with Ukraine. Additionally, it emphasizes the critical role of international cooperation in building effective defense mechanisms against dynamically evolving cyber threats. The article points out the necessity of continuously developing regulations and increasing investments in cybersecurity infrastructure. As research shows countries in CEE can enhance their information protection capabilities by promoting collaboration between the public and private sectors, as well as by continuously educating societies to raise overall awareness of information security. This study focuses extensively on Poland, as it is one of the most frequently cyberattacked countries in the world. Therefore, it serves not only as a key representative of the strategically positioned CEE region, but also as one of the most compelling examples for research.

Keywords: CEE, CEEC, information threats, cybersecurity threats, information society, information revolution, cybersecurity

Przegląd wyzwań związanych z bezpieczeństwem informacji w Europie Środkowo-Wschodniej w XXI wieku

Abstrakt

Artykuł stanowi kompleksowy przegląd wyzwań związanych z bezpieczeństwem informacji w krajach Europy Środkowo-Wschodniej (EŚW) w XXI wieku. Zwrócono

w nim uwagę na rosnące znaczenie tej problematyki. Przedstawiono istniejącą infrastrukturę oraz regulacje prawne dotyczące cyberbezpieczeństwa, oceniając ich znaczenie, skuteczność oraz wskazując obszary wymagające usprawnienia. W artykule omówiono również liczne studia przypadków incydentów cybernetycznych w regionie EŚW, podkreślając wnioski wyciągnięte z tych doświadczeń. Zaprezentowano wpływ napięć geopolitycznych, konfliktów i niestabilności politycznej na poziom bezpieczeństwa informacyjnego w regionie, przywołując jako przykład wojnę Rosji z Ukrainą. Wskazano też na kluczową rolę współpracy międzynarodowej w budowaniu skutecznych mechanizmów obrony przed dynamicznie rozwijającymi się zagrożeniami cybernetycznymi. Artykuł akcentuje konieczność nieustannego rozwoju przepisów prawnych oraz zwiększania nakładów inwestycyjnych na infrastrukturę cyberbezpieczeństwa. Z badań wynika, że państwa EŚW mogą zwiększyć swoje możliwości w zakresie ochrony informacji poprzez promowanie współpracy między sektorem publicznym a prywatnym, a także poprzez ciągłe kształcenie społeczeństw w celu zwiększenia ogólnej świadomości w zakresie bezpieczeństwa informacyjnego. Szczególną uwagę poświęcono Polsce – jednemu z najczęściej atakowanych cybernetycznie krajów na świecie. Polska jest zatem nie tylko ważnym reprezentantem strategicznie położonego regionu EŚW, lecz także jednym z najbardziej przekonujących przykładów do badań.

Słowa kluczowe: Europa Środkowo-Wschodnia, kraje Europy Środkowo-Wschodniej, zagrożenia informacyjne, zagrożenia cyberbezpieczeństwa, społeczeństwo informacyjne, rewolucja informacyjna, cyberbezpieczeństwo

Introduction

One of the most notable aspects of the development of contemporary civilization is the constant growth of the role of information. It is the result of the information revolution caused by rapid technological progress and widespread digitalization which has brought the world into the era of the information society, where information and knowledge become the strategic assets, as they have a meaningful impact on all areas of life. A significant consequence of this is the systematic elevation of the importance of information security, which has grown substantially, especially in the 21st century, when technological advancements accelerated (Kubiak, 2016, p. 25).

The Central and Eastern European (CEE) region, with its complex historical legacy and diverse political landscape, stands at a unique intersection of

that technological development, as well as political, economic, and social transformations. After the fall of communism, it moved closer to European Union (EU) standards, as many CEE countries joined the EU in 2004 by integrating them into European markets and governance structures. This period has also introduced an increased digital adoption and development of critical infrastructure. However, these gains were coupled with persistent security challenges, such as security of information. The CEE region, often serving as a gateway between East and West, has become a critical hotspot, where geopolitical tensions and a fast-evolving threat landscape intensify the urgency of understanding and addressing information security challenges (Cabada, 2020, pp. 428–429). A prime example can be the recent events, such as the war in Ukraine, also called a hybrid war due to its nature combining, among others, dissemination of false information aimed at destabilizing a target state (Krawczyk *et al.*, 2024, pp. 235–236). There are numerous well-documented cyber incidents in CEE countries neighboring Ukraine associated with this conflict.

The subject of this study was chosen due to the growing relevance of cybersecurity in the CEE region over time. The article aims to specifically analyze the information security challenges and their nature that the region must confront in this century, focusing on both the threats and the measures taken in response, along with their evaluation. To achieve this, a comparative analysis of the challenges and corresponding responses was conducted, based on case studies of significant cybersecurity incidents in the CEE region.

The following section includes a comprehensive review of the literature, providing an analysis of relevant concepts and works related to this study. The next section details the research methodology, outlining the sources for cyber incident statistics in CEE countries and the criteria applied for selecting case studies. Further, the results of the analysis are presented, focusing on the relevant information security challenges identified in the CEE region. In the discussion part, the implications of these results are explored. Finally, the article concludes with a summary of the key points discussed throughout the whole study, offering recommendations for future information security development within the CEE region, potential future research directions and by highlighting study's limitations.

Literature overview

Analyzing works related to the subject of this study, it is important to begin by explaining fundamental concepts such as information, security, cyberspace, cyber incident and information security itself. It is very hard to present one commonly agreed definition of information. Kwiećka (2001, p. 90) states that "information is a portion of the energy accumulated in the material projection." This definition was further developed by Świątkowska (2017, p. 31) who noticed that information has at least two functions: it can be described as any transmission that has the potential to modify behavior in individuals and social groups, while on another level, it functions as a directive mechanism for controlling machines and infrastructures.

According to Brooks, it is also hard to provide one definition of security. It can be defined as "a stable, relatively predictable environment in which an individual or group may pursue its ends without disruption or harm and without fear of such disturbance or injury" (Fischer, Green, 2004, p. 32). In the context of this study, security definition can extend to encompass national security and the defense of a country, whether through military action or the use of force to control a state's population (Brooks, 2010, p. 226). Moreover, according to Oleński, the responsibility of ensuring security is a fundamental and an inalienable task of the state, which is maintained by society. This encompasses security in all areas of social and economic life. Oleński (2015, p. 21) categorized it into the following areas: external (e.g. military forces), internal (e.g. justice system), social (e.g. healthcare), economic (e.g. legal organization of economic entities), environmental (e.g. agencies monitoring and responding to environmental threats), and informational (e.g. education systems, public information services, and the mass media), which is the subject of this study.

Cyberspace was defined by Sienkiewicz as the domain of information creation and exchange, formed by telecommunication and information systems, along with the connections between them and their interactions with users (Sienkiewicz, 2017, p. 254). This definition stresses the key aspect that information systems operation and development are dependent on humans (Kubiak, 2016, p. 107). A cyber incident can be defined as "any occurrence that has impact on any of the components of the cyber space or on the func-

tioning of the cyber space, independent if it's natural or human made; malicious or non-malicious intent; deliberate, accidental or due to incompetence; due to development or due to operational interactions" (ENISA, 2017, p. 6). As proposed by Kubiak (2016, p. 30) "information security is a state and process in which, throughout the entire information lifecycle (creation, transmission, processing, copying, use, storage, collection, and destruction), the achievement and maintenance of its fundamental properties – such as availability, usability, integrity, and confidentiality – are ensured at the desired level by the entity, in accordance with applicable security standards." The provided definition underlines a key aspect – that information security is about ensuring the protection of data at every stage of its lifecycle, without exceptions.

Conflicts within the information sphere are emerging as a fundamentally new arena of competition between states, in the CEE region, especially, between Ukraine and Russia in the context of a hybrid war (Krawczyk *et al.*, 2024, p. 236). Although the conflict between these countries began in 2014, the issue of information security in Russia and CEE countries existed long before that. In their article, Kuczyńska-Zonik and Tatarenko demonstrate the specifics of Russian propaganda in the CEE, which has posed a clear security threat to these nations since the beginning of 21st century. According to them, it can even be argued that the information warfare in the CEE is not solely aimed at weakening the countries in the region, but rather at undermining the Western world, particularly the EU, which has been Russia's primary target, especially since the outbreak of the crisis in Ukraine, as well as NATO since the early 21st century. This is carried out through various means, such as social media, which make it easier to create and share unverified information. However, the nature of pro-Russian disinformation varies from country to country, as do the tools and channels used for spreading it (Kuczyńska-Zonik, Tatarenko, 2019, pp. 144–153).

Manipulation of information in social media and mass communication channels is not the only threat to information security in the CEE countries. A primary concern are direct attacks on IT systems targeting financial institutions, government, military, diplomatic agencies, telecom and power supply companies, politicians and activists, as well as private enterprises. These attacks are often highly complex and involve a long-term series of actions. Typ-

ically, they are carried out by attackers who spend months studying their target. Such attacks are usually executed by APT (Advanced Persistent Threat) groups. During Infosecurity Europe 2011 conference, APTs were recognized as one of the biggest cyber threats in the modern world. These threats are considered advanced primarily because of the complex nature of the danger they pose. The hackers behind APTs are not only highly skilled and well educated but also have access to the resources and funding, often from the government they represent (Rot, Olszewski, 2017, pp. 113–114). Their activity is also evident in the CEE region, with specific examples of their operations discussed later in this work.

Internal actors pose a threat to information security alongside external ones. As Cieślarczyk notes, modern humans often struggle to keep up with the rapid development of new technologies and the changing security environments, particularly the informational-technological one. Although younger generations are more adept with information technology than adults, it is difficult to claim that their level of information culture and security awareness is similarly advanced. This situation brings with it various challenges and risks, raising questions about the general awareness of CEE societies concerning cyber threats (Cieślarczyk, 2015, p. 16).

Nemeslaki and Sasvari measured Information Security Awareness (ISA), defined as an employee's general knowledge about information security and their understanding of their organization's information security policy, among several hundred Hungarian public servants. They found that while ISA in public institutions, state-owned organizations, non-profit public organizations, medium-sized enterprises, local governments, and for-profit local government organizations was at a satisfactory or adequate level, it was poor in microenterprises, small-sized enterprises, and non-profit local government organizations. The authors observed that employees were partially aware of the risks and, in most cases, know that certain security principles should be followed. However, they required further education on the subject as some of them were completely unaware of the dangers, safety principles, or even the security regulations in their workplace (Nemeslaki, Sasvari, 2015, pp. 406–416). Such employees can become potential targets during cyberattacks. Internal conflicts within a country also pose challenges to information security (Saideman, Zahar, 2008, pp. 4–5), which can also be threatened by local hackers targeting national institutions or companies.

It is worth emphasizing here that the threats posed by APT activities, often due to low ISA and internal conflicts, although presented in the context of the CEE region, also concern other countries worldwide. The same applies to threats related to the development of artificial intelligence (AI). In an article dedicated to small and medium enterprises from the CEE region on the challenges of AI adoption, the authors note both, enthusiasm and concerns about the potential of AI for improving cybersecurity (Vidu, Pinzaru, Mitan, 2022, p. 64). AI can be used not only to enhance cybersecurity but also to conduct more effective social engineering campaigns. A notable example is deepfake technology that allows the creation of realistic and difficult to detect fake materials. There are many concerns about their unethical use, such as creating false information, fraud, or political manipulation (Kozminski University, 2023).

On the other hand, aside from the challenges associated with information protection, literature also highlights how countries in the CEE region are responding to these issues. As Marton Domokos, Senior Counsel at CMS Hungary and Head of CEE Data Protection, admitted, CEE countries, like many others globally, have introduced or updated cybersecurity regulations to address the growing threat landscape. The EU's General Data Protection Regulation (GDPR), which has had a significant impact on data protection and cybersecurity practices across the EU, also plays a crucial role for CEE countries (Grzegorczyk, 2023). Additionally, many countries are implementing their own regulations aimed at protecting information. An example is the Polish Act of August 5, 2010, on the Protection of Classified Information, and the Act of July 5, 2018, on the National Cybersecurity System, which implements the European Parliament and Council Directive on measures for a high common level of security of network and information systems within the EU, known as the NIS Directive (Ministry of Digital Affairs, 2018).

It is also worth noting the numerous government programs being developed in CEE countries. Once again, Poland serves as an example with its robust "cyber.mil.pl" program, which covers four strategic areas. The first is the consolidation and construction of cybersecurity structures; the second – education, training, and exercises; the third – cooperation and building a strong international position; and the fourth one – enhancing the security of ministry and military networks and systems (Ministry of Defense). Addi-

tionally, the Republic of Poland's service provides materials for all primary and secondary school grades, developed by experts, which teachers can use to introduce cybersecurity education in their classes. In Poland, numerous institutions, such as the National Research Institute (NASK), the Cybersecurity Institute Foundation, or the Kosciuszko Institute are working intensively to spread cybersecurity knowledge. Many internet creators are also contributing to cybersecurity education in all CEE countries. Raising awareness about information threats and educating the societies can reduce the effectiveness of various attacks and, as result, strengthen and positively impact information security across the CEE region.

This work devotes considerable attention to Poland since in February 2024, during the CPX Cybersecurity Summit and Expo conference in Vienna, analysts from Check Point Research revealed that Poland is the most cyber-attacked country in the world, with over one thousand cyber attacks on organizations occurring each week. It is not only one of the key representatives of the CEE region but also one of the most interesting examples for research (International Trade Administration, 2024).

Research methodology

A combination of case study methodology and desk research techniques was applied in this work. Numerous studies and articles on information security and related challenges in the CEE region were considered, along with case studies of well-known attacks threatening information security in various Central and Eastern European Countries (CEEC) since the beginning of the 21st century. These case studies helped illustrate the evolving landscape of threats and challenges, as well as examined how the affected entities have responded to them over the years, focusing particularly on the most recent incidents. This approach enabled the identification of the key information security challenges currently faced by the region, offering also the best recommendations for addressing these challenges.

However, it is important to note that the use of case studies, which have indisputable educational value, and desk research techniques may have certain limitations, such as potential biases in the available data and limited access to internal or confidential reports related to the analyzed problem.

Analysis results

A case study worth starting with is the example of Estonia. After facing a wave of significant cyber attacks in 2007, this country became one of the world's pioneers in developing a national cybersecurity strategy. The cyberattacks, which took place following the relocation of the Bronze Soldier of Tallinn (a Soviet-era monument), are often referred to as the first instance of cyberwarfare, targeting various elements of Estonia's digital infrastructure, including government websites, banks, and media outlets. These attacks were believed to have been orchestrated by groups sympathetic to Russia, although direct attribution to the Russian government remained unproven. The Estonian government responded swiftly by fortifying its digital resilience, with the Ministry of Defence drafting a comprehensive national cybersecurity strategy. Estonia also gained NATO's attention, leading to the establishment of NATO's Cooperative Cyber Defence Centre of Excellence (CCDCOE) in Tallinn, in 2008. Within the years, Estonia continued to build on its cybersecurity capabilities, launching the Digital Agenda 2020, aimed at fostering Information and Communications Technology (ICT) use and smart solution development across the country (Tumkevic, 2017, p. 77). In August 2022, Estonia faced another large-scale cyber attacks on its state institutions. However, Estonian Information System Authority (RIA) was highlighting that data confidentiality was not at risk, as attackers were not able to access or change the data due to adequate counter measures being deployed. This reflects a valuable lesson Estonia has learned from the previous experiences (Digital Watch, 2022).

Although many nations and companies have suffered from cyberattacks, Czech websites remained largely unaffected until March 2013, when a wave of cyberattacks disrupted several services. In early March, major Czech news sites, the leading search engine, the Prague Stock Exchange, and key financial institutions, including the National Bank, faced sustained Denial-of-Service (DoS) attacks. The government acknowledged that while the Czech Republic was technologically advanced, its cybersecurity defenses were insufficient, making it an attractive target for hackers. Although the country had introduced its Cyber Security Strategy for 2011–2015, which aimed to establish a national defense framework, implementation was delayed due to legislative

challenges and bureaucratic inertia. Experts have observed that large-scale attacks like DoS are often orchestrated by more substantial actors due to the high costs and infrastructure demands involved. Consequently, smaller nations should collaborate to strengthen their cybersecurity, ideally forming alliances with each other and larger countries to present a united front against state-sponsored or individual cyber threats (Kostyuk, 2014, pp. 68–72, 82). In 2024, the Czech Ministry of Foreign Affairs confirmed that an APT group had conducted prolonged cyber espionage attacks, including exploiting a newly discovered vulnerability in Microsoft Outlook in 2023. The attack was linked to APT28, a group associated with Russian military intelligence. The ministry offered technical guidance and support to the affected organizations, recognizing that such attacks on political entities, state institutions, and critical infrastructure pose significant national security risks and threaten democratic processes. The ministry emphasized its commitment to bolstering the resilience of both public and private sectors and highlighted the importance of international cooperation, particularly among CEE countries (Ministry of Foreign Affairs of the Czech Republic, 2024; Ribeiro, 2024).

Another interesting case study is Poland that has enacted a series of extensive changes to its cybersecurity defense system over the years, leading to the development and implementation of a national cybersecurity strategy. Cybersecurity has also become a key element of Poland's broader national security framework and is consistently referenced in other strategic state documents. The country first addressed cybersecurity in its 2007 National Security Strategy, acknowledging its critical role in maintaining national stability. This was further expanded in the Strategy for the Development of Poland's National Security System for 2011–2022, which outlined more specific actions for protecting cyberspace. In 2013, Poland introduced its first cybersecurity document, the Cyberspace Protection Policy. Two years later, the National Security Bureau (BBN) published a cybersecurity doctrine, assigning responsibilities to state institutions, security agencies, the armed forces, private companies, and NGOs. Key organizations such as the BBN, Ministry of Administration and Digitization, Internal Security Agency, and CERT were tasked with implementing these cybersecurity objectives (Tumkevic, 2017, p. 73). A recent relevant information security incident happened on May 21, 2024, when visitors to the Polish Press Agency (PAP) website were met with

an unusual message. Instead of the typical daily news, the newspaper had supposedly published a story announcing that a partial mobilization was ordered by Polish Prime Minister. The goal of the attack was to spread disinformation and influence the elections. Moreover, the false information was delivered through malware and was also spotted within two minutes. After this incident, Poland announced that it was increasing its cybersecurity spending to almost $760 million to improve digital security and prepare better for future attacks (Gregory, 2024).

In 2017 Niedermeier compared and assessed national cyber defense strategies in the CEE region, based on analysis of National Cyber Security Strategies (NCSS). He analyzed ten countries, including Estonia, Czech Republic, Poland, Bulgaria, Hungary, Lithuania, Slovakia, Croatia, Slovenia and Latvia. According to his findings, there was a diverse approach to cybersecurity strategy among the region. Most of the analyzed countries had distinct NCSS, which means that these countries have created special documents dedicated exclusively to cybersecurity strategies. The exceptions were Bulgaria and Hungary, where cybersecurity was integrated into the broader national security and military strategies, rather than a separate document. The author also noticed that all countries strongly emphasized the need to strengthen government coordination, increase public awareness and develop international cooperation to effectively counter cyber threats. Additionally, all countries recognized the cyber threat in both military and non-military contexts (Niedermeier, 2017, pp. 53–58).

In terms of information security, especially relevant are data breaches. In his article, Kyle distinguished the top twenty biggest case studies of data breaches in Europe over the past few years which included Ukraine, Poland, Latvia and Bulgaria. In 2010, a hacker leaked 7.5 million Latvian tax records, financial details, and salaries of public sector employees. In 2014, Ukraine's PrivatBank lost 40 million customer records, such as passports and personal details, stolen and published by a pro-Russian group, CyberBerkut. That same year, suspected ISIS-affiliated hackers targeted the Warsaw Stock Exchange, exposing 30,000 investor login credentials. In 2019, Bulgaria's National Revenue Agency (NRA) suffered a breach affecting 5 million citizens, with sensitive data leaked online on various Bulgarian media platforms, compromising salary details, tax payments, social security numbers, etc., marking Bulgaria's largest data breach (Kyle, 2024).

The cyber threat landscape in Europe continues to evolve, with cyber attacks targeting multiple institutions across the CEE. Share of cyber attacks in CEE in 2021, by category shown that Belarus recorded the highest percentage of banking malware and crypto miner attacks among CEE countries. Conversely, Russia had the largest proportion of telnet attacks, exceeding 3.8% (Sas, 2022). By 2023, Belarus again topped the list for the highest rate of malware infections, with over 28.2% of computers affected. Meanwhile, Romania had the highest incidence of malware on mobile devices, with 5% of devices reported as infected (Statista Research Department, 2024).

Considering the presented literature overview, described case studies of selected countries and statistics, it is possible to identify contemporary challenges of information security in the CEE region. These challenges primarily consist of specific threats related to data, their sources, and causes. The greatest threat is unauthorized access to information, followed by its disclosure, modification, or destruction. Disclosure affects data confidentiality, modification impacts integrity, and destruction compromises availability. Meanwhile, unauthorized access affects all three attributes from CIA (Availability, Integrity, Confidentiality) Triad, which describe a model designed to guide information security policies within an organization (Hashemi-Pour, 2023). There is no doubt that the main sources of these information security threats are external actors, such as APTs and other organizations aiming to compromise data security in CEE countries. Indeed, the geopolitical location of the CEE region, serving as a bridge between East and West where interests collide, plays a significant role. Threats may also arise from within the CEE region, as demonstrated by the activities of APT28. Furthermore, information security at the national level can be affected by internal conflicts, local cybercriminals, low ISA, and, at the organizational level, by former or current employees, or competitors (PwC, 2023).

It is an optimistic signal that countries learn from mistakes and try to respond to emerging threats to information security, thanks to which cybersecurity becomes an indispensable element of ensuring state security. However, despite the implemented regulations and programs, there is still a strong need for increased cooperation between CEE countries, as well as its international partners. As mentioned, the cyber threat landscape of the CEE region

continues to evolve and one of the main reasons shaping the picture of these threats in the 21st century may be the conflict between Ukraine and Russia. The presented analysis proves that a large part of cyber attacks on CEE countries, being a direct threat to information security, is related to this conflict. This makes it difficult to accurately predict what challenges related to information security the future will bring in the CEE region, because they are strongly conditioned by the further course of this conflict.

Discussion

Providing information security in the age of cyber and information warfare has evolved into a significant challenge (Kubiak, 2016, p. 7). As show case studies, APT groups, such as APT28, with connections to Russian intelligence, have been consistently targeting CEE countries, causing a serious threat to the security of information. That is why both the literature review and case studies underline the strong importance of cooperation among CEE countries. Particularly smaller nations should prioritize collaboration with each other to collectively defend against more substantial cyber threats. Domokos emphasized the key role of policymakers to enforce international cybersecurity standards and promote public-private and international cooperation for effective threat response (Grzegorczyk, 2023).

It is hard to generalize the result of this work stating that it shows a comprehensive landscape of information security challenges in the CEE region in the 21st century, as only selected countries were analyzed. Rather, this work should serve as a point of reference for a much broader and more complex problem, especially considering new threats related to war in Ukraine or technological development. For example, the growing use of AI, not only to strengthen cybersecurity defenses, but also complicates the landscape, enabling attacks' automation and raising new challenges such as deepfakes (Kozminski University, 2023).

It is essential that in the 21st century, the concept of security has evolved – it is now considered more broadly. What used to be understood as the absence of threats is now seen as the mitigation and facing of risks, not avoiding it (Koziara, 2015, p. 17).

Conclusion

This article offers an analysis of the current information security challenges within the CEE region. Through a literature review and a series of case studies focused on selected CEE countries it illustrates how they have been targeted by cyber attacks, with Estonia emerging as a pioneer in cybersecurity strategy after facing serious attacks in 2007. Also, Poland has made significant investments to bolster its defenses, similar to the Czech Republic after becoming a victim in cyber attacks in 2013. Furthermore, the analysis explores how geopolitical aspects exacerbate the cyber threat landscape in the region, linking many of the cyber attacks to economic, political and military motives, especially underling the meaning of the ongoing Ukraine-Russia war.

The key findings emphasize that unauthorized access to data remains the most critical threat, affecting its confidentiality, integrity, and availability. External actors, particularly APTs, are identified as the primary sources of these threats along with low ISA. Thus, the practical implications of this research include the need for improved collaboration between CEE countries and their international partners. Policymakers should also focus on enhancing regulatory frameworks, as well as promoting public and private partnerships, and information security-related education among societies. Organizations need to conduct regular risk assessments and employee training aimed at defending against external and internal information security threats.

One of the key limitations of this study is its focus on case studies from selected countries within the CEE region, which may not fully represent the cybersecurity challenges faced by other nations. Future research should also explore more the impact of AI and quantum computing, becoming key challenges to the effectiveness and relevance of existing security measures. A broader analysis encompassing more countries in CEE and, particularly, in more detail would provide a more comprehensive and more accurate perspective on the regional challenges of information security and responses.

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Russia's Influence on the Media in Kazakhstan

Abstract

The article offers an analysis of Russian influence on Kazakhstan's media policy, as well as decisions of the country's president and other Kazakh politicians regarding the media in recent years. The second part of the analysis presents the official position taken by Russia concerning the above. The article is descriptive in nature, based mainly on data from official Kazakh institutions (media market research companies, official positions of Kazakh and Russian politicians and spokespersons, street polls and surveys by research companies regarding the presence of Russian television in Kazakhstan). Russia's influence on the Kazakh media is understood by the presence of Russian mainstream media in the form of state-owned companies (including National Media Group) or private individuals, especially Russian oligarchs. The article does not include research on the substantive influence of Russian media on Kazakh society, which requires sociological surveys or other related media studies, but presents the legal aspect of the issue regarding the requirements of Kazakh law applicable to foreign media entities, freedom of speech and journalistic expression in Kazakhstan in the assessment of international organizations, as well as activities of the Kazakh Ministry of Culture and Information towards the media and journalists. The aim of the article is to identify those media that belong to Russia and act as tools of information warfare in relation to the war in Ukraine.

Keywords: Russia, Kazakhstan, media, political influence, public opinion

Wpływ Rosji na media w Kazachstanie

Abstrakt

Artykuł zawiera analizę wpływu Rosji w ostatnich latach na politykę medialną Kazachstanu, a także decyzje prezydenta tego kraju i innych kazachskich polityków dotyczące mediów. W drugiej części analizy przedstawiono oficjalne stanowisko Rosji w tej sprawie. Artykuł ma charakter opisowy i opiera się głównie na danych pochodzących

z oficjalnych instytucji kazachskich (firm zajmujących się badaniem rynku mediów, oficjalnych stanowisk kazachskich i rosyjskich polityków i rzeczników, sondaży ulicznych oraz badań firm badawczych dotyczących obecności rosyjskiej telewizji w Kazachstanie). Wpływ Rosji na kazachskie media rozumiany jest jako obecność rosyjskich mediów głównego nurtu w postaci przedsiębiorstw państwowych (w tym Narodowej Grupy Mediów) lub osób prywatnych, zwłaszcza rosyjskich oligarchów. Artykuł nie zawiera badań dotyczących merytorycznego wpływu rosyjskich mediów na społeczeństwo kazachskie, co wymagałoby badań socjologicznych lub innych powiązanych badań nad mediami, ale przedstawia aspekt prawny tej kwestii w odniesieniu do wymogów prawa kazachskiego mających zastosowanie do zagranicznych podmiotów medialnych, wolności słowa i wypowiedzi dziennikarskiej w Kazachstanie w ocenie organizacji międzynarodowych, a także działań kazachskiego Ministerstwa Kultury i Informacji wobec mediów i dziennikarzy. Celem artykułu jest identyfikacja mediów należących do Rosji i pełniących rolę narzędzi wojny informacyjnej w związku z wojną w Ukrainie.

Słowa kluczowe: Rosja, Kazachstan, media, wpływy polityczne, opinia publiczna

Introduction

At the beginning, it is worth explaining briefly the political context of Kazakhstan and its relations with Russia, which allows us to better understand the media policy pursued by Kazakhstan. Since 2002, the Republic of Kazakhstan has been part of the military-political bloc called the CSTO (Collective Security Treaty Organization), which also includes Russia, Armenia, Belarus, Kyrgyzstan and Tajikistan. Countries such as Azerbaijan, Georgia and Uzbekistan have already left this organization. In August 2024, President of Kazakhstan Kassym-Jomart Tokayev published an article in *Kazakhstanskaya Pravda* suggesting the foundation of an alternative alliance consisting only of countries of Central Asia without Russia (kazpravda.kz, 2024). Three months later, Kazakhstan also rejected the invitation to join the BRICS group (Brazil, Russia, India, China, South Africa) saying that the country gave priority to another international organization – the United Nations (moscowtimes.ru, 2024). These political signals show Kazakhstan's subtle distancing itself from Russia, an approach intensifying since the outbreak of the war in Ukraine in 2022. At the same time, Kazakhstan's economic situation (including the transit of Kazakh oil through Russian pipelines to Europe) does not allow for the country's full independence from Russia. However, in the area of Kazakhstan's recent

media policy, there have also been visible attempts to take the country away from Russian propaganda, especially Russian television.

Russian media in Kazakhstan

Similarly to foreign policy, also in the media area Russian shares are present in Kazakhstan's media system mainly in the television sector. The researcher's company AidData has prepared a report on the ownership, shares and potential influence of foreign television channels (Dumont, Solis, Zaleski, 2023).

"1 Channel Eurasia" has been broadcasting in Kazakhstan since 1997 and has an information and entertainment profile. The director of the station is the Russian Sergei Kiselev, previously a deputy of the Mäjilis of the Parliament of the Republic of Kazakhstan and a member of the Nur-Otan (party1tv.kz, 2024). The other TV Channel 31 has been broadcasting in Russian and Kazakh since 1993. The shareholders of this television outlet are the Kazakh businessman Bulat Utemuratov (80%), the Russian oligarch Ivan Tavrin (15%) and the state Bank Rossiya (5%) (31.kz, 2024).

Russian-language channels dominate over ones broadcasting in Kazakh, with some researchers even indicating that 75% of viewers are native Russians or Russian-speaking Kazakhs who prefer Russian television (thediplomat.com, 2017). Pro-Russian media are a powerful tool in spreading disinformation and propaganda among their audiences, and they undermine support for Ukraine among the section of society that distances itself from the war. The majority of participants in anti-war protests in Kazakhstan are under 40 years of age (opendemocracy.net, 2022).

The television sector was presented as the most popular audiovisual medium, with Kazakh channels – KTK and NTK (owned by Dagira Nazarbayeva, the eldest daughter of the first president of Kazakhstan, Nursultan Nazarbayev). The most recognizable Russian channel in the TV schedule is Channel 1 Eurasia. The Kazakh government has 80% of shares in this channel, but the remaining part belongs to the Russian government, VTB bank, National Media Group and Sogaz (Dumont, Solis, Zaleski, 2023, p. 5). In the viewership ratings, Channel 1 Eurasia usually takes first or second place (alternating with Qazakstan TV) among other TV outlets (tribune.kz, 2023).

Kazakh politicians discussed the possibility of blocking Russian television channels at the parliament in 2022. Muscat Tolykbay, an MP, believes that many citizens of Kazakhstan are fed up with the propaganda of pro-Kremlin channels , and Russian channels are also available in his home without his consent (https://www.youtube.com/watch?v=ZSo18l_rjlo, 2024).

A street survey conducted among Almaty residents shows that some older viewers expect Russian channels to be present because they use the Russian language on a daily basis, while the majority, however, dissociates themselves from Russian channels due to their content (one of the respondents stated that these channels were not what he watched because crime stories and war predominate there) (https://www.youtube.com/watch?v=ZSo18l_rjlo, 2024, 3:23).

In August 2023, by the decision of the Ministry of Information and Social Development of the Republic of Kazakhstan, the Russian propaganda channel Tsargrad belonging to the Russian oligarch Konstantin Malofeev was blocked for inciting hatred and propaganda\extremism. (azattyq.org, 2023).

Broadcasting since 2014, the channel, which has been has a nationalist profile and was intended to attack Ukraine and break the unity of the European Union. For violating the sanctions regime and organizing the work of pro-Kremlin media in Europe, Malofeev was sentenced by an American court to confiscation of $5.4 million (currenttime.tv, 2023). This money was transferred by the US court to Ukraine.

Kazakh operators – TVCOM and Kazakhtelekom – decided to turn off several Russian television channels. In January 2024, TVCOM excluded channels such as Rossiya 1, Rossiya 24, 1 Kanal. NTV and Russia Today. The reason given was the lack of their registered representative offices in Kazakhstan (moscowtimes.ru, 2024). This decision was made independently by the operator, because government agencies have no right to interfere in civil relations between operators and owners of TV outlets. The reason for blocking the channels was the increase in the costs of channel distribution.

New media law in Kazakhstan

In January 2024, a new media law on the rebroadcasting requirement came into force in Kazakhstan, which forces foreign channels to register as a branch or legal entity. This means that if legal requirements are met, the

channels may appear again in the cable schedule (Закон Республики Казахстан от 18 января, 2012).

The Minister of Culture and Information of Kazakhstan Aida Balaeva told journalists that Kazakhstan could not limit the broadcasting of Russian channels (.currenttime.tv, 2024).

"We cannot deprive our viewers of their rights and dictate the right to watch only our homeland production" (Aida Balaeva, Minister of Culture and Information of Kazakhstan at a meeting with journalists in Astana; .currenttime.tv, 2024).

According to the international organization Reporters Without Borders, Kazakhstan was in the 134th place in 2023, which is a low position among 180 countries. In 2024, Kazakhstan dropped to 142th place (https://rsf.org/en/country/kazakhstan). In the assessment of Freedom House, another organization examining the level of freedom of speech, Kazakhstan is described as an "unfree" state in which the mainstream media is state-owned or owned by Russian or Kazakh businessmen friendly to the government (freedomhouse.org, 2024).

The constitution prohibits censorship, but difficulties in the work of reporters are a fact and often result from ignorance of media law, while press conferences are an example of hindering the work of journalists. The Kazakh parliament has passed an amendment giving the possibility of refusing accreditation for Western media in the event of a "threat to the national security of the Republic of Kazakhstan (rus.azattyq.org, 2024).

First, accreditation was refused to journalists working for the Kazakh branch of Radio Free Europe – Radio Azattyk (rus.azattyq.org, 2024).

Moreover, in July 2021, it was revealed that the Kazakh security services could eavesdrop on journalists using the PEGASUS program, and many of their telephones were privately owned (globalvoices.org, 2021).

In June 2024, President Jomart Tokayev signed an amendment to the Media Law, which caused great concern among human rights defenders. In the opinion of international organizations, the allegations mainly concern the provisions on the working conditions of journalists, which will certainly not improve and may, on the contrary, be used to censor the media. A new legal provision has been added granting the Ministry of Information the right to monitor the mass media in terms of "harming the moral development of

society, and violating universal, national, cultural and family values". The law also includes provisions to increase the number of Kazakh radio and television programmes from 50 to 60%, which is to be a gradual measure. A similar legal provision applies to Kazakh musical works, the number of which is to increase to 55% in 2025, and from 2027 to 60% (rus.azattyq.org, 2024). At the same time, the rebroadcast of foreign television and radio programmes (including Russian) has been reduced from 20 to 10% (en.inform.kz, 2024). The provision on the possibility of refusing accreditation to journalists due to Kazakh legislation is incomprehensible and unclear. Reporters Without Borders has called on President Tokayev to abolish the act and warned against using this legal act as a form of pressure on journalists (rsf.org, 2024). Since then, no new changes in Kazakh media law have been made.

Reporters Without Borders emphasizes that only a handful remains independent media (Vlast.kz, Uralskaya Nedelya, Respublika.kz.media and the KazTAG news agency. – rsf.org/en/country/Kazakhstan, 2024). However, when professional or investigative journalists launch their projects on YouTube and Telegram, the authorities even use Internet outages to block this information.

Russians reactions to Kazakh actions in the media

Russia's official positions differ from the reactions of journalists and experts appearing on political talk shows. Dmitry Peskov, who has been the Russian president's spokesman since 2012, appealed not to pay attention to the opinion of some experts on Russian-Kazakh affairs (kaztag.kz, 2022)

"these political scientists do not in any way reflect the official position of the government or the Kremlin. This is how they should be treated. There is no need to listen and watch them at all" – D. Peskov November 27, 2022 (https://kaztag.kz/ru/, 2022).

This position was a reaction to the programme Evening with V. Solovyovy on the Rossiya 1 channel, in which experts called Kazakhstan the second biggest problem after Ukraine.

Similarly, in Andrei Norkin's broadcast of January, 24, 2024, the Russian historian Mikhail Smolin questioned the existence of nations such as Kazakhs, Uzbeks and Azerbaijanis:

"Look what Kazakhstan looked like. Initially, it was called the Kazakh Republic within the RSFSR. This means that there were no Kazakhs at all, and then the Kyrgyz ASSR was created within the Kazakh SSR. For example, Uzbeks never existed before the revolution. There was no such name as ethnic. They took and created Uzbeks from several Central Asian peoples. Who are the Azerbaijanis – there is no such nationality" – M. Smolin, NTV (uznews.uz, 2024).

The position – of the Ministry of Foreign Affairs spokeswoman Maria Zakharova softened the tone of this statement, which Zakharova called "disgusting," recalling that Russia and Central Asia were connected by history, trade, business and economic ties (uznews.uz, 2024).

Among these anti-Kazakh voices, the numerous statements by Tina Kandelaki, a Russian journalist of Georgian origin, predominate. This very well-known editor and propagandist in Russia, who was on the list of people subject to sanctions in Canada, publicly criticized Kazakhstan in the main programmes of Russian television for the country's language policy. Kandelaki was outraged by the plan to replace Russian names of railway stations with Kazakh ones. In an online post, the journalist wrote that the Russian language was discriminated against in Kazakhstan, which in turn was met with a sharp reaction from the Kazakh authorities. On 22 January 2024, Kandelaki was banned from entering Kazakhstan (rferl.org, 2024).

The Russian language in Kazakh media

It should be added that the situation of the Russian language in Kazakhstan is different than during the presidency of Nursultan Nazarbayev. The ex-president increased the role of Kazakh and sought to change the alphabet from grazhdanka to Latin. The current president, Jomart Tokayev, has adopted a different course of action, which shows that he is afraid of strengthening the status of the Kazakh language and reducing the role of Russian.

"Indeed, the language problem is of great political importance and, if handled incorrectly, may lead to irreversible consequences for the statehood and security of the country's citizens. We saw this with our own eyes in the case of Ukraine. A frontal attack aimed at raising the status of the state language and forcibly expanding the area of its use is counterproductive, as it

may destabilize interethnic relations. In addition, it is necessary to take into account the geopolitical background in which the longest land border in the world with Russia stands out" (informburo.kz/, 2020).

The number of Russians in Kazakhstan, which has almost 20 million inhabitants, has decreased to 3.43 million in 2022 or 4 per cent of the population (vedomosti.ru, 2022).

Conclusions

Russia's influence on the actions of the Kazakh authorities is highly visible, it even seems that some politicians' decisions in the media are a copy of Russian solutions, including those regarding foreign media. The work of investigative journalists is dangerous, and oppressive media law does not make it easier to obtain information. The attempts made so far to block Russian television channels by several younger Kazakh politicians indicate that they are tired of Russian propaganda, but also of a generational change that seeks the disappearance of the political spirit of the USSR. Contrary to the announced reforms, President Tokayev, has not improved the safety of journalists, who still face problems with access to information and are subject to threats and beatings. His conservative language policy does not allow for comprehensive and unequivocal changes in this area, because in his opinion it could lead to political destabilization, which already took place in January 2022. Kazakhstan's still too high political and economic dependence on Russia means that in the current situation Kazakhstan's full information independence is impossible to achieve.

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