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# C O N T E N T S



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# POLISH MINORITY OF ROMANIA. SOME GEO-DEMOGRAPHIC EVOLUTIONS

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**Abstract:** This article purpose is to obtain a cross section of life of Poles in Romania using methods of historical analysis. To achieve this we used a series of scientific data and various materials. A very important part of the study are the conversations with the Polish community. In the first part of this study, at the background of the short history of the Romanian state, are discussed first Polish-Romanian relations and the history of emigration over the centuries. The theme of the second part is the distribution and a number of Polish community in Romania in the twentieth and twenty-first century.

**Key words:** polish population, minority, emmigration, demography, Romanians

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## INTRODUCTION

National minority is a group of people which is distinguished by a lower population number from the rest of the inhabitants of the particular country. Members of the national minority have, or not, the status of the citizen. In addition, they have long and strong bonds with this country and the ethnical, cultural, religious and linguistic features distinctive from the rest of the population. At the same time they express their desire to recognize them as a minority. These criteria are fully characterizing minority of Poles in Romania[1].

[1] International laws protecting the rights of minorities (the definition of national minorities) [in;] society [in;] Eesti, http://www.eesti.pl/index.php?dzial=spoleczenstwo&strona=regulacje_prawne

Currently Poles community reaches about 4,000 people. The main concentration of the Polish population is at the south of Bukovina, others that are not so numerous, are in Bucharest, Hunedoara and other cities. For many generations Poles in Romania have maintained an awareness of belonging to the Polish nation, as well as knowledge of Polish language and traditions.

**DATA BASE AND METHODOLOGY**

Discussing this topic, "the Polish minority of Romania," we will refer to the territories that were at the time of the World War 1 and 2 within the borders of Romania, because they represent important new chapters in the history of the presence of Poles in Romania.

Aim of this study is to obtain a cross section of life of Poles in Romania up to the present times using the methods of historical analysis. At this work were used various materials like those from the scientific symposium held in Suceava, studies of the Polish community by publishing house “Bezdroża”, websites run by the most important Polish community organizations in Romania. Very important part of the study were the conversations with the Polish community and the possibility of using the MA thesis of Matei Catargiu under the title “The Poles in Romania until 1939”. The changes of the number of poles were taken from the National Statistic Office in Bucharest.

This work is divided in two parts. In the first part, at the background of the short history of the Romanian state, are discussed first Polish-Romanian relations and the history of emigration over the centuries. The theme of the second part is the distribution and a number of Polish community in Romania in the twentieth and twenty-first century.

**HISTORY OF THE POLISH EMIGRATION TO ROMANIA**

Romania is a country situated on the Carpathian and Danube land, has a rich history of many centuries of which any European country would not be embarrassed. The history of Romania is not the focus of this work; nevertheless we find it important to outline it as it forms the basis of our argument. Thus, we will briefly describe Romanian international relations and influence of other countries as well as describe transformations which the country had overcome.

We can date back the origins of Romanian state from 13th and 14th centuries. This is when Wallachia and Moldova have emerged. Over the 15th century this pre-Romanian lands were under the threat from Turks, Poles and Hungarians. In the 18th century the threat was Russia and Austria. Transylvanian lands were mainly influenced by the Hungarians and Turks. In the 17th century Transylvania was controlled by Habsburgs[2].

Eighteenth century was a period of growing influence of Russia and Austria (Habsburg Empire). Habsburg, have managed to take control over Wallachia - Oltenia. In 1775, the Austrian Empire occupied the north-western part of Moldavia (Bukovina), while the eastern part of the principality - Bessarabia in 1812, was occupied by Russia[3].

In the second half of the nineteenth century, the Treaty of Paris (1854) granted the Turkey the control over Moldavia and Wallachia. In 1859 Aleksandru Joan Cuza became the prince of Moldova and later of Wallachia.

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[2] History of Romania [in:] The Romanian Community of WA INC, http://www.romwa.org/history.php

[3] History of Romania, p.1.

This was recognized by Turkey and Cuza was able to announce national unification[4], “in this way, a state which has started using the name of Romania was created”[5].

In 1877, Russia declared war against Turkey; this had prompted Romanian politicians to join the struggle against Ottoman Empire. As a result Romania gained its independence in 1878 that was confirmed by the Congress of Berlin. The same year Romania had received the lands of northern Dobrudja. In 1881 Romania became a Kingdom, headed by King Carol I. Nevertheless, Transylvania and Banat had remained under the control of Habsburgs[6].

Another important moment for the Romanian people was the end of the World War 1. The territory of the country has expanded, Banat, Transylvania, Bukovina, the southern part of Dobrudja and Bessarabia were joint. Great Romania was established with twice bigger territory and population than of the Kingdom that existed before the war[7].

The end of the World War 2 was not as beneficial for Romania in terms of territory. On the basis of the Treaty of Paris of 1947, Romania lost Bessarabia, northern Bukovina, and southern Dobrudja. In the coming years Romania was under the influence of the Soviet Union, creating the Socialist Republic of Romania (1947-1989). Since the 1960s, the Romanian government managed to escape from the Soviet Union’s direct influence. Nicolae Ceauşescu became the head of the Romanian Communist Party in 1965 and became the head of state in 1967. The year 1989 brought the end of the communist regime in Romania without any changes to its territory national. Today, Romania is a republic with parliamentary-presidential system (semi-presidential)[8].

**First traces of Poles in Romania**

The first Polish – Romanian cultural contacts can be track back to the creation of the first units of the state on the lands of Romania - Moldavia and Wallachia, in the thirteenth and fourteenth centuries.

Romania for the first time is mentioned in Polish writings in the early fourteenth century, when Poland was ruled by King Casimir the Great (1333-1370) who in 1366 moved border of Poland up to Moldova[9]. This is when political and military ties between Poland and Moldova are starting to emerge with some regional differentiations. Weaker contacts occurred between Poland and Wallachia, while stronger between Poland and Transylvania. These ties have developed over centuries[10].

Close neighborhood meant political influence: the Polish kings intervened in the affairs of the Moldovan principality. These interventions part of the political program of the Jagiellonian dynasty, who wanted to gain control over the trade

[4] History of Romania, p.1.
[5] Catargiu M., Outline of the history of the Romanian state [in:] Chapter 1. History of emigration Poles [in:] Poles in Romania up to 1939 year, University of Adam Mickiewicz, Teology Faculty, Poznan 2003, page 12.
[6] History of Romania, p.1.
[7] History of Romania, p.1.
[8] History of Romania, p.1.
[9] Rezachevici C., Polish Crown Relationship with Moldovan. Where the battle took place under "Plonini" (July 1368)? [in;] Closer together. Poles and Romania and the history and cultural heritage of Europe. Materials from the symposium. Wyd. Grup Musatinii, Suceava 2007, page 155.
[10] Catargiu M., Polish - Romanian Realtions [in] Chapter 1. History of emigration Poles [in:] Poles in Romania up to1939 year, University of Adam Mickiewicz, Teology Facultate, Poznan 2003, page 15.

route, which linked the North Europe with the South, from the Baltic Sea to the Black Sea[11]. The aim was to export Polish cereal crops from: Gdansk, Cracow, Lvov, Hotina, Suceava, Galați or Cetatea Albă to Constantinopol and Pery[12].

Border fighting and an expedition into Moldova occurred from 17th century. It should be emphasized that despite the wars, Moldovan-Polish relations were not always negative. From the beginning, Moldavian rulers were interested in the Polish craft, as at that time it was respected for its quality. Privileges were being granted to Polish magnates in order to enable them creating trading houses in important cities. Sometimes Poles received lands from influential rulers in exchange for different favours. At that time cross Polish-Moldavian marriages was wery common[13].

Frequent political and cultural contacts created convenient conditions for the diffusion of Catholicism. The first Catholic diocese at the area of Moldova was created on 9th of March 1371 in the Siret. The first bishop was a Franciscan monk Andrzej Wassilo from Jastrzębica, called as ”Andrzej from Cracow”[14]. The later period the bishopric was transferred first to the Suceava, and then to Bacău where survived up to the 18th century. Most of the bishops at that territory were Poles[15].

When it comes to Transylvania - the Polish Brothers or so called Arian Brothers, a religious community which was separated from the Evangelic – Refomists church, had come to this area to spread their religion. In 1658 the Polish Goverment motivated by Catholic principles has issued legal acts binding Polish Brothers to leave Poland. The Majority of them settled in Transylvania[16].

To sum up, Polish-Romanian relations began with the Polish-Moldovan neighborhood. This relationship had politico-military and economic (trade, crafts) character. There was also some religious influence of Polish Catholicism on Romania as well as influx of Polish Protestants. In the area of Transylvania, the first traces of Poles were associated with a group of Aryan (Polish Brothers), who were expelled from the country.

### History of emigration of the Polish people to Romania

The first trace of Poles in the lands of Romanians goes back to the beginning of the thirteenth century - their character was military, political, economic, cultural and also linked to the development of the Catholic religion. However, emigration that is in the focus of this essay- that is the permanent settlement- had begun in the late eighteen century. We can distinguish two types of Polish emigration to the Romanian lands. The first group includes political emigration, the second is economic emigration.

Political emigration to Romania has been relatively small and it is not possible to determine how many of the immigrants settled permanently. Economic immigration presents a completely different picture - in terms of

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[11] Catargiu M., p.15.

[12] Petrică I., History of Polish community in Romania[in;] *History*.[in;] Union of Poles in Romania. Polish House in Bucharest, , http://www.dompolskibukareszt.ro/istoric_pol.html

[13] Petrică I., p.1.

[14] Catargiu M., p.18.

[15] Pieszczoch F., Moldovan-Polish relations in the second half of the nineteenth century [in;] Closer together. In the circle of Polish-Romanian relations. Materials from the symposium,Wyd. Grup Musatinii, Suceava 2005, p.135.

[16] Petrică I., p.1.

quantity and in terms of permanent settlement. While political emigration included mainly political intelligence, we can talk of economic emigration of mainly peasants, people without possession and seasonal workers[17].

In 1669 Austria attached Transylvania and Banat areas to its Empire. In 1775 also north Moldavia was joined and since then the name Bukovina was given to the region. In this period the Republic of Poland was after the first Partition land (1772) in which Austria grabbed the area of Polish Galicia to its territory. Bukovina and Galicia constituted one state ruled by one emperor. The Habsburg Empire had grown in power starting an intensive processes of changes of the new lands. This was particularly convenient in Bukovina - area sparsely populated with many areas for settlement[18].

The first actions taken by Austrain authorities on newly gained territory were concerning the exploitation of natural resources - mainly salt deposits. In 1784 salt mines built in Solca, Cacica, Slatina Mare, Slătioara, Trestioara and Pleşa. In 1792, authorities of the Austria officially brought to Cacica 20 Polish mining families from Bochnia in Galicia and later on from Wieliczka (Galicia) as well. The salt mine Cacica was developed rapidly under the guidance of Polish specialists. They contributed to the development of the whole village. In 1810 the numbers of inhabitants in Cacica village was 305 and in 1818 the village was almost entirely Polish[19]. Despite the salt mine, the important role in the life of the village was played also by the school and by the church. During this period school classes were lead in four languages: Polish, Romanian, German and Ukrainian. The church was built in 1807-1810 mainly from the efforts of Father James Bogdanowicz, employee in the salt mine[20].

In the early nineteenth century the first wave of emigration of Polish highlanders to Bukovina took place; it was followed by waves in 1860-1880 and 1900-1910. Most of the highlanders came from the northern part of the Silesian Beskid, Beskid Zywiecki and Kisucy River, from the area Czadeckiej. Since the year 1803 due to overpopulation in Polish villages the migration was mainly made of highlanders czadeckich whose destination were Cernăuți, Cacica, Siret and Huta Veche[21].

The rapid influx of Polish settlers was the reason of emergence of new villages and towns. In the year 1834 mining families created a new village called Solonețu Nou. Two years later the highlander families from Caliceanca moved to the south of Bukovina and this had started Pleşa village. Residents from Tereblești and Huta Veche had joined them later. In 1842 the other group Poles from Tereblești and Huta Veche in cooperation with the German families founded the Poiana Micului village[22].

In 1850-1870 the migration of Polish settlers from the area of Rzeszow and Tarnow took part[23]. This group of people came into the Bucovina and settled in

[17] Catargiu M., History of emigration Poles in Romania [in:] Chapter 1. History of emigration Poles [in:] Poles in Romania up to 1939 year, University of Adam Mickiewicz, Teology Facultate, Poznan 2003, page 25.
[18] Catargiu M., pp.26-27.
[19] History [in;] Polonia in Romania. Association of Poles in Cacica, http://www.cacica.eu/
[20] Petrică I., p.1.
[21] Catargiu M., pp.28-29.
[22] Ostrowski T., Polonia in Bucovina [in;] Bukovina region of gentleness, Tourist Guide, wyd. Bezdroza, Krakow 2001, p.81.
[23] Catargiu M., p.32.

villages such as Ruda (today is Vicşani), Bulai (Moar) and Mihoweni near Suceava. They had emigrated from their fatherland due to natural disasters: epidemic outbreaks and locusts plague[24].

The second most important destination of Polish immigrants was Moldova, and particularly Bessarabia. Most Poles in Bessarabia started arriving in there in 1840 from the Duchy of Warsaw; among them were farmers, craftsmen, and soldiers of the former Russian army. A large group of immigrants joined host country's intelligence circles: they became officials, doctors, teachers, but also attracted other persons[25].

At the end of the nineteenth century Poles were coming to the lands of Romanian looking for work in the oil industry. They mainly came from Galicia, and as respected engineers, quickly found work in Ploieşti, Brazi, Câmpina and Buştenari[26].

At the turn of the century emigration of Poles into Transylvania took place. It included mostly miners from the area of Rzeszow, Tarnobrzeg, Kolbuszowa[27]. Migrants were finding work in the coal basin, in cities such as: Valea Jiului, Petroşani, Lupeni[28]. At the same time, the glass industry developed on the lands of Romania (an example of glass factory is Turda) – this gave Polish workers more employment opportunities[29].

Labour migration has resulted mainly in the settlement of Polish population in Romania. Nevertheless, this process can be simply called a 'movement' as Galicia and Bukovina formed one state in years 1849-1918. Emigration was caused by overcrowding of villages in Galicia, which was leading to famine and very high unemployment. Thus, labor migrants were mainly peasants, although there were some mine workers, steel workers who due to unemployment in Galicia were looking for opportunities in other parts of Habsburg Empire. Emigration occurred first of all to the area of Bukovina, secondly to Moldova. This group consisted mainly from peasant farmers. Another group of emigration, they were workers-miners, steel workers, they settled in different towns in Romania, depending on job opportunities.

Political emigration occurred mainly after uprisings in Poland in the nineteenth century. The main group of immigrants was formed by soldiers, refugees and the intelligent group of Polish. The first of this kind of migration took place after the Kosciuszko's Uprising in 1794 and third partition of Poland in 1795, when Poland disappeared from the map of Europe. Insurgents emigrated following the motto: "Who loves the homeland lets hurry to Wallachia". Many Poles sought refuge in Moldavia and Wallachia[30].

Further political emigration took place after the events of the November Uprising in 1830. Then, about 3,000 military soldiers escaped to Transylvania and Moldavia. The strongest group of Polish political emigration was concentrated in Moldavia, as Moldovan boyars were providing assistance for Poles[31].

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[24] Ostrowski Tomasz , p.81.
[25] Catargiu M., pp.33-34.
[26] Catargiu M., p.34.
[27] Catargiu M., p.34.
[28] Poles in Romania [in;] Consular Information, Polish Embassy, http://www.bukareszt.polemb.net/index.php?document=93
[29] Catargiu M., p.34.
[30] Petrică I., p.1.
[31] Petrică I., p.1.

In 1863 in Poland the January Uprising took place. Despite the initial successes it was ended with a defeat of the Polish Kingdom. Another wave of refugees moved to Romania: "the country which is most friendly and helpful". The largest Polish colony was in Bucharest (Bucureşti). In 1883 it was estimated that around 1,000 migrants from Poland lived in there and in 1898 the number grew to about 3,000 people[32].

The end of the World War 1 brought the independence to Poland while Romania regained the area of Bukovina, Bessarabia, Transylvania and the southern part of Dobrudja[33]. For both countries this meant many changes and transformation in the pattern of migration. Romania has expanded its territory twice, which also meant increase in population and ethnic groups. For Poles it meant the possibility of going back the country and for those who decided to stay in Romania had to fight for the preservation of their national identity. Emigration of Poles after World War 1 to Romania was weak, nevertheless it had occurred[34].

Many Poles who returned to Poland, were primarily intellectuals, students and graduates. As a consequence Polish population disappeared from Iaşi, Suceava, Botoşani, Bucharest and the Bukovina area. Due to the loss of important societal group the social structure from the nineteenth century was disrupted[35].

In the years 1922-1924 Poles, largely workers coming from Malopolska were migrating mainly to Mediaş, where they were founding work in the glass industry. Another significant, but relatively migration group were Poles from Lodz and Bialystok looking for employment in textile factories[36].

The period of the World War 2 was the time of emigration of a large group of Poles to Romanian land. This emigration did not have settlement character. Most of the arriving people were refugees escaping the harsh reality of war and early post-war years.

According to statistics available from the Polish Embassy in Bucharest, in September 1939 approximately 26,000 Polish civilian refugees arrived to Romania. But by the end of 1939 most of them (about 11,000) left this country, followed in 1940 by approximately another 12,000 people. During the war, the number of refugees varied and by the end of the war in Romania there were about 5,000 of them[37].

The first years after World War 2 brought significant changes in the structure of the Polish community in Romania. During years 1948 - 1950 few re-migration transports to Poland and Czech-Slovaks Republic were organized. Poles who decided to go back to Poland were arriving and settling in the west part of Poland, from Silesia up to Pomorze, as this newly gained by Poland territory offered them many opportunities. Many had decided to stay as they did not know what to expect from the post-war reality in Poland[38].

People who decided to departure to Czechoslovakia encountered many problems. Among them the most important ones was first of all the language and secondly large Hungarian settlement taking place at the same time. It is proven that, the Polish language despite its similarities with Czech and Slovak, possess

[32] Petrică I., p.1.
[33] History of Romania, p.1.
[34] Catargiu M., p.34.
[35] Catargiu M., p.34.
[36] Catargiu M., p.34.
[37] Poles in Romania, p.1.
[38] Ostrowski T., p.86.

many differences – particularly when we take into consideration that very often arriving Poles had to learn existing dialects. At that time Hungarians who were expelled from areas of Slovakia, were hostile to the Poles settling in their homesteads. The issue of national identity came up - a lot of people decided to admit to different nationality as a result of pressure from their families or for the political reasons[39].

Despite different doubts many Polish people went back to Poland. In the period from 1946 to 1950 about 9,000 Poles re-emigrated (according to data from the Polish Embassy in Bucharest). From this number, we can identify three groups of Poles; Poles with Romanian citizenship mainly from Bukovina region (4,858 people), Polish citizens who arrived to Romania before War World 2 (169 people), Polish citizens who arrived after the events of September 1939 (4,198 people)[40].

After the re-migration at the Romanian territory in 1950 there were more than 6,000 former settlers mainly in the region of Bukovina and about 1,000 refugees left. Groups of refugees settled mainly in Bucharest, Craiova, Râmnicu-Vâlcea, Constanța, Ploieşti and Piteşti where today live their descendants[41].

During the communism period the number of the Polish minority was steadily decreasing due to the difficult living conditions[42]. After the political changes in Romania in 1989 there was a small increase in Polish population due to the re-organisation of the structure of the minority which very quickly became active in all important fields for them[43]. As it was outlined in the history of Romanian lands, the largest group of Polish community still lives in the southern Bukovina (province Suceava), another region with high number of Poles is Bucharest, Timiş, Hunedoara and others[44]. Currently many Polish families are coming to Romania from various reasons and many students are staying temporarily for scholarship programs or internships. On the other hand many young people from the regions of Bukovina decide to go to Poland to study.

## DISTRIBUTION AND ABUNDANCE OF THE POLISH MINORITY IN ROMANIA

Changes in the number and distribution of Polish people in Romania are related to the history of the Polish and Romanian states. Determining the precise changes in the number of Poles within the boundaries of Romania can be prove very difficult, as we cannot give reliable numbers of Poles, as there are many sources stating different numbers. This chapter describes the demographic changes of the Polish minority in the XX century based on data from the National Statistic Office in Bucharest. The Office draws its data from population censuses conducted in years 1930, 1956, 1992, 2002 carried out in regions (provinces); censuses conducted in municipalities and cities in 1930, 1966, 1977, and 1930 census conducted in regions and cities (data analysis was performed using program ArcMap and Excel).

In order to explain changes in the number of Polish minority in Romania in the first half of the 20th century we used available, although sometimes biased, academic sources.

[39] Ostrowski T., p.87.

[40] Nowak K., Polish diplomacy and Poles in Romania after 1945 [in;] Closer together. Poles and Romanians and the historical and cultural heritage of Europe. Materials from the symposium, Wyd. Grup Musatinii, Suceava 2007, p.272.

[41] Poles in Romania, p.1.

[42] Data from National Statistic Office in Bucharest.

[43] Ostrowski T., pp.88-89.

[44] Data from National Statistic Office in Bucharest.

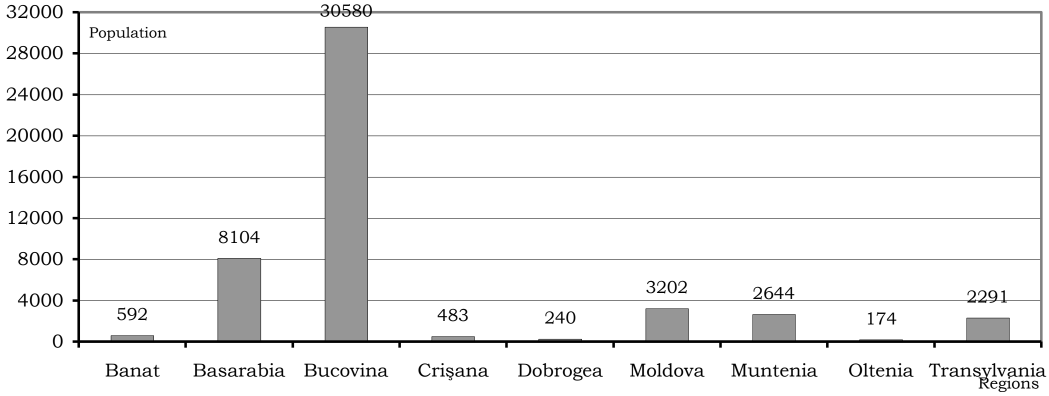


**Figure 1**. Number of Polish people in Romanian regions in 1930
(Source: Own research based on data from The National Statistical Office in Bucharest)

The above graph shows the number of the Polish population in the interwar period. In these years, Bukovina and Bessarabia belonged to the Romanian Principality. These were the regions were majority of Poles lived since they immigration in the 19th century motivated by economic and social factors (overcrowding, natural hunger, disease). In other regions the number of Poles did not exceed the threshold of 4,000, the largest number of Poles were in regions where the industry was developed. Also, in Muntenia significant role was played by the country's capital, where during the war and during the interwar period there were created by Polish emigrants organizations.

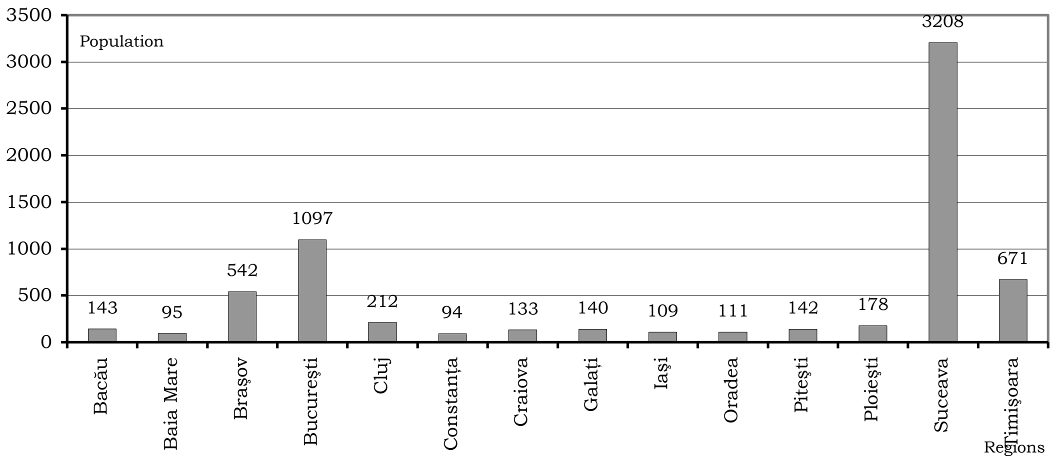


**Figure 2**. Number of Polish people in Romanian regions in 1956
(Source: Own research based on data from The National Statistical Office in Bucharest)

The above graph shows the Polish population in 1956. We can see that after World War 2 Romania lost the north part of Bukovina, Bessarabia and the southern part of Dobrudja. The largest decline of the Polish population was in the province Suceava – from 30,580 people in 1930 to 3,208 people in 1956. The decrease in population was caused by different factors: changes in state borders, emigration of Poles in their country, reduction of the population during the war.

Another area of the high decrease was Moldova. Before the war in this area lived over three thousand Poles but after the war only about 250 was left and they resided mainly in the provinces Iaşi and Bacău. This was caused by the same factors as in the area of Bukovina. Before the World War 2, in Muntenia, the Polish population had amounted to over 2,600 people, but after the war the number dropped by more than 1,000, this change possibly being based mainly on re-emigration. Changes in the number of Poles in Transylvania, and Crişana were due mainly to the repatriation in the years 1946-1950. In the area of the former land of historical Oltenia and Banat, the number of Polish population decreased slightly. In Dobrudja the state of the Polish population has not changed. An additional reason for the change of the number of Polish people was a change of nationality after the war, to Romanian, Hungarian, or German and others[45].

To sum up, in the first half of the twentieth century, changes in the number of Polish population occurred mainly due to the war, changes in state borders, organized re-emigration, and adopting other nationality.

The tables above show the number of population in selected cities and municipalities. We can see that between 1930 and 1960 there have been major changes in the number of Polish population in Moldova, Wallachia and Transylvania, caused by the war, re-emigration, change of nationality.

Only in Cacica, Poiana Micului and Suceava (Table 1) Polish population remained large as of 1966, and also in Suceava in 1977. In our opinion this is the result of a nostalgia and attachment to the region.

**Table 1**. The number of Polish people in Moldova, in cities and municipalities, in 1930, 1966 and 1977
(Source: Own research based on data from The National Statistical Office in Bucharest)

| Cities | 1930 | 1966 | 1977 |
|---|---|---|---|
| Bacău | 210 | 13 | 16 |
| Bârlad | 29 | 1 | |
| Botoşani | 137 | 13 | 9 |
| Cacica | - | 377 | - |
| Buhuşi | 222 | 4 | - |
| Câmpulung | 97 | 35 | - |
| Focşani | 54 | 9 | - |
| Galaţi | 330 | 30 | 6 |
| Gura-Humorului | 161 | 39 | - |
| Iaşi | 505 | 40 | 27 |
| Paşcani | 210 | 10 | - |
| Piatra-Neamţ | 130 | 11 | 6 |
| Poiana Micului | - | 333 | - |
| Rădăuţi | 184 | 74 | - |
| Roman | 148 | 14 | - |
| Suceava | 433 | 220 | 221 |
| Vatra Dornei | 153 | 24 | - |
| Vaslui | - | 2 | 1 |

In the area of Wallachia, the greatest changes have occurred in the capital, and in the cities of Ploieşti and Brăila. In the capital remained a group of Poles who were linked to the organizational activities of the Polish community during the war. However, in 1977 we can see new places of settlement of the Poles, which may be due to the change work, for example, from the Craiova to Mehedinţi and others.

[45] Poles in Romania, p.1.

**Table 2**. The number of Polish people in Wallachia, in cities and municipalities, in 1930, 1966 and 1977
(Source: Own research based on data from The National Statistical Office in Bucharest)

| Cities | 1930 | 1966 | 1977 |
|---|---|---|---|
| Brăila | 139 | 14 | 5 |
| Bucureşti | 1650 | 655 | 319 |
| Buzău | 29 | 6 | 1 |
| Craiova | 73 | 24 | 8 |
| Dolj | - | - | 30 |
| Gorj | - | - | 4 |
| Ialomiţa | - | - | 6 |
| Mehedinţi | - | - | 7 |
| Olt | - | - | 7 |
| Piteşti | 34 | 9 | - |
| Ploieşti | 200 | 31 | - |
| Prahova | - | - | 19 |
| Târgu Jiu | 7 | 2 | - |

There were less Poles in Transylvania than in Moldavia and Wallachia. The biggest change in population number had occurred in Oradea, Satu Mare, and Mediaş, between 1930-1966. The effect of the change in population in these first two cities, can be explained by their close to border location - parts of the population could settle in Hungary. Lupeni, Mediaş and Hunedoara are cities which were developed because of the glass and coal industry, where many Poles could find work, and this argument can explain such large numbers. Sibiu, Braşov, Cluj Napoca are also well-developed cities where the Polish minority could find work in other industries.

**Table 3**. The number of Polish people in Transylvania, in cities and municipalities, in 1930, 1966 and 1977
(Source: Own research based on data from The National Statistical Office in Bucharest)

| Cities | 1930 | 1966 | 1977 |
|---|---|---|---|
| Alba | 15 | 6 | 13 |
| Bihor | - | - | 17 |
| Braşov | 53 | 97 | 67 |
| Cluj | 76 | 72 | 42 |
| Hunedoara | - | - | 170 |
| Lupeni | - | 282 | - |
| Mediaş | 144 | 75 | - |
| Mureş | - | - | 36 |
| Oradea | 69 | 37 | - |
| Petroşani | 35 | 53 | - |
| Satu Mare | 54 | 4 | 3 |
| Sibiu | 62 | - | 96 |

**Table 4**. The number of Polish people in Banat, in cities and municipalities, in 1930, 1966 and 1977
(Source: Own research based on data from The National Statistical Office in Bucharest)

| Cities | 1930 | 1966 | 1977 |
|---|---|---|---|
| Arad | 106 | 101 | 49 |
| Timişoara | 101 | 149 | 90 |

In the area of Banat, there were no major changes in the population of Poles. The reason for this could had been good living conditions and also the distance from re-emigration centers in Bukovina and in Wallachia that were spreading re-emigration ideas; as the result the Polish group tied to this land and did not think about returning to their country.

In Dobruja, we can see a 50% reduction from 1933 to 1977, which might be due to the change citizenship after the war, a change of residence, or return to the home country.

Table 5. The number of Polish people in Dobrogea,
in cities and municipalities, in 1930, 1966 and 1977
(Source: Own research based on data from The National Statistical Office in Bucharest)

| Cities | 1930 | 1966 | 1977 |
|---|---|---|---|
| Constanța | 82 | - | 43 |
| Tulcea | 10 | 9 | 6 |

These maps represent provinces inhabited by Poles. In Moldova the Polish did not change their residence during the analyzed decades. In Transylvania minor changes occurred: in 2002 the Poles no longer live in Bistrița-Năsăud county. The situation changed in the region of Banat; in 2002 Poles lived only in Timiş county. The reason might be the greater development in the northern part of Banat. The southern part of the country have changed more, the Poles live in the provinces Buzau and Gorj. This could be explained by employment migration.

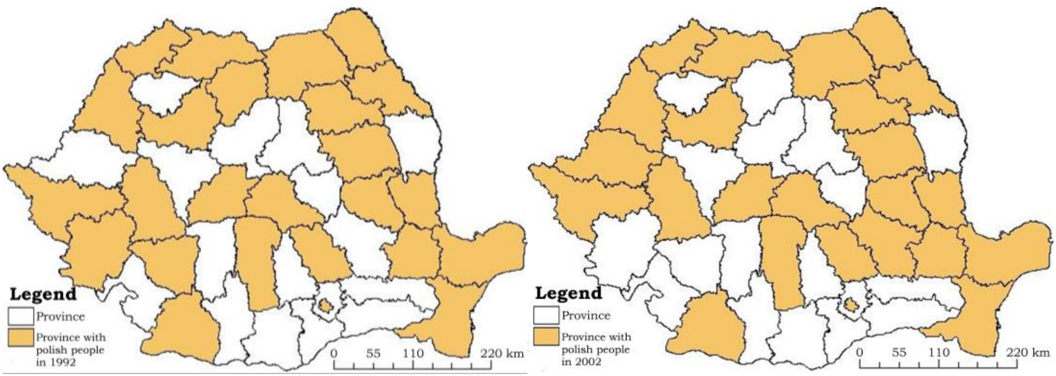


**Figure 3**. Poles living in the different provinces in 1992 and 2002
(Source: Own research based on data from
The National Statistical Office in Bucharest – in program ArcMap)

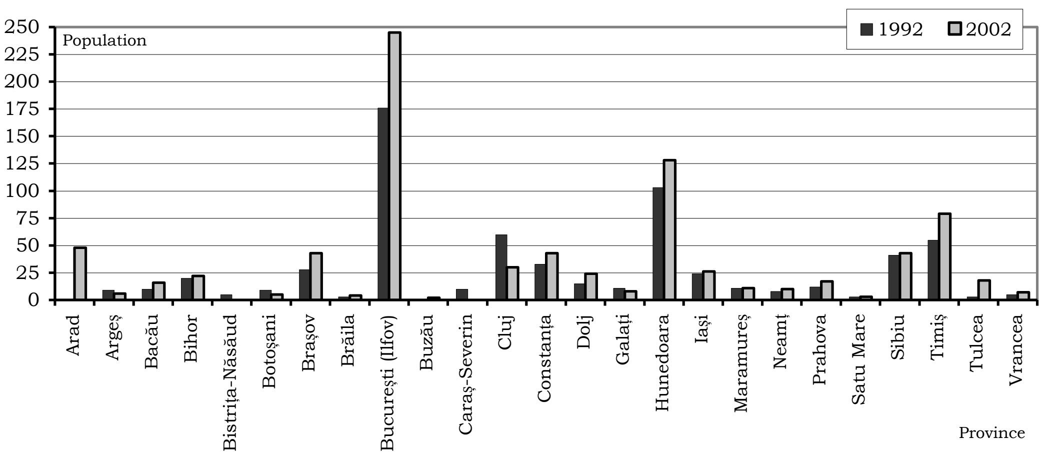


**Figure 4**. Number of Polish people in Romanian provinces in 1992 an 2002
(Source: Own research based on data from The National Statistical Office in Bucharest)

The above chart shows changes in the number of Poles between 1992-2002 (excluding the province of Suceava, which has been discussed in the Figure 5). In the capital, the number of Polish population increased by almost 100 people, which is due to the arrival of new families and the development of the Polish capital. Also the reason for the increased number of Poles in the province of Hunedoara may be finding work in mining and metallurgy factories. The reason for the increased number of Poles in Constanța, may be the possibility to work in the tourism industry. A significant increase in the number of Poles has also appeared in Timişoara and Braşov; a smaller increase in Iaşi, Vrancea, Prahova, Dolj, Brăila, Bihor. These may be related to the development of these cities in the 90s. Population decline occurred in Cluj Napoca, Argeş, Botoşani.

Summarizing, the main increase in the number of Poles in the cities is due to better living conditions, the possibility of finding work, the development of cities and towns and active organization of the Polish community.

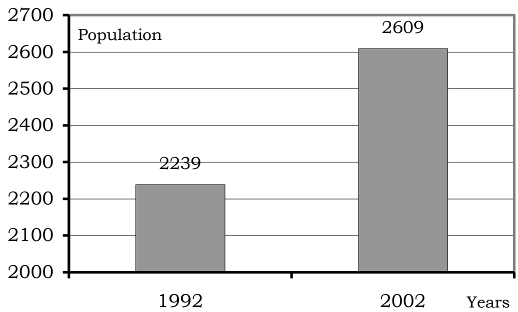


**Figure 5**. Number of Polish people in Suceava county
(Source: Own research based on data from The National Statistical Office in Bucharest)

This figure shows the number of Polish people in the Suceava county between 1992 and 2002. Significant population growth is due to activation and joint action of the Polish community in the direction of the rebuilding of their life in Romania, as well as the improvement of living conditions.

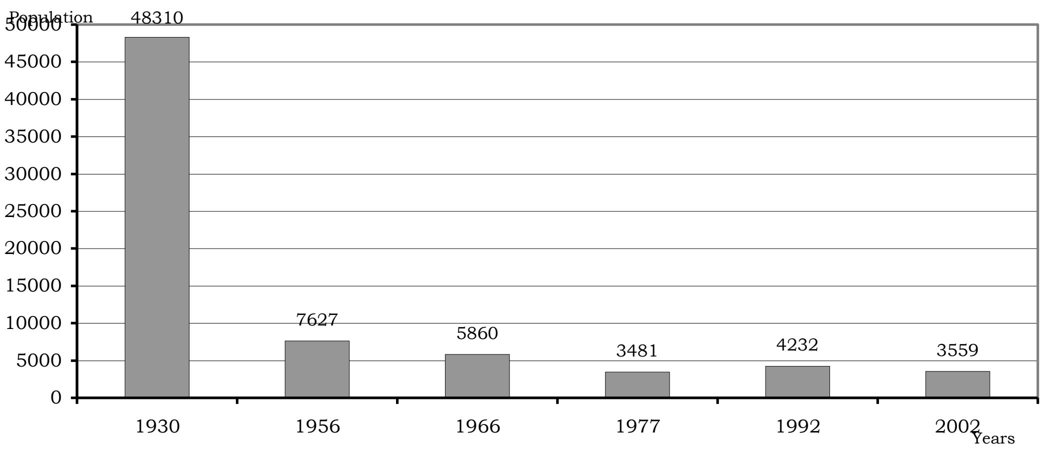


**Figure 6**. Changes of number Polish people in Romania in the years 1930-2002
(Source: Own research based on data from The National Statistical Office in Bucharest)

The above chart applies to the overall change in the number of Polish population in Romania in the twentieth century. After the World War 1 the Polish minority was the largest in the Romanian Principality – the high numbers were especially in Bukovina and Bessarabia. After World War 2 the situation reversed. The number of the Polish population has declined several times, the reason being the change of borders, organized re-emigration to Poland, the change of the national identity, a time of war and human loses.

Under communism the Polish community steadily decreased. This was caused by restricted rights for minorities and poor living conditions. Since 1992, a slight increase in population can be noted. It is linked to the political changes and the activity led by minorities. A slight decrease in population appeared in 2002, caused by few families' relocation to Poland. The Polish minority can be expected to grow because of the attachment to the region (particularly to Bukovina, and Bucharest region) and also because of the arrival of new families from Poland, due to the development of the capital and other regions.

**CONCLUSIONS**

Polish - Romanian contacts started at the beginning of the thirteenth and fourteenth centuries. Initially they had mainly political and military character. With the time flow mutual economical, cultural and everyday life relations continued to deepen. Parallel Catholic religion was developing on the Moldovan territory, which as well resulted in the presence of Poles. To the Transylvania's lands came group of Polish Brothers (Arian), Protestant followers which were expeled from Poland.

Polish immigration began with the joining Bukovina to the Habsburg Empire in 1775. First group of Poles came to Bukovina within the settlement policy pursued by the Austrians (forced emigration of miners to Cacica). Subsequent emigrations of the Polish population had mainly livelihood character. Beginning of the nineteenth century was a time of a settlements of highlanders from the Czadecki area. Successive waves of emigration of Polish highlanders had reached the land of Bukovina in years 1850-1870. In the mid-nineteenth century many Poles settled in Bessarabia. In the late nineteenth and early twentieth century emigration of Poles have occurred in the area of Transylvania, where they settled mainly in the cities with developed mining and glass industry. Labour migration has resulted that mainly Polish people settled in the lands of Romania and the place of settlements was mainly Bukovina.

However, political emigration took place mostly after the events of the uprising in Poland in 1830 and in 1863. But it did not caused major settlements of the Polish population in Romania. After World War 1, when Poland regained its independence, part of the Poles decided to return to their country. They were mostly refugees and a group of intelectuals. However, the most numerous returns to the Poland took place after World War 2. At that time, more than half of Poles have returned to the Poland or Slovakia. During communism, there were no emigration or remigration of Polish population.

The largest polish concentration until the present time is the Bukovina (today Suceava region within the boundaries of Romania). The second region of polish settlements was Bessarabia, represented by Republic of Moldova today. Beside of these regions there are few and scattered Polish centers throughout Romania which are mainly associated with the possibility of work in different industry branches.

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# UKRAINIAN CROSS-BORDER SHOPPERS INFLUENCE AT THE POLISH AND ROMANIAN BORDERS. A COMPARATIVE STUDY FROM SUCEAVA AND LUBLIN

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**Abstract:** Shopping became nowadays a leisure-connected activity, transforming from a primary necessity into a self-identity statement and a social barometer. Cross-border shopping is a unique type of shopping that consists in people travelling beyond the boundaries of their country, with the precise purpose of acquiring goods for personal use on the other side of the border. The following paper brings into debate the cross-border shopping tourism activities developing at eastern external borders of European Union. Ukrainians cross-borders shoppers, once regular customers in Lublin and Suceava, mainly dues to borders trade, now focus their visit on more personal trips. Their presence is minimal in both Lublin and Suceava, however the Polish city benefits from a higher number of Ukrainian cross border shopping tourists than the Romanian one.

**Key words:** shopping, Ukrainians, Suceava, Lublin, travel, trade, tourism

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## INTRODUCTION

The purchasing patterns changed fundamentally during 40-50 year, with customers demands extending beyond the need of a wider selection of goods and entering in a sphere of experience, where emotions and sensations are deifying factors in purchase decision, people focusing more on desire that on real practical needs (Danziger, 2006: xvi). Shopping in the vision of Williams et al. (2001) is the 'new retail geography', consisting from 'an elaborate sociological game played out in sites loaded with meaning' (Crewe, 2000 cited in Williams et al., 2001: 204). At this moment in time, we can visualise the transition of shopping, in the preference for the retail locations of people living in developed, developing or underdeveloped countries. In developed countries the new retail challenge has as a central point the mega-mall, a large retail space, which in the same time fulfils also the role of a an important family entertainment location (Shaw and Williams, 2004), while in underdeveloped countries the bazaars and open markets are the most common retail locations.

The transition retail locations are most visible in developing countries, where the new retail locations, develop neat the old retail locations, in a mix of preferences and generation, that makes the transition slowly, but profoundly from and old dying retail model based on pragmatic choices, to a new, vivid retail lifestyle bounded with leisure (Woodruffe-Burton et al., 2002).

Berger (1966), connects the changes in consumption and purchases patters to consumers' self-identity and the vision others have about them and their place in society. He concludes that it is common for people to behave and to consume thinks and objects, in order to impress others, so that others perception about them will gain social esteem, and as a result, their personal esteem and satisfaction will increase. A similar opinion shared Hogg and Michell (1996: 641), stating that 'consumption choices' do not limit at being 'single, simple and independent decisions', but a complex mechanism of 'interdependent decisions'.

In the context of retail transitions, in terms of meaning, space and location, doubled by the mobility of people (Timothy, 2005), shopping across the border, comes as a natural act, which joins practical needs with the desire for leisure. Economically viewing, cross-border shopping in borderland can have an important impact over the local commerce. Its flow of purchase power, although frequently goes unobserved by the local retailers, sometimes shapes the market demand. A business focus strictly on cross border shopping tourists it is a risky one, and will probably prove unprofitable in time, as the movement can always change direction or the customers can face unexpected difficulties in crossing the border. However, a business focus on both local demand and on shopping tourists' requests and expectations can be the wining card for a good development in cross-border region.

## CROSS-BORDER SHOPPING

Consumption across borders (Tömöri, M., 2010), a term that also describes cross-border shopping, refers to the activity of people travelling outside the boundaries of there own country with the target of shopping in the neighbouring one (Timothy, 2005). For these people shopping is the major dragging factor to take the trip. A shopping tourism activity can extend from a few hours to a few days, depending on the place of travel and the wish of the traveller. In the case of cross-border shopping tourism, the trips extend from a few minutes to a few hours (Figure 1.1), for tourists living near the borders, or to a few days, for tourist living farther from the border (Timothy, 2005).

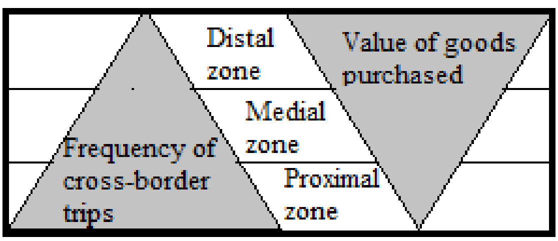


**Figure 1**. Spatial characteristics of cross-border shopping.
(Source: Timothy and Butler, 1995)

The most common cross border shopping trips are same-day round trips, allowing tourists to successfully utilise their leisure time, for shopping and other recreational activities.

There are four primordial conditions for cross-border shopping to appear and develop, mostly generated by the 'economical, legal, and social differences on opposite sides of an international border" (Timothy, 2005). The conditions, initially describes by Leimgruber (1988), later developed by Timothy (2001), are:

1. *Contrast* – there needs to be sufficient contrast between the local offer and the offer from the other side of the border. The difference has to be noticeable at least regarding one of the following thinks: selection of goods, quality of goods and price of acquisition.
2. *Awareness* - people have to be aware of what exists on the other side of the border, in order to get motivation for crossing the border. The awareness can be raised through information they receive from other cross-borders shoppers, through media or internet.
3. *Willingness to travel* - emerge from curiosity, interests, wishes and personal mobility. Many people consider shopping abroad as an entertainment activity, which they can practice together with their families. Their motivation for crossing the border can be stimulated or not, by the transport infrastructure and safety they would benefit on the other side.
4. *Border cross procedures* - have to be rather unproblematic and not very time consuming. Nowadays, there are more and more borders that can be cross with little formalities and even without visas, however their situation is not always stable, depending arbitrarily on the political changes. A big number of formalities can be very discouraging for people to make the trip to the other side, regards of the market contrast and their willingness to travel.

The reasons that contribute to the creation and maintenance of the cross-border shopping tourism are miscellaneous and changeable; however, they often give us the direction of the movement, from one country towards another. Sometimes the movement can go strictly in one direction and other times in both directions. The reasons for cross-border shopping obviously include the price benefits that are expected, but this is not the only criterion (Optem, 2004).

Timothy (2011) mentions a set of factors contributing to the appearance of cross-border shopping, which also influence its direction and intensity:

- Price level
- Tax rates
- Opening hours
- Exchange rate between currencies
- Availability of a wider range of products and services
- Fame and marketing
- Proximity to the border
- Language

The economical importance of cross-border shopping tourism was already underlined in scientific literature (DiMatteo, 1993, Timothy and Butler, 1995). However, a business focus strictly on cross border shopping it is risky, and will probably prove unprofitable in time, as the movement can always change direction or the customers can face unexpected difficulties in crossing the border (Bar-Kołelis and Wiskulski, 2012). The solution is the integration of cross-border shoppers' needs with local demand, which can offer stability at home and additional surplus of profits from visiting shoppers.

In East and Central Europe, cross-border shopping appeared as a natural result of border cross restriction removal. The core locations were the meeting points between the developed and developing economies (Powęska, 2008). With a daily character, more entrepreneurial motivated, than personal (Minghi, 1999), cross-border shopping trips quickly became a common activity mainly for people living in the borderlands (Hall, 2000). Price played a key role during the transition period as a key motivational factor for people to travel in order to complete their purchase. The other motivational factor was the availability of a wide range of goods, especially for the Romanian shoppers, accustomed to a limited choice during the communist period.

Described as 'bazaar capitalism' (Smith, 1997), the cross-border shopping activities conducted in Central and East Europe, were strongly focused on resale items rather than for personal-use items (Timothy, 2005). The practice demonstrated that there is a very thin line between cross-border shopping with the purpose of easing the family budget through shopping and resell and helping friends and relatives to purchase as well. From here to smuggling is just a small step, as sometimes it is difficult to make a clear-cut distinction between cross-border shopping and smuggling, and many researchers hold that cross-border shopping also consists of part of illegal foreign turnover carried out by the individual travellers at the border in connection with an unrecorded conveyance of goods (Powęska, 2008). However, as the political situation from East and Central Europe started to stabilize and the border cross procedures began to change, in some cases due to European Union regulations, in other by mutual agreements signed between countries, new trends in cross-border shopping were brought in by globalization. The trend implies a switch in travellers' motivations for crossing the borders, which focuses less on economical and trade factors and emphasizes more on leisure and tourism.

## THE POLISH POLISH-UKRAINIAN AND POLISH-ROMANIAN BORDER SECTORS

The Polish-Ukrainian border sector stretches on 528 km, being administratively represented on the Polish side by two voivodeship, Lubelskie and Podkarpackie. Lublin, with a population of 360 000 inhabitants, is the capital city of Lubelskie voivodeship, and Rzeszow with a population of 160 000 inhabitants, is the capital city of Podkarpackie voivodeship. On the Ukrainian side, the border adjoins with three oblasts Volyn, L'viv and Zakarpattia. Lutsk, with a population 255 095 inhabitants is the capital city of the Volyn Oblast, Lviv with 729 842 is the capital city of the Lviv oblast and Uzhgorod, located near the Ukrainian Slovakian border is is the capital city of Zakarpattia oblast, with 116 500 inhabitants.

The Polish-Ukrainian border region, do not present any geographical barriers that could have an impact on border interaction and despite the unsatisfactory road infrastructure, especially on the Ukrainian side of the border, the border cross facilities are sufficiently developed to facilitate the actual flows of people and goods. The Polish-Ukrainian border is mainly perceived primarily as socio-economical barrier, mainly due to the technical aspect of border cross procedures, characterise by long queues and custom officers inefficiency, rather than the demand of visa for Ukrainian citizens (Grama, 2011).

The border crossing point at the Polish-Ukrainian border are:

- *By road*: Budomierz – Hruszów; Dorohusk – Jahodyn; Hrebenne – Rawa Ruska; Korczowa – Krakowiec; Krościenko – Smolnica; Medyka – Szginie and Zosin – Uściług.
- *By railway*: Dorohusk – Jahodyn; Hrebenne – Rawa Ruska; Hrubieszów – Włodzimierz Wołyński; Krościenko – Chyrów; Przemyśl – Mościska and Werchrata – Rawa Ruska.

The total Romanian-Ukrainian border sector stretches on 649,4 km and consist of two pieces, one located on the north of Romania and dominated by Carpathian mountains, stretching on 440,1 km (Grama, 2011) and the other located in south-east of Romania, including as well a river and sea border. The following paper refers strictly to the north part of the Romanian – Ukrainian border, administratively represented on the Romanian side by four counties Satu-Mare, Maramures, Suceava and Botosani. Satu Mare, with a population of 102 441 inhabitants, is the capital city of Satu Mare county. Baia Mare, with a population of 123 738 inhabitants is the capital city of Maramures county. Suceava, with a population of 92 121 inhabitants is the capital city of Suceava county and Botosani, with a population of 106 847 inhabitants is the capital city of Botosani county. On the Ukrainian side, the border adjoins with three oblasts Zakarpattia, Ivano-Frankivsk and Cernivtsi. Uzhgorod, with 116 500 inhabitants, is the capital city of Zakarpattia oblast, Ivano-Frankivsk, with a population of 226 124 inhabitants, is the capital city of Ivano-Frankivsk oblast and Chernivtsi, with a population of 259 419 inhabitants is the capital city of Chernivtsi oblast.

The Romanian-Ukrainian border region is dominated by the Carpathian Mountains, with strong direct influence on the border traffic volume and purpose. With Romania joining the European Union, which determined a higher taxation on cigarette and alcohol, the border became strong smuggling point, the illegal traders taking advantages of this geographical aspect of the border.

The border crossing point at the Polish-Ukrainian border are:

- *By road*: Halmeu – Diakove; Sighetul Marmatiei – Slatina; Siret – Tereblecea, Tarna Mare – Heja; Ulma – Rusca; Vicovu de Sus – Crasna; Racovat – Probotesti.
- *By railway*: Halmeu – Diakove; Campulung la Tisa – Teresova; Valea Viseului – Dilove and Vicsani – Vadul Siret.
- *By foot*: Sighetul Marmatiei – Biserica Alba; Izvoarele Sucevei – Sipotele Sucevei; Climauti – Fantana Alba and Vascauti – Volcinetul Nou.

## CONSUMPTION ACROSS THE UKRAINIAN BORDERS

Consumption across the Ukrainian borders blends elements of trans-border trade with cross-borders shopping and petty trading. According to William and Balaz (2002), the trade across the border constituted an important component of the Ukrainian shadow economy in 80s and 90s. Okolski (1998) estimated that in 1993, from the half of million of Ukrainians travelling to Poland, the majority were traders.

The economical difficulties that Ukraine faced after 1989, lead to the erase of 'qualification-related differences in income and employment for large segments of the more educated population' (William and Balaz, 2002: 332), visible through the traders profiles. The Ukrainian traders travelling to Poland, Slovakia, Hungary or Romania for the acquisition of goods, were mostly young, usually well educated, many of them having professional jobs as engineers or teachers.

For these people, trading represented an additional source of income, beside their main profession. According to Iglicka (1999), some of the traders quickly became accustomed with the life conditions from Poland, expressing the wish to move to Poland permanently. In the vision of (William and Balaz, 2002), the petty traders represented an important lost of human capital for Ukraine formal economy, to the advantage of the informal economy.

With time, the character of trading changed, for some traders this additional source of income, becoming the primary one, which developed in acquisition trips that extended feather to countries like Turkey or Western Europe (William and Balaz, 2002). In Romania, at the border of Botosani and Suceava, the Ukrainian cross-border shoppers were part of daily customers, from the beginning of 90s, almost until Romania joined the European Union, and the border regulations, as well as the prices of goods significantly reduced the cross border shopping traffic. It developed in return, regular trips of Romanians in Ukraine, for fast moving consumer goods, which were cheaper on the Ukrainian side of the border.

The intensity of cross-border trading diminish when the imbalances between Ukraine and Poland reduced, the border cross shopping activities moving from the trade characteristic to a more personal one, involving more acquisitions for personal use than resell.

## LUBLIN AND SUCEAVA COMPARATIVE STUDY ON UKRAINIAN CROSS-BORDER SHOPPERS

In the period June-December 2013, the authors conducted a research at the Ukrainian borders with Romania and Poland, analysing the cross border shopping activities undertaken by Ukrainian cross border shoppers and their impact on local retail markets. The research was conducted in the Polish city Lublin and in the Romanian city Suceava. The research aimed to analyse the Ukrainian cross-border shoppers through the perspective of local retailers or shop assistants of international retail companies. The purpose of the research was to establish the presence and impact of Ukrainian cross-border shoppers in a parallel study.

The research comprises all types of retailers located in shopping centre, including pharmacies, libraries and flower shops, services usually focus on local customers. The research excluded the coffee places and food locations, where the contact with customers is minimal and the respondents were not able to distinguish between foreign and local customers. The research was conducted through questioners with closed answers.

The results of the study concluded that the presence of Ukrainian shoppers proved to be more intense in Lublin than in Suceava (Figure 2), where 21 % of the respondents declared to encounter a minimum presence of one shopper from Ukraine daily. The majority of respondents (32%) declare to have at least one time per week a customer from Ukraine. In Suceava, the majority of respondents (30%) declared to have one customer from Ukraine at least one time per two weeks, while the second biggest percentage (25%) declare to have at least one shopper from Ukraine one time per month.

In the next step, the respondents were asked to categorize the impact of Ukrainian shoppers on the retail market from Lublin, respectively Suceava (Fig. 3). The majority of retailer from Suceava (53 %) classifies the Ukrainian shoppers' impact as very small. On the Polish side, only 8% from responders had a similar opinion with the Romanian majority. In the opinion of the majority of Polish retailers (37%), the impact of Ukrainian shopper on the retail market from Lublin was very big.

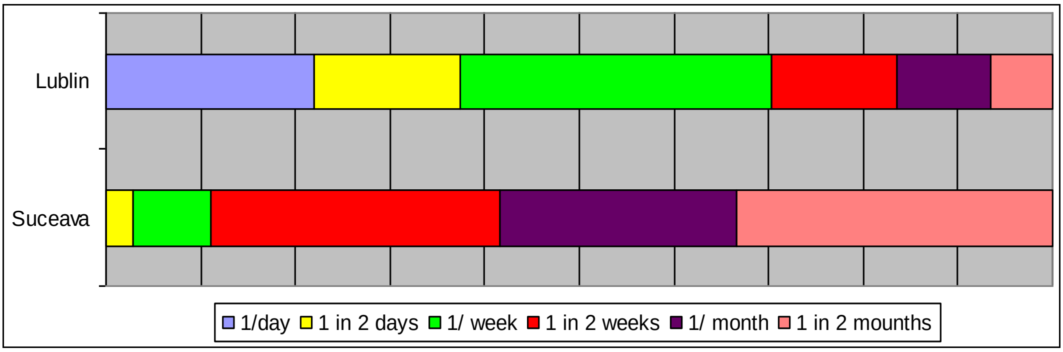


**Figure 2**. The minimum presence of Ukrainian shopper in the shops from Lublin and Suceava
(Source: Authors own research)

In the next step, the respondents were asked to categorize the impact of Ukrainian shoppers on the retail market from Lublin, respectively Suceava (Figure 3). The majority of retailer from Suceava (53 %) classifies the Ukrainian shoppers' impact as very small, compared with only 8% from the Polish retailers, which had the same opinion on Ukrainian shopping tourists. In the opinion of the majority of Polish retailers (37%), the impact of Ukrainian shopper on the retail market from Lublin was very big.

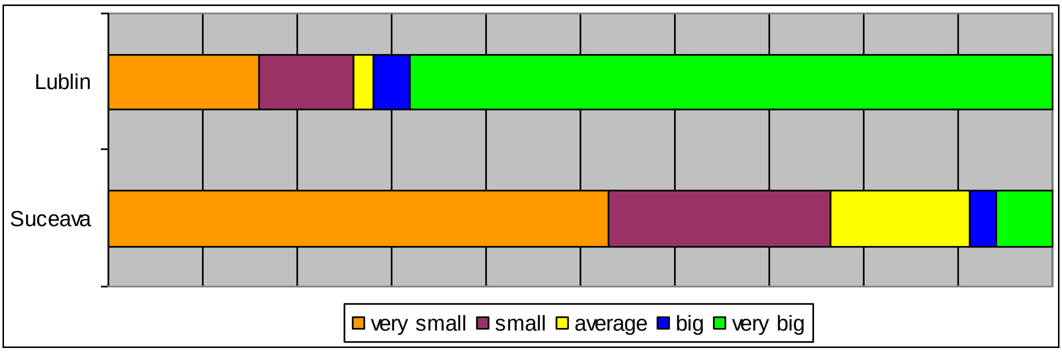


**Figure 3**. The impact of Ukrainian cross border shopper on the retail market from Lublin and Suceava
(Source: Authors own research)

A determinant factor for these responses it is probably cause by the smaller presence of the Ukrainian shopper in Suceava than in Lublin and by the lower level of spending of Ukrainian shopper in Suceava, than in Lublin (Figure 4).

Asked about the Ukrainian shoppers' level of spending in comparison with local customers, the majority of retailers both in Lublin and in Suceava declared that it is the same. However, the next option they choose was different. While in Poland, 39% of retailers declared that Ukrainian shoppers spend more money than local customers in Romania only 21% of retailers customers declared that Ukrainians spend less.

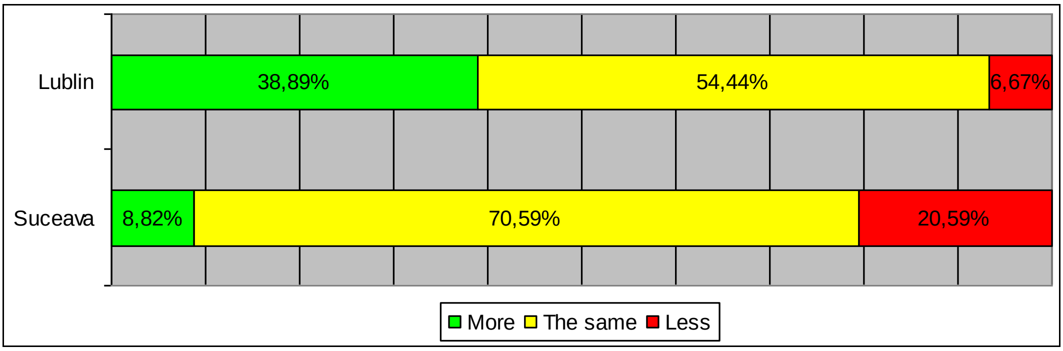


**Figure 4**. The spending of Ukrainian cross-border shopper in comparison with local customers
(Source: Authors own research)

A natural consequence of the small presence of Ukrainian cross-border shopper in Romania than in Poland, followed by the smaller expenditures of Ukrainian shoppers in Romania than in Poland, it is the Romanian retailers' smaller interest in Ukrainian shoppers than that of the Polish retailers (Figure 5). The survey revels that the majority of retailers from Lublin (51%) have a big or very big interest in Ukrainian cross-border shoppers, understanding the benefits they can provide for their businesses. In Suceava, only 34% from the questioned retailers declared such an enthusiastic interest for Ukrainian cross-borders shoppers, with the biggest number of retailers 26% declaring a small interest for Ukrainian shoppers.

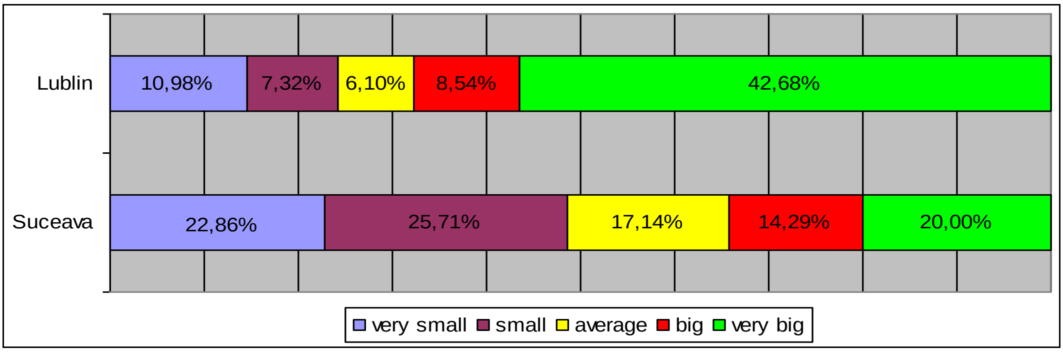


**Figure 5**. Polish and Romanian retailers' interest in Ukrainian cross-border shoppers
(Source: Authors own research)

## CONCLUSIONS

The cross-border shopping activities at the Ukrainian borders with both Poland and Romania have a strong background of a trade and smuggling activities. The economical conditions from Ukraine determined many inhabitants living in the border regions to start a trade business across the border in order to provide an additional source of income. This business, very profitable in the 90s, later slowly started to lose from intensity as the price equality on both sides of the border installed. This trend was also helped by the new retail structures, which raised retail standards pushing market demands at a level that small trades could not offer. The border-cross shopping took a more personal character, rather than commercial one, with shopper orientating more for products unavailable at home.

Both Poland and Romania were affected by these changes, however not in the same way. The presence of Ukrainian shopper in Poland diminished in accordance to the trend, but kept at a noticeable level. This presence, doubled by the higher amount of money Ukrainians were ready to spend in comparison to local customers maintained an active interest from the site of Polish retailer. On the Romanian side, the Ukrainian cross-border shoppers are more associated with a past memory, when merchandise and prices were for them attractive. Currently the situation turned around, with Ukrainian travels arriving in Romania to sell items, rather than buying. The majority of retailers notice the Ukrainians presence, but do not explore it, do I their opinion to sufficient resources, mainly price related. Few retailers are using the opportunity that not all the Ukrainian market has a better and cheaper alternative to Romanian market, some sectors like furniture fully benefiting from Ukrainian shoppers. An important factor here is also the VAT return service, which not all the shops offer, but the one that do, are definitely more visited by Ukrainian shoppers than the ones that do not.

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# THE CORPORATIONS AND THE CHALLENGES OF THE POLITICAL RISKS

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*'Four some has an enviable truths which cannot be spoken,*
*for the one who speaks first has more to lose politically'.*

**Abstract:** The present paper is aimed to address political risks from the perspective of the conceptual distinction between the two levels at which they manifest themselves (micro- and macro risk). The political risk is the risk affecting corporations and can generate significant negative consequences over the operations and economic activities within a country, as well as its stakeholders. Studies show that all corporations value at present the potential political risks for their subsidiaries and that the management of such risks has become one of the most important functions of them. The aim of this work is to describe and explain the political risks to which corporations are subject to (with examples from the oil sector) which are operating in a global business environment and present the main ideas related to management of these risks (practices used in the identification and their measurement).

**Key words:** globalization, corporations, political risk

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## THE POLITICAL RISK - CONCEPTUAL FRAMEWORK

If we look back at on the time horizon of the last decades, we may disclose an evolution in the assessment of risk and uncertainty (Hurduzeu et. al, 2014) and, at the same time, the expression of several main trends in the projection of their stages: (i) the increase in at an unprecedented pace of the situations of risk and uncertainty; (ii) the use of more intensive scientific resources in the processes of the study of the risk and uncertainty of the social economic system; and (iii) the magnification and diversification of the consequences the applications and the risk analysis techniques and uncertainty have generated in the social environment, in nature, at the level of each economic agent, etc. (Strange, 2002). The rise of the international economic transactions, even more present in the context of globalization, subject to multi-national corporations (and the foreign investors in general) of various hazards, which may require the accelerated development solutions increasingly complex in its management. One of the dimensions of such developments is the *political risk*. It refers to those events and processes from the political environment which affect corporate performance.

*The political risk* expressed its existence since Ancient time, both in ancient Greece and the Roman Empire by robbing assets and expropriating the foreign investors. It acquired a status after the Second World War, when the flow of foreign investments from North America and Western Europe towards developing states has intensified. In particular, the interest for this type of risk widened with the nationalization of the foreign assets of the Suez Channel (1956), in Cuba (1959), as well as land owned by the Fruit Company from the United States in Guatemala in 1951. It has evolved and acquired various forms through the centuries by acuiring the today's complex typology.

Green (1974) defines the political risk as likelihood stopping the activity of a multinational company because of some political events, be it spent within the country in which the company operates, either at the international level. In the host countries, the political risk is determined not only by the uncertainty of the governmental actions and the political institutions, but also the influences of the minority groups, such as the lobby groups.

Alon şi Herbert (2007) define this risk as "a neutral phenomenon to which probabilities are associated so that the effects may be positive or negative for the participants". The political risks may take various forms such as: (i) the risk arising from investments which paralyze the economic activity of the receiver or of the participant of this direct investment; (ii) the risk resulting from the imposition of the moratorium on repayment of foreign debt and it occurs in the countries with large external debts which are obliged to resort to postpone their reimbursement and the payment of interest on long and uncertain terms and to this purpose we sign a governmental moratorium; and (iii) risks arising from the customs tariff policy consists in the establishment of discriminatory customs duties on imports from countries which do not benefit from the nation clause of the most-favored regions; (iv) the risk posed by its non-preferential system occurs in connection with the production of developing countries which as a result of the obsolete technology, lack of qualified staff, undiversification, resulting in substantial costs of manufacture; (v) the risk from dumping. It is considered dumping, the situation in which a product is exported at a lower price than that on the domestic market of the exporting country or, in the absence of such a price at a price lower than the highest price charged for export from a third country times lower than the cost of production in the country of origin; (vi) the risk determined by non-tariff restrictions (qualitative restrictions), quantitative restrictions, restrictions to prices etc; (vii) the risk arising from different natural disasters.

Initially, the corporations viewed the political risks in simplistic way, as a simple negative relationship between the governmental measures and the entrepreneurial activity. But the political processes, in their turn, are influenced by various factors specific to the environmental analysis of the country. These factors can be divided into two categories: *domestic factors* and *external factors*. The latter have their origin outside the country and may include host interstate conflicts or, on the contrary, the efforts of cooperation between the countries. In contrast, the domestic factors are in the host country and include governmental favors, religious or social conflicts between different factions of the same nationality, change in the law (Alon și Herbert, 2009).

The economic sectors in the field of the natural resources have high degree of vulnerability. The political risk characteristic to the petroleum sector tends to be significantly higher, and in particular if the states are emerging, characterized by a higher level of instability (Witold and Bennet, 2003). The natural resources may cause an appreciation of the national currency and, as a result, deindustrialization, the tendency to move towards an authoritarian regime and increasing social instability, which can lead to - over time - civil conflicts. Thus, the oil industry, in particular, is frequently in distress by increasing of the nationalist feeling and the conviction that the natural resources available to a country should be used for the good of that nation and not for the profit of the investing companies. At present, many countries are characterized by a significant political instability (e.g. Algeria, Libya, Iran, Iraq, Afghanistan, Angola, Sudan, Lebanon, Nigeria, the Russian Federation s.a) and represent considerable sources of risk for the multinational companies.

**Box 1**. Examples of political risk in oil sector:

a. Peru, took over the management of one subsidiary of Exxon Mobil in 1968.
b. In Peru, in 1985, the police armed with guns took the control over the headquarters of Belco Petroleum in Lima in the property of the United States. This was followed by the nationalization of the company, taking control over its property and its freezing of the bank accounts. The Peruvian president at that time - Alan Garcia - claimed that Belco Petroleum declined to accept new conditions for the application of a reinvestment its own profits in exploration and production.
c. The Lebanon, which expropriated the Western companies from the oil industry in 1969.
d. Angola, when 1986 a group conservatory with political activity in the United States organized a offensive to force Chevron and Gulf Oil to leave Angola. Posters and package leaflets were distributed at ythe gas stations with titles such as: ʼWanted for the delivery of annual aid to Soviet enemy of America in Angola occupied by Cubans who in an amount of 2 trillion $" together with a photo of the president of Chevron. Their purpose was to impeach the government.
e. Bolivia, where president Evo Morales decided the nationalization of the oil sector and of the natural gas. Companies like Petrobas (Brazil) or Repsol (Spain) have invested over time approximately $3.5 billion in development of such branches in Bolivia. The head of state's actions were also extended to the area of more frequent energy checks and more detailed on the foreign companies active in this market and forcing them to renegotiate their profit sharing in the favor of the government.
f. Nigeria, Shell operations in this country. In Nigeria the militants often kidnap the representatives of the multinational, requiring large sums of money or forced the company to offer jobs. 10% of the national production is lost in favor of law breakers, but the low costs of exploitation, still mentain the company in the African territory - with obvious cosst. And the experience of Shell and other corporations are not singular, it illustrates the extent of the risks the oil companies are faced with in their international operations.

## THE DIMENSIONS OF THE POLITICAL RISK: MICRO VERSUS MACRO RISK

The first researcher who referred to the need for this division is Robock, in 1971, but was later taken over in a variety of scientific works.

Simon (1982), Schmidt (1986), Kennedy (1988) and Brewer (1994), adapt this classification to different models of risk assessment and integrate it later in different management strategies.

Kobrin (1979) classified in his turn, the contemporary political risk in the two dimensions.The first dimension makes the distinction between *a country's specific risk,* or macro, affecting all foreign companies in a country, without taking into account what they do, and *the specific risk with the firm,* or micro, which is typical of a branch in the industry, a company or a project. The specific risk with the country is the most worrying for the international bankers, which often grant loans with very high interest to certain countries due to their perception of the risk of that country. The company specific risk concerns most multinational companies. The second dimension of Kobrin makes the distinction between those political events affecting the ownership of goods, such as those involving expropriation, and those which affect a firm operations and, in so doing, revenue and cash-flows. Kobrin claims that the most contemporary political risk for the multinational corporations is the specific risk affecting the company's operations rather than its property. As a result, the political risk often leads to disruptions in major's business operations. Most of the times the changes imposed by policy suppose limitations, such as restrictions on the free fixing of prices, the use of experiences labor force, or changes in the local regulations of the property.

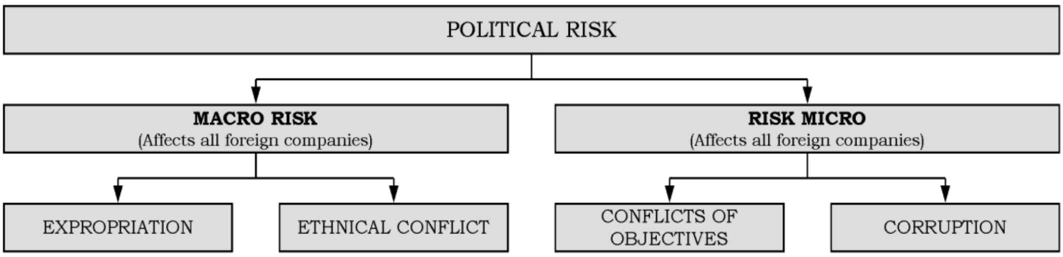


**Figure 1**. Classification of the political risk micro-macro

According to Alon and Herbert, the difference between these two dimensions is that the micro politic risk affects only "certain industries, companies or projects", while the macro has negative consequences on all the firms in a given country. Furthermore, as Martin and Alon state**,** both the micro politic risk, as well as at macro politic would be neutral. When we analyze the political risk from a macro perspective, we will take into account the main characteristics of the host country. We will refer to factors more general, such as the probability of civil wars. In comparison, a micro approach stresses particularly the analysis of the nationality of the transnationals which enter the market in question, but also the specifics of the project in question in relation to the characteristics of the host country. The political risks faced by successful multinational companies differ not only from country to country, but also within the same country. To importance of making such distinctions was justified by Gurumoorthy (2006), who shows that the high incidence is common to the micro politic risk, in contrast to exproprietions carried out on a large scale, whose number is declining. Although the differences are obvious, we can assert an area of intersection of the two dimensions. Thus, both are determined by economic, social and governmental factors. The difference is that the micro approach reveals few special features of the company, designed to reduce or, on the contrary, to emphasize the exposure to risk. Therefore, the micro size has the advantage of a sound financial management. However,we should note that it is necessary to analyze both aspects, as they do not exclude each other and that the micro politic risk, though more specific, does not eliminate the importance of assessment at the macro level. The relationship between these two dimensions is, therefore, one of complementarity. If a company knows its micro politic profile, it will be able to adjust better to host country's characteristics, therefore the macro politic risk. More, both risks affect both successful multinational companies with a view to entering on a market, as well as those already working on that market. Examples of events which are included within the scope of the macro politic risk are represented by the fall of governments by the profound change in the way the economic system (switching from one ideology to another), and it is difficult to estimate with probabilistic calculus. Certain companies are more vulnerable according to this dimension, in particular successful multinational companies which operate in industries considered to be strategic (such as that of energy), because they are subject usually to increased governmental pressure. Between the factors influencing the size of micro political risk we must mention, primary the economic ones. For example, the conditions of employment in certain industries may be more or less favourable, and the governments can invoke the argument incipient industries to protect certain firms. Then, it should not be overlooked the social impact of the factors, which include cultural differences between the host country and the multinational (distance from power or uncertainty avoidance). The governmental factors are significant if we look through the point of view of a high degree of nationalism (take the example Bolivia, where the fields of exploitation of natural gas have been taken over by the government as a nationalisation of reserves of energy foreign owned) or the level of corruption. Between the external factors we note: the economic dependence on other country, the economic policies of the host country in a specific field, the deficit of trade balance, the risk is assessed, first of all because a state's policy has a direct impact on the national economy.

## THE MANAGEMENT OF THE POLITICAL RISK

The studies on the political risk management have taken into account a variety of data from different countries and industries addressed both the specific characteristics of the host country as well as the individual attribute of the investment project.

The term 'political risk management' appeared for the first time in 1950 when the companies have integrated stand-alone departments. In the next decade (years 60) the interest given to those departments has increased substantially, so that Canadian company Massez-Ferguson was the first company which has recognized and implemented the concept of risk management. During this period a high emphasis was placed on the insurance mechanism as the main method of risk management. In the 1970s the insurance companies were no longer been able to cope, to more and more numerous claims and the financial capacity required by the market. The causes of these changes on the insurance market are to be found in the inflationary pressures, but also a significant increase in the value of assets secured especially in the case aviation fleets and technological developments. As a result, companies have started to take more and more risks, becoming aware that they had to take other measures to protect their assets in addition to the insurance policies (Sera, 1995). More and more companies have started to use alternative methods to protect against the risks, as well as loss prevention and control and the implementation of risk management.

In general the evaluations of the political risk take, as a rule, the form of a numeric score, or a letter on a gradual scale, granted to a country as a whole, together with its support in theory and methods for the determination of them. Companies are influenced largely by these assessments, although they have especially a character of recommendation. On the basis of the classification of the country, the corporations may decide to avoid certain countries, but, most often, the negotiations are continued, whereas the existence risk involves paradoxically and the existence of opportunities: it can be so, that other companies have abandoned the location of an investment; in addition, the company may take measures to protect itself against the risk in question, or simply can look at the risk concerned as a challenge. As a matter of fact, a high risk involves also high posibilities of gain.

Coplin and O'Leary have worked up a model on the basis of a prediction and against a complex Delphi technique specially adapted for the political risk. The procedure initiated by the two specialists, called initially 'World Political Risk Forecasts" (WPRF), provide forecasts over a period of 18 months and a 5-year period in respect of most likely political risks, the risk of transfer (currency convertibility), investment risk (restrictions on participation in the share capital) and the risk of export (the risk faced by exporters).

Rummel and Heenan proposed a method of converting the political uncertainty in probabilities, using the term 'risk' as 'mechanism for objective assessment of investment climate'. Haner developed the BERI (Business Environment Risk Information) index as a guide for quantitative classfications based on other rankings, and Coplin and O'Leary initiated in 1979, what was to become the rating system PRS (Political Risk Services). These methods have been used extensively beginning in the 80s by corporations.

BERI uses an indicator based on scores assigned by experts to a number of 10 political variables. The 10 variables are classified in three categories: domestic causes of political risk; external causes to the political risk; symptoms of the political risk. Initially, each of the 10 BERI variables may receive a number of up to 7 percentage points of the analyst expert. The maximum number of points (7) shall be considered to be equivalent to an optimum of the circumstances, a situation in which the risk is minimal. But it can be added the bonuses, so that BERI is created on the basis of a 100 basis points. The guide for the classification of the level of the political risk is the following: (a) 70 – 100 points the environment is stable characteristic to industrialized regions of the world, low-risk; and (b) 55-69 points = moderate risk, certain complications which could influence operations in the short term being possible; (c) 40-54 points = high risk for business; (d) 0-39 points conditions of risk for carrying out businesses unacceptable.

Based on individual scores for the variables of the model, to which we add any bonuses, it is obtobtain the BERI index. The method provides different rankings for 'Present conditions', 'Conditions likely to happen in the following next 5 years' and 'Conditions likely to happen over 10 years'.

In 1986, 'The Economist' published an analysis of the political risk entitled 'Countries in difficulty'. Its authors explained on three pages the methods used and presented a table summarizing the results. Although this method was not described as a whole, and the theoretical foundations weren't even mentioned, it nevertheless presentd the advantage of clarity and simplicity, which was later taken over by businesspeople. In short, the analysis presented a list of factors of an economic, social and political nature, provided a diagram for quantifying the impact of the role of an individual and their relative role and gave out a method for combining scores of risk and their classification by investors. The study aimed only the losses due to socio-political factors, and it did not take into account the variables of an economic nature.

Henisz and Zelner (2003) show that traditional methods used by the companies to keep under control the risks to which their branches may be subject to, prove to be ineffective, the only solution would be the board's decision to negotiate directly with the government of the countries in which they intend to make investments, or even entry directly in, the political game. As companies have demonstrated, for example, the giant oil Italian Eni, the management of the political risks involves mixing the operational efficiency and the political capital, the art of lobbying and putting a pressure on the local decision forces, which are committed also to handle effectively the analytical techniques and tactics. Frynas and Mellahi (2003) on the basis of the political risk differentiation in micro and macro show that the assessment of the size and the management of the micro- and macro dimensions proves to be very specific and complex. A solution would be to create a model of quality, as the one proposed by Alon and Herbert (2007), which identifies the factors of influence of the micropolitic risk and give them some importance (weighted). Based on this, each business in part will quantify the own risk. The advantage would be that each company will be able to see what are the factors which have the greatest negative impact on its business and to remedy this situation. The disadvantage is given by the fact that the model may have a high degree of subjectivity (for example, in the association of the weights of factors) and, therefore, to the adoption of some poor management solution.

Another way is to try managing the individual influence of each factor. The strategies used must be primarily proactive: for example, providing very good conditions of employment can result in reducing the risk reputational.

Also, conducting market studies before the implantation may reduce the negative impact of cultural differences. Depending on the sector in which they operate multinational, according to Gurumoorthy (2006), several ways of assessment and management can be distinguished. For example, in the financial sector we have encountered models like CAMEL (capital, assets, management, earnings, liquidity - analyzed qualitatively), Zonis (built on three indices: Political Stability Index, Policy Foundations Index and Institutional Strengths Index) or the model made by the Bank of America (constructed on the basis of the ten variables economic and financial with impact on the political climate). Once assessed the risk, the author shows the need to go to the action, the base being the lobby, which may come from both the transnational, as well as from the government of the country. Gurumoorthy argues that this strategy extremely efficient can be applied to both micro and macro level.

Business Environmental Risk Index (BEER), Political System Stability Index (PSSI) and Institutional Investor include economic variables in political risk assessments.

In connection with management and micropolitic risk assessment and that of macro risk can be achieved by developing a model quality. Such a model is the one proposed by Martin and Alon (2000), which, according to the authors, has the following advantages: it proposes a proactive approach, enables comparisons, can be used for risk assessment and management in various countries, allows managers to change the weighting or importance of the variables included. Martin and Alon show that such an instrument of management is necessary in accordance with the conditions in which the methods traditionally used to proactive management have proved to be often ineffective. The new strategies in the management of this risk should take into account three types of factors, categories similar to those in size to the micro management: the governmental factors (wars, revolution, nationalization, regulatory measures, corruption, diplomatic relations, human rights), industry (revolt, demonstrations, terrorism, strikes, violence, crime, certain segments of mass-media) and economic (hyperinflation, poverty, low productivity, fluctuations in the exchange rate and interest rates, public debt, trade balance). Account should be taken of the fact that the importance of these factors varies from country to country. Martin (2000) shows that the macropolitic risk can be managed by means of private company, such as International Group and Citicorp, of public agencies as well as Overseas Private Insurance Corporation and Foreign Credit Insurance Agency or international organizations, such as the World Bank/MIGA. The author considers these strategies to be much more efficient than the traditional methods as well as the call to insurance undertakings or agreements between business and certain governmental members.

In the management of the risk both dimensions may rise the question of who should have to deal with this issue, in such a way that the result is objective. Alon and Herbert (2007) advocates for the assesment of the micropolitic risk by the partners from abroad (in order to avoid interference of some organizational interests), and of the macropolitic risk by staff at the location of the multinational (provided that they do not have dual interests - both in the company, as well as in the establishment of good relations with local elites). Martin and Alon (2000) claim that the macropolitic risk must be managed by a group of experts in the field of host country of the multinational.

In this respect, the political risk analysts at the firm Conoco have implemented a system for the assessment of the political risk. Thus, initially they have drawn up a comparative study on the implications of three different scenarios on business operations abroad. The study included global scenarios, covering a larger number of variables of a political, social and economic environment. But the study was not well received, most managers received it with a lack of interest and wereeven disappointed by it. As a result of this experience, the analysts from Conoco decided that, in order to be successful within the organization, the political risk assessment must be one of the following: (i) the relevance for the work of the top managers or the operational departments; (ii) must be closely linked to the immediate aims of the company, such as specific investment decisions or operational problems; (iii) facing a concrete program for action to improve the scheduling process or to influence course of events. When the analysts from Conoco have carried out a second study of external affairs, they took in seriously their own conclusions and have concentrated on decision makers with a critical influence in the progress of the operations in the field oil, and a series of specific problems such as: risk diversification and taxation. The study also enjoyed a successful feast, this time, far from having a global or purely theoretical character.

Gurumoorthy (2006) provides the example of an effective strategy of micro risk management, carried out by British Petroleum. This has implemented strategies which may serve as a model for risk assessment and management. The model BP although it has not made public the detailed rules for micropolitic risk management, it is possible to use the BP model of risk management through its perspective on operational safety. The representatives of the company said at that time that there are very few states where petroleum transnational was not be able to operate, and most risks were manageable from their point of view. There are three levels of management: ex-ante evaluation, continuous and ex-post. BP has implanted in states with raised macropolitic risk, Algeria or Azerbaijan, but has not developed an internal system of security with specialists from the various areas of the security. The corporate maintains good relations with the local governmental agencies, recruits people from the companies local in security and adapts its strategies depending on the country in which it operates. BP has adapted well to laws and conventions and establishing strong ties with the public order forces of the host states.

The Eni approach, the society of exploitation of oil owned by the state of Italy in Kazakhstan by subsidiarul Agip KOC is an example of how to approach, they favored the suppliers of raw materials, have transferred knowledge of pipelines transports, have developed the local people, have carried out a policy of employment in which at least 60% to be citizens cazahi, have contributed to local interest objectives o from the national library to the houses for the poor winning people's sympathy and bringing both of the government and of the population who feels now that he is part of the success the success of Eni. So this company has developed the relationship with host country so now is not very least exposed to micro/macro political risks.

A prime example is the one for the Austrian oil company OMV which has been forced to desinvest its assets in Sudan in 2004 after pressure put by the human rights activists. In addition, in the year 2011 the company has been affected by events related to Arabic revolution in January and February in the countries of North Africa. The production of oil in Libya has been strongly affected, and was stopped in the first quarter of 2011. The Board has monitored closely the development programs to mitigate the adverse effecst of thepolitical risk (a team of managers has been sent to Tripoli to stabilize the situation) and have improved local security, in such a way that production was restarted in November 2011, at a capacity of 30 % of the before crisis. In Libya, demonstrated its political instability, but OMV has stated that if this situation will remain stable in the long term, the supply of crude oil in Libya would be replaced by another region. In addition OMV got actively involved in the Community by establishing a center for young people affected by revolution: ’Libya Tomorrow’. The instability in Yemen of the political environment and marked negatively the investment of OMV. In the first half of 2011 the work has been stopped and remained still owe to the political turbulence that seem to deteriorate. Damages were both substantive and loss of human lives: a consultant OMV in Yemen was deadly shot in the company premises in Haddah. As regards the activity OMV in Tunisia, this plays an important role in the history company, in January 2011, OMV has purchased Pioneer Natural Resources Tunisia Ltd. At the price of 840 mn $. Riots in Tunisia in 2011 did not affect production of oil of the company.

## CONCLUSIONS

The management of a transnational management must acknowledge that political analysis of the environment is as important as the economic analysis of of the host state. As regards the political risk management, the company must adapt to changes in the political environment and implicitly of the business. But regardless of the method of analysis and evaluation used, the political risk will not be able to be eliminated entirely from the international affairs of corporations, as it remains always a certain level of uncertainty. The degree of uncertainty is given by those risks that cannot be identified by the company at the time, while the level of the risk is given by the risks identified. The more, in an economic environment, the risk percentage is non-identifiable, the more the purpose of actions implemented is uncertain. Even if the company can find out most of the risks involved in its operations, the uncertainty cannot be eliminated. As a result, in the current context of globalization we are now witnessing, it is necessary and it is absolutely necessary to implement performance systems of risk management within the multinational companies that want to be efficient and competitive.

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# REGIONAL DISPARITIES AND THEIR MITIGATION IN SLOVAKIA: SELECTED FEATURES AND APPROACHES

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**Abstract:** The presented paper pays attention to the regional disparities, which are one the current issues faced not only by geographically large but also smaller countries. Even though our study discusses regional disparities only in Slovakia, its main goal is to provide some general conclusions and recommendations, which could initiate a potential international discussion in terms of exchange of good practices solving the presented issue. The first part of paper deals with basic terminology and justifies the meaning of the examination of regional disparities. In the second part, based on selected indicators, we identify the rate of regional disparities in Slovakia and we examine the trends in the development of the rate of regional disparities during the years 2000-2012. The last part of paper examines the use of regional policy as a tool for mitigation of regional disparities in Slovakia.

**Key words:** regional disparities, Slovakia, mitigation of regional disparities, regional policy

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## INTRODUCTION

Regional disparities are quite frequently used term that is understood very differently in scholarly literature and social practice. In recent years, the issue of analysing regional development and regional disparities has become very popular in Slovakia. It is examined by geographers, economists and sociologists, because it is a topic with high degree of social relevance (Matlovič, Matlovičová 2012). A number of theoretical and methodological papers based on empirical studies have been published; however, it seems that the research of regional disparities requires an interdisciplinary approach because existing approaches based on the dominant economic dimensions do not capture the full complexity of the issue.

In studying regional disparities, it is necessary to define two essential words: *region*, which even today is the topic for discussion relating to the definition of its nature and criteria for its geographic definition, typology and its qualitative characteristics, and *disparity,* which is very frequently used term of the last decade and which is used to denote the fact that its concept on the one hand contently narrows and on the other hand semantically diversifies, what makes its semantic interpretation often difficult to understand.

## DEFINITION OF REGION AND REGIONALIZATION

Streimikiene (in Kilijoniene et al. 2010) defines region as a territory which differs by specific natural, demographic, social and economic features that characterize given territory and that are different from other neighbouring territories. The region is defined in various conceptions such as social, territorial, geopolitical, economic, etc., but according to Žítek (2002) the most significant interest in the concept of a region is centred in geography. The term region is the object of regional geography, which is according to Matlovič (2006) currently the best platform for the integration of geography and for the increase of its relevance to practice. Regional geography is profiled as an integrated, cross-disciplinary platform of explaining the processes of structuring space on one side and understanding the essence of identity and individuality of regional units of different taxonomic levels in the context of everyday human experience, on the other side (Matlovič 2006, Michálek 2009).

From the current definitions of the region, we consider the definition by Hudec et al. (2009), as the most eloquent one. They define the region as a complex, territorial, open, and dynamic system with a huge number of elements of different quality and thick linkages. It is richly structured and has a wide range of diverse features, such as: openness; flow character-transforming inputs into outputs; interaction with the surroundings; internal differentiation; hierarchy; and adaptability.

According to Ježek (2008 in Wokoun et al. 2008) regions cannot exist by themselves. They are the result of specific processes such as abstraction, generalization or construction, which is called regionalization. Regionalization is one of the elementary methods of regional geography.

Bašovský, Lauko (1990, p. 42) define it as: "*the process of dividing the territorial units which have a certain character(s) and their separation in the territory which this character(s) do not have.*"

### Nuts classification

In defining the regions in terms of the planning units of regional policy in the EU and its individual member countries, including Slovakia, institutional classification so called NUTS is preferred (Sloboda 2006). The name comes from the French La Nomenclature des Unités Territoriales Statistiques. At the beginning of 1970's, Eurostat launched the process of creating the NUTS classification in each member state based on bilateral agreements. The main reasons for creating such classifications were on one hand constantly enlarging of the European Union and on the other hand the growing demand for statistical data according to a uniform methodology. For these reasons, the complete unification of the classification of territorial structures for statistical purposes was created.

According to Eurostat, NUTS classification was created for:

1. Collection, development and harmonization of regional statistics in the European Union,
2. Socioeconomic analysis of the regions,
3. Definition of regional policy in EU member states.

**Table 1**. NUTS classification in Slovakia
(Source: Statistical Office of the SR)

| NUTS 1 | NUTS 2 | NUTS 3 | LAU 1 | LAU 2 | Number of Population NUTS 2 (31.12.2012) | Number of Population NUTS 3 (31.12.2012) |
|---|---|---|---|---|---|---|
| Slovak Republic | Bratislava Region | Bratislava Region | 8 | 73 | 612,000 | 612,000 |
| | Western Slovakia | Trnava Region | 7 | 251 | 1,838,136 | 556,577 |
| | | Trenčín Region | 9 | 276 | | 593,159 |
| | | Nitra Region | 7 | 354 | | 688,400 |
| | Central Slovakia | Žilina Region | 11 | 315 | 1,348,611 | 690,121 |
| | | Banská Bystrica Region | 13 | 516 | | 658,490 |
| | Eastern Slovakia | Prešov Region | 13 | 665 | 1,611,407 | 817,382 |
| | | Košice Region | 11 | 440 | | 794,025 |
| **TOTAL** | **4** | **8** | **79** | **2890** | **5,410,154** | **5,410,154** |

**WHAT IS DISPARITY AND WHY IS IT IMPORTANT TO STUDY REGIONAL DISPARITIES?**

The origin of the word dates from the 16th century of French disparié, based on the Latin origin disparitas which means split (Oxford dictionary). The Cambridge dictionary defines the word disparity as a lack of equality (Cambridge dictionary). Slovak dictionary of foreign words defines disparity as diversity and inequality (Slovník cudzích slov). What kind of inequality is it?

According to Hučka, Kutscherauer, Tománek (2008) it is inequality arising as a result of the basic trends of development, which is a considerable degree of its variability, resulting in uneven development. Consequently, they define the regional disparity as *"diversity, respectively inequality of characters, events, or processes, which have an explicit territorial location (they can be allocated in a defined territorial structure) and which identification and comparison has any rational sense (cognitive, psychological, social, economic, political)"* (2008, p. 5).

Examination of regional disparities is currently based on two basic approaches. The first one is based on the Neoclassical and Neoliberal (convergent) theoretical basic basis, which emphasizes the natural counterbalancing tendencies in the development of the region in the long term. Disparities between regions are understood as natural, given by different conditions and regional specificities of different origins. The emphasis is rather on the positive sides that regional disparities bring. Efficient allocation of resources is provided by market mechanisms and artificial state interventions into this mechanism are unacceptable, (excluding reinsurance of the legal framework for the market operation, maintaining the order and law enforcement, the freedom of information and the repression of cartels). The second approach is based on Keynesian and Marxist (divergent) theories, according to which the main reason of regional disparities is the spontaneous nature of capitalism, which causes a social injustice and related social instability, concentrated in troubled regions. Without the intervention of the state, the trend towards deepening disparities would prevail, which would then exist a long time or permanently (Blažek, Uhlíř 2011). Based on divergent theories, regional policy was created.

In Slovakia, the phenomenon of regional disparities is linked to the regional impacts of post-communist economic transformation after 1989. In the initial period of transformation, the dominance of neoliberal economic approaches prevailed and there was a general reluctance to planning and regional policy (Hampl, Müller 2011 in Matlovič, Matlovičová 2011). Investigative attitude towards regional disparities had been changed only gradually, and was conditioned by the group of impulses. According to Hampl, Müller (2011), and Sloboda (2006) it can be stated that the interest for regional disparities have increased in relation to the constitution and a growing role of regional governments and also the European integration, namely the accession of Slovakia into the European Union in 2004, which applies regional policy inspired by the group of divergent theories the objective of which is to mitigate regional disparities.

**Methodological problems of the analysis of regional disparities**

From the methodological point of view, in studying regional disparities, we have to take into consideration two issues. The first one is the use of proper territorial units and the second one the use of proper indicators.

In connection with the use of proper territorial classification, it can be stated that the definition of regions used in the EU for the statistical purposes (NUTS 2, NUTS 3) is often inappropriate. The regions are often markedly heterogeneous what is reducing their comparability. In many cases, regions are not internally integrated or their boundaries artificially divide natural units. They often have very different size parameters (number of inhabitants, size) what again complicates their comparability. Very well-known problem is the "effect of the capital city", which is demonstrated by statistical overestimation of observed indicators in the region of the capital city. It results from the fact that the capital cities benefit from metropolisation and significant concentration of capital, economic activities using agglomeration effects, saves from the extent a size of the market. In metropolitan areas, companies with a nationwide sphere of action reside which are obtaining the results in several regions, but statistically they obtain the results in the region of the capital city (Sloboda 2006). Another problem is that the capital cities usually belong to the most important centres of commuting, what makes the application of the indicator of regional GDP per capita problematic. On the other hand, the advantage of artificial statistical regions is good data availability (Matlovič, Matlovičová 2011).

We come to the problem of choosing the proper indicators of regional disparities. In general, we face the problem of limited database, available in comparable time lines for territorial units of different scale denominator level along the local-global/continental continuum. The GDP per capita is the most frequently used indicator. The main problem with the use of GDP per capita arises with the effect of commuting. It means that the creation of a regional GDP involve also people who commute from another region. It is quite known that their incomes tend to be spent in their home regions. Therefore, regional GDP per capita is statistically overestimated in the target region and statistically underestimated in the region of commuting (Lapišáková 2002 in Matlovič, Matlovičová 2011).

Summarizing the mentioned facts, it can be stated that in the analysis of regional disparities, it is appropriate to take into consideration a number of relevant indicators which we will explain in the next part of the paper.

**METHODOLOGY**

In order to assess the rate of regional disparities in Slovakia, we were analysing several indicators of socioeconomic nature while each of them was given equal weight. We applied a multi-criteria evaluation of the NUTS 3 regions (8 units), which we consider to be more objective than evaluation on the basis of only one indicator (regional GDP per capita in case of EU). We share the idea that the use of several indicators has a potential to point at problematic regions and to reduce some of the above mention problematic features of the regional GDP. Accordingly, except of the regional GDP, also the following indicators were selected and analysed:

- Unemployment rate
- Average monthly wage
- Net disposable income per capita
- Net cash monthly costs per capita
- Incomes of the health insurance companies from the insurance payments per capita
- Foreign direct investments,
- Profit-oriented organisations
- Enterprises with 250 or more employees per 1000 inhabitants
- Tradesmen per 1000 inhabitants,
- Dwellings completed per 1000 inhabitants,
- Gross fixed capital per capita,
- Expenditures on research and development.

Consequently, the Gini coefficient and coefficient of variation were used as statistical tools for measuring of regional disparities. Gini coefficient, as a measure of statistical dispersion, was used in assessing the overall development of the regional disparities in terms of individual indicators during the years 2000 - 2012. The value of this coefficient was calculated according to the formula:

$$Gini = \frac{1}{2n^2\overline{y}}\sum_{i=1}^{n}\sum_{j=1}^{n}|yi - yj|$$

Coefficient of variation, a measure of variability of the data, was used in examining the differences in the rate of increase or decrease of the regional disparities from 2000 to 2012. The higher value of coefficient of variation means that the data has high variability and less stability.

In the further part of the paper, we examine whether implemented regional policy after the adoption of this resolution aimed towards the declared gradual weakening of divergence and thus to reverse the trends of increase of regional disparities in Slovakia. The subject of our evaluation will be two examples of financial aid in accordance with the principle of complementarity (the principle of complemantarity is based on the principle that funds of the state are not the major, but only additional source contributing to the support of activities emerging in the region):

- The state financial aid in the example of regional aid (so-called investment stimuli),
- The financial aid from EU structural funds.

In the analysis, we observe percentage share of financial aid raised in the region of the total amount of allocated financial aid and also the amount of funding per capita.

**ANALYSIS OF SELECTED INDICATORS**

The GDP per capita characterizes economic prosperity or backwardness of the region due to its productive potential (Regional Statistical Yearbook 2009). The Dynamics of development of the GDP in individual regions in the recent years shows that there is a reduction in lagging behind the EU average in all regions of the SR. Great improvement was recorded in Bratislava Region, which has the highest regional GDP in Slovakia. A relatively good situation is also in the Trnava Region. Other regions (the Trenčín, Žilina, and Nitra Region) are below the national average, while the Prešov Region and Banská Bystrica Region are the most deprived. However, according to the development of the Gini coefficient (Figure 2), there is a constant increase in regional disparities since 2000 and GDP per capita is significantly differentiated on the regional level (Figure 1). The year 2008 was the only exception, when the mitigation of regional disparities was recorded. Thus, the above facts indicate that despite the overall convergence is taking place, regional disparities in the SR are growing to the detriment of southern and eastern NUTS 3 regions in Slovakia.

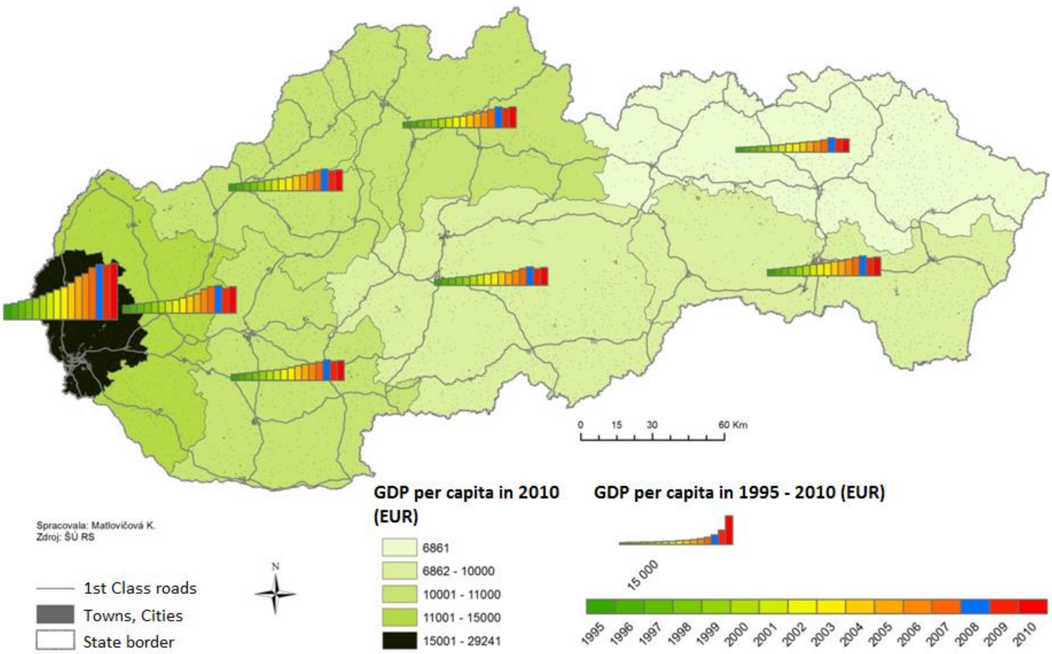


**Figure 1.** Regional GDP in Slovakia during the years 1997-2010

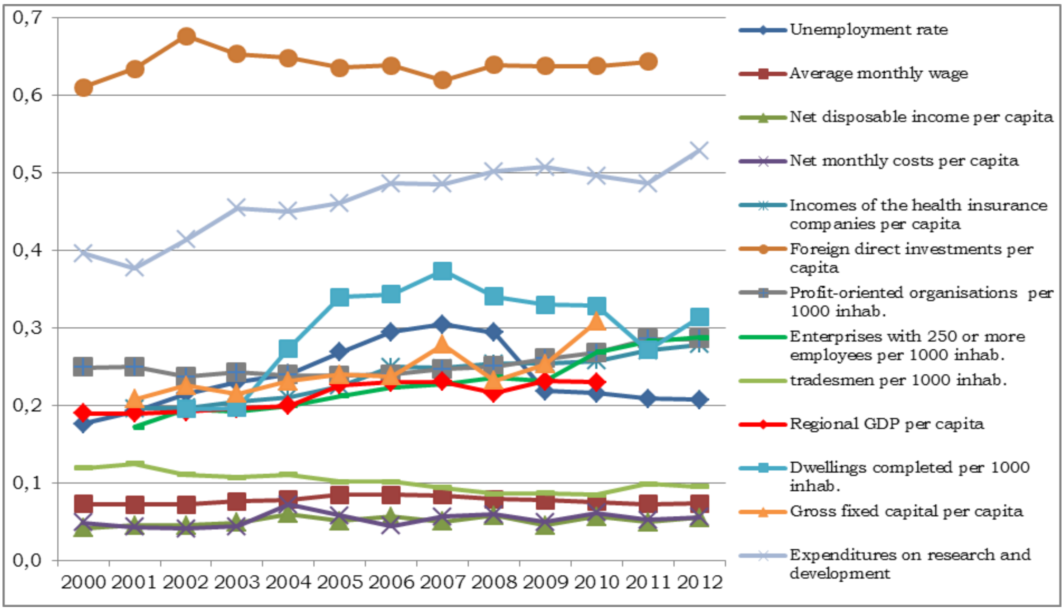


**Figure 2.** Development of the Gini coefficient
in terms of the analysed indicators in 2000-2012

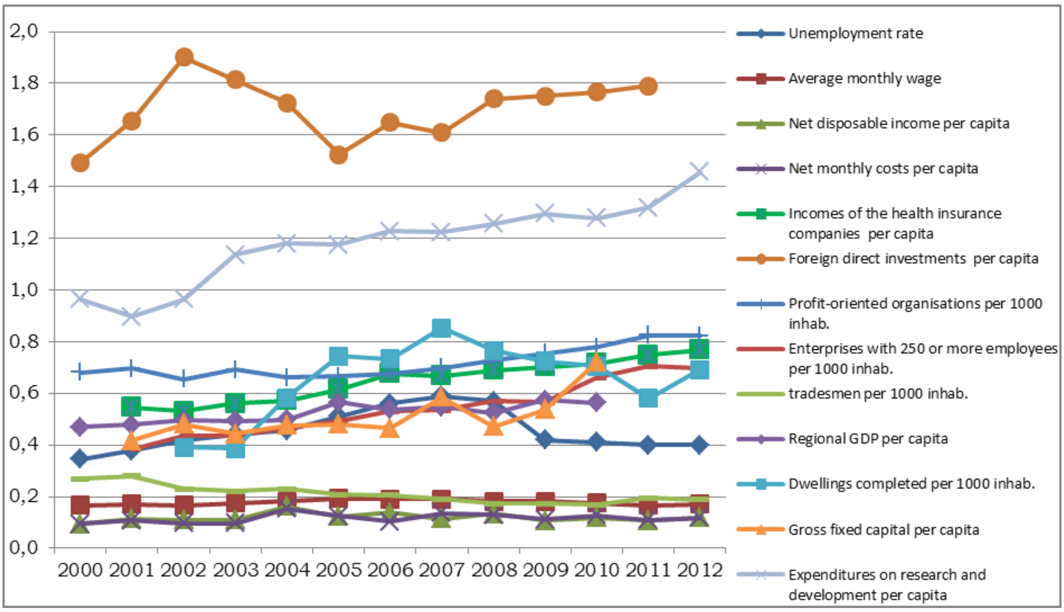


**Figure 3**. Development of the coefficient of variation
in terms of the analysed indicators in 2000-2012

*The unemployment rate* is another indicator, which reflects the socioeconomic development in the regions. It is calculated as a proportion of the disposable registered number of unemployed to the number of economically active population. The cartodiagram on the figure 4 for individual regions shows that the development of the unemployment rate in the SR was constantly decreasing till 2008. However, according to the Gini coefficient (Figure 2) (as well as coefficient of variation), during the same period, the regional disparities in unemployment rates were increasing. Since 2008, the unemployment rate in SR has been growing (this change in development can be attributed to the impacts of the crisis) and at the same time the regional disparities has been mitigated. In other words, we can say that during the period of decline in the unemployment rate, the regional disparities were exacerbated and the rise in the unemployment rate has led to the elimination of regional disparities. Till 2008, the most significant was a gradual deepening of lagging of the Banská Bystrica Region. Since 2009, such a tendency has been more characteristic of the Košice Region, which currently has the highest unemployment rate (19.7 % in 2012). In terms of unemployment rate in 2012, the SR can be divided into 2 sub-regions. The first one is the region of developed north-western Slovakia (Bratislava, Trnava, Trenčín, and Žilina Region), where the unemployment rate is below the national average (14%). The second sub-region includes the marginal NUTS 3 regions of the Southeast Slovakia (i.e. Nitra, Banská Bystrica, Košice, and Prešov Region), where the unemployment rate is above the national average. The unemployment rate points significantly at the uneven regional development in the country and at the deepening of regional disparities. The lagging of the Prešov and Banská Bystrica Region is becoming more significant.

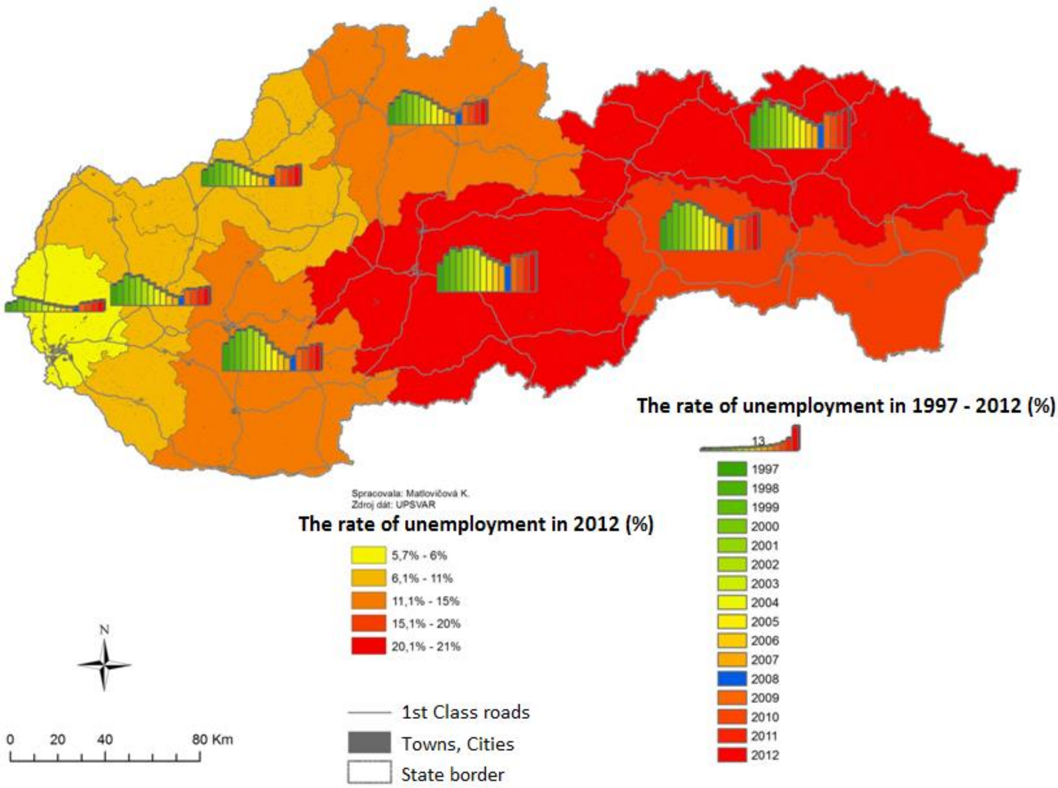


**Figure 4**. Unemployment rate in the regions of the SR in 1997-2012

The value *of average monthly wage also* reflects a differentiated development in the regions. In general, we can state that a more rapid growth of average wages till 2007 was also linked to the increase in regional disparities.

The polarization between the Bratislava Region and the rest of Slovakia was deepened during the years 2000-2007. Since 2008 the increase of average monthly wage has been less significant and the elimination of regional disparities has occurred. However, significant regional disparities still exist. Only the dominant Bratislava Region has its average monthly wage 1029 EUR above the national average (805 EUR). All other regions didn't reach the national average. The second highest average monthly wage was in Trnava Region. The lowest average wage was in the Nitra Region (661 EUR) and Prešov (613 EUR) region. The Prešov Region permanently has had the lowest wage since the beginning of the analysed period.

*Net disposable income* and *net monthly costs per capita* are economic indicators of regional disparities, which provide reliable information about the total incomes and consumption expenditures of inhabitants. They are indirect indicators of the purchasing power, which may be used in the analysis of the business environment. During the analysed period, the development of the both indicators was rather changeable, with increasing and decreasing periods. However, comparing the years 2000 and 2012, in terms of the Gini coefficient (Figure 2), we can observe the increase of regional disparities. The best results, i.e. the highest net income per capita as well as the higher expenditures throughout the analysed period were recorded in the Bratislava Region. On the other hand, the poorest values of indicators were recognized in the Prešov region.

The *incomes of the health insurance companies per capita* represents the payments from the insurance payments of payers under the generally applicable law. It includes the levies paid by employers, workers, self-employed people, self-payers, levies paid for insured people to the state. This indicator thus provides a certain picture of the economic situation of residents and subjects located in the region (Regional Statistical Yearbook 2008). According to this economic indicator, regional disparities were growing during the whole analysed period. The only exception was the year 2007, when the decrease was recorded, as shown by the Gini coefficient (Figure 2). During the analysed period, the best results, i.e. the highest incomes of the health insurance companies per capita, were recorded in the Bratislava Region. On the other hand, the lowest incomes of the health insurance companies per capita were recorded in the Prešov Region. Similarly as in the case of the previous indicator, also this one is strongly influenced by the effect of the capital city, which indicates the distance between Bratislava and all other regions. There are relatively low disparities between the remaining regions.

The amount of foreign direct investments per capita (to the end of the calendar year) reflects the investment attractiveness of regions and their development dynamics. Direct Foreign investments bring a number of effects to the region and act as an impuls for economic development. During the analysed period, the Gini coefficient increased from 0.611 in 2000 to 0.644 in 2011 (Figure 2). Even the increase of regional disparities in foreign direct investments was not significant, they are on the high level oscillating around the value of 0.62. In the last analysed year 2011, the highest share of the total foreign direct investments was made in the Bratislava Region (67.6 %) followed by the Trnava Region with a share of 7%, the Košice Region (6.6 %), the Žilina Region (6.6 %), the Trenčín Region (4.7%), and the Nitra Region (4%). The lowest proportion of the total investments in Slovakia was made in the Banská Bystrica Region (2.5%) and in the Prešov Region (only 0.9%).

In terms of further development of the regions in the SR and efforts to balance regional disparities, it is necessary to pay attention also to the development of the entrepreneurial structure which is characterized by the profit-oriented organizations per 1000 inhabitants, enterprises with 250 or more employees per capita, as well as tradesmen per 1000 inhabitants.

*Profit-oriented organizations* are profit-making organisations registered under the Commercial Code and contributory organizations whose turnovers exceed more than 50% of the reporting cost. The number of profit-oriented organizations in Slovakia rose from 93,072 in 2000 to 164,771 in 2012. As indicated by the Gini coefficient (Figure 2), there exist regional disparities in the above indicator across the regions in the SR. Since 2006 the regional disparities have been exacerbated in terms of given indicator. In 2012 the value of Gini coefficient was 0.285. The highest number of the profit-oriented organizations per 1000 inhabitants is again in the dominant Bratislava Region. In 2012, there were 95.32 profit-oriented organizations per 1000 inhabitants. In all other regions, there were recorded significantly lower numbers oscillating around 20-30 profit-oriented organizations per 1000 inhabitants. The fact that all other regions are below the national average can be reasoned by the generally high concentration of organisations in the capital city.

In terms of enterprises with 250 or more employees per capita, again the increase in regional disparities has occurred during the analysed period. The best results, i.e. the highest number of enterprises with 250 or more employees per capita was recorded in the Bratislava Region, which was followed by the Trenčín Region. Both of these regions occupied the leading positions over other regions during the whole analysed period. A worse situation is in the rest of the regions. Since 2001, the regional disparities were strongly exacerbated. Increase in regional disparities is documented also by the Gini coefficient (Figure 2), which moved from 0.172 in 2001 to 0.287 in 2012 and coefficient of variation (Figure 3) which moved from 0.383 in 2001 to 0.698 in 2012.

The other important indicator of business structure is *tradesmen* and its number *calculated per 1000 inhabitants.* Tradesman is a person who is doing business based on the Trade Act. The number of tradesmen in Slovakia during the period of years 2000-2012 increased from 279,597 to 387,452. The Gini coefficient shows, that there are regional differences in terms of this indicator. However, the positive fact is that from 1999 till 2010, regional disparities were reduced. The Gini coefficient (Figure 2) decreased from 0.119 in 1999 to 0.0847 in 2009. The coefficient of variation (Figure 3) also decreased from 0.264 in 1999 to 0.173 in 2009. The increase appeared again in 2010. The trend of reduction in regional disparities was apparent from the increased number of tradesman per 1000 inhabitants in less developed regions (Prešov, Banská Bystrica, and Košice) and less intensive growth in the developed regions (Bratislava, Žilina). However, during the whole analysed period, the weakest positions have been occupied by the Kosice region, the Banská Bystrica Region and the Prešov Region. On the contrary, the strongest position has been occupied by the dominant Bratislava region, followed by the Žilina Region and the Trnava Region.

The quality and affordable housing is an important factor influencing labour mobility, which is a serious problem in the Slovak economy. According to the analysis, housing conditions are considerably varied within regions of the SR. In terms of *dwellings completed per 1000 inhabitants*, there was a continual deepening of regional disparities until the year 2007. This situation was reflected also by the increasing value of the Gini coefficient (Figure 2), which icreased from 0,196 in 2002 to 0.374 in 2007, and the coefficient of variation (Figure 3) from 0.391 to 0.853. This increase was primarily caused by the fact that in the regions with significant foreign investments (i.e. Bratislava, Trnava, and Žilina) also the construction of flat buildings was of great importance. In 2007, 63% of the total amount of completed dwellings in Slovakia were in above mentioned three regions. On the contrary, Prešov and Košice regions accounted only for 13,3%, although there are the 2nd and 3rd largest cities in Slovakia. At the beginning of the analysed period (in 2002) the above proportion was only 49.2 % and 22.8 %. During the years 2008-2011, there was a period of mitigation of regional disparities in the number of completed dwellings per 1000 inhabitants. In the 2012, the above regional proportion was 56.6 % and 17.3 %, which confirms the new increase of regional disparities in dwellings.

The indicator of *gross fixed capital per capita* reflects the acquisition of long-term assets, which are deducted by the reduced long-term assets by producers - residents during the year. The formation of the gross fixed regional capital is the sum of gross capital, which was formed in the various sectors in the region (Regional Statistical Yearbook, 2009). In terms of this economic indicator of regional disparities, the regional disparities were exacerbated during the analysed period, which is confirmed by both Gini coefficient (Figure 2) and coefficient of variation (Figure 3). The most significant increase occurred in the years 2007 and 2010. In the last analysed year, the value of Gini coefficient was 0.309 and coefficient of variation 0.722. The best results, i.e. the highest production level of the gross fixed capital per capita were recorded in Bratislava Region throughout the whole analysed period. On the contrary, the poorest situation is permanently in the Prešov region.

*Expenditures on the research and development* is another indicator within which the increase in regional disparities was observed during the analysed period. The value of Gini coefficient (Figure 2) changed from 0.396 in 2000 to 0.529 in 2012 and coefficient variation (Figure 3) changed from 0.965 in 2000 to 1.4557 in 2012. The substantial amount of the total expenditures on research and development were directed to the Bratislava region. The all other regions have been significantly below the national average since 2000. In 2012, Bratislava region accounted for 57% of the total expenditures provided for research and development. There were recorded relatively low disparities between the remaining regions.

## REGIONAL POLICY AS A TOOL FOR MITIGATION OF REGIONAL DISPARITIES

Výrostová (2010) defines regional policy as: *"a part of the state policy which represents a set of objectives, tools and activities to improve the spatial organization of economic activities to reduce regional disparities and to ensure economic, social and territorial development of the regions."*

It was based on divergent theories which consider the spontaneous nature of capitalism to be the cause of regional disparities influencing social injustice and related social instability concentrated in undeveloped regions. The beginning of regional policy is associated with the United Kingdom, where during the Great Depression in 1930's, the socioeconomic disparities between regions deepened. EU regional policy began to develop gradually, depending on the different stages of building a common market, from which it was expected that can provide spontaneous mitigation of regional disparities (Žítek, Klimová 2008).

In 1987, the Single European Act entered into force, which is considered one of the most important milestones in the development of regional policy. In this document, a separate section titled "Economic and social cohesion" was devoted to the regional policy. This article declares the effort that the EU will focus on the reduction of regional disparities between the individual regions, which should contribute to the overall strengthening of its economic and social cohesion. To achieve these goals, the EU will benefit funds (ESF, AEGGF ERDF) (Čajka, Rýsová, Pešout 2005).

According to the Government Resolution from 13th September 2000, no. 725/2000, regional policy was defined. It is understood as conceptual and executive action of the state, local government and other subjects which aim is:

- to contribute to the harmonious and balanced development of regions,
- to mitigate disparities between the levels of development of individual regions,
- to promote economic and social development of individual regions, particularly in terms of their activation of underused economic and social potential and to promote the rational use of nature and natural resources, including environmental protection, i.e. to promote sustainable regional development.

**State financial aid**

The state financial aid as a tool of regional policy has started to function since 2002, based on the Law no. 565/2002 collection of laws about the Investment stimuli and in accordance with the map of regional aid for Slovakia. Since 2008, the investment stimuli have been provided under the Law no. 561/2007 collection of laws about the Investment stimuli and on amendments to certain laws. On the basis of this law, the investment assistance and unemployment assistance are used for investment projects, projects of expansion of industrial production, technology centres, centres of strategic services and centres of tourism.

From the analysis of the allocation of financial funds from the State financial aid (investment stimuli), approved by the Slovak government, it results the strong spatial non-uniformity. In the period 2002-2013, the highest proportions of allocated financial funds (table 2) reached the Žilina Region (23.99%), the Trnava Region (23.65%) and the Nitra Region (14.77%). Paradoxically, the least supported regions, which received the lowest proportion of allocated financial funds, were the Banská Bystrica Region (5.85%), the Bratislava Region (4.35%) and the Prešov Region (2.94%). In the case of the Bratislava Region, it is understandable as it is the most economically developed region in Slovakia, but the lower proportion also reached the Banská Bystrica Region and the Prešov Region which belong to the least developed regions in Slovakia. It is paradoxical that even the Bratislava Region has obtained greater support from the state than the least developed Prešov Region. Three most problematic regions (the Prešov, Košice, Banská Bystrica Region) reached a total share of 20.93 % (i.e. less than obtained separately the Žilina and Trnava Region). While one inhabitant of the Trnava Region obtained through the state aid 614.72 EUR, on the other hand, one inhabitant of the Prešov Region obtained only 52.94 EUR. The range of disparities (the ratio between the best and worst region) in the allocation of state aid per capita reached in the period from 2002 to 2013, 1,161.1 % which is eleven times more.

**Table 2**. Received state financial aid (investment stimuli) in the SR according to the NUTS 3 regions in 2002-2013
(Source: Calculated according to the results of the report about the state financial aid of the Ministry of Economy)

| NUTS 3 region | The number of projects | The amount of the government investment stimuli (EUR) | The amount of the government investment stimuli per capita (EUR) | The share of the total government investment stimuli in the NUTS 3 regions (%) | The number of planned working places according to the government investment stimuli | The share of the total number of planned working places in the NUTS 3 regions (%) |
|---|---|---|---|---|---|---|
| **Bratislava Region** | 8 | 62,779,914 | 103.08 | 4.35 | 3,399 | 6.89 |
| **Trnava Region** | 10 | 341,687,737 | 614.72 | 23.65 | 7,502 | 15.21 |
| **Trenčín Region** | 24 | 177,992,231 | 296.77 | 12.32 | 9,834 | 19.94 |
| **Nitra Region** | 23 | 213,406,394 | 302.71 | 14.77 | 7,238 | 14.67 |
| **Žilina Region** | 18 | 346,567,876 | 499.21 | 23.99 | 6,891 | 13.97 |
| **Banská Bystrica Region** | 17 | 84,525,752 | 128.65 | 5.85 | 3,307 | 6.70 |
| **Prešov Region** | 8 | 42,488,951 | 52.94 | 2.94 | 1,145 | 2.32 |
| **Košice Region** | 31 | 175,388,531 | 225.98 | 12.14 | 10,014 | 20.30 |
| **Slovakia** | 139 | 1,444,837,386 | 267.59 | 100.0 | 49,330 | 100,0 |

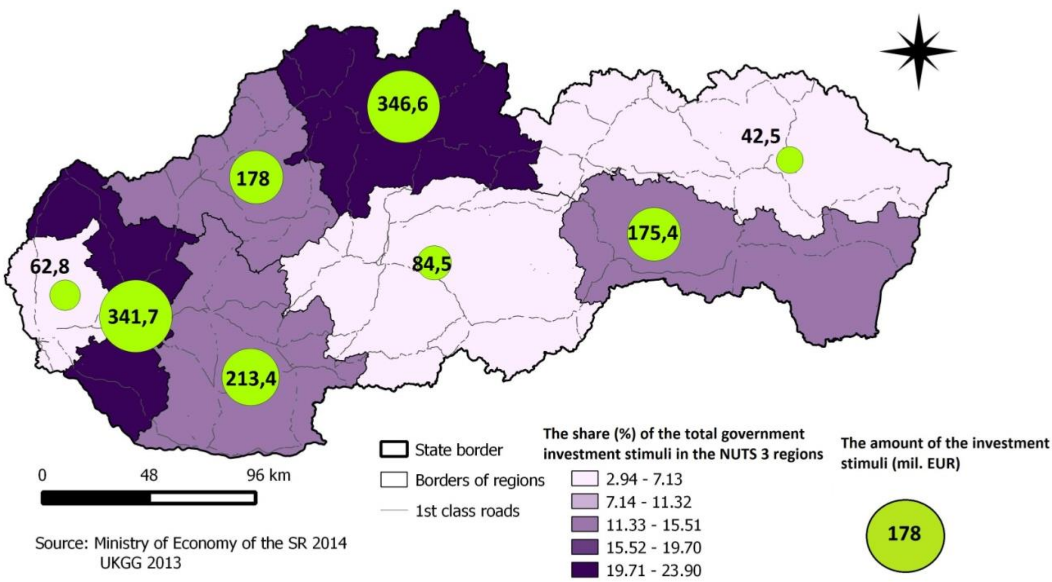


**Figure 5**. The amount of the government investment stimuli (mil. EUR) in the NUTS 3 regions in the SR during the years 2002-2013

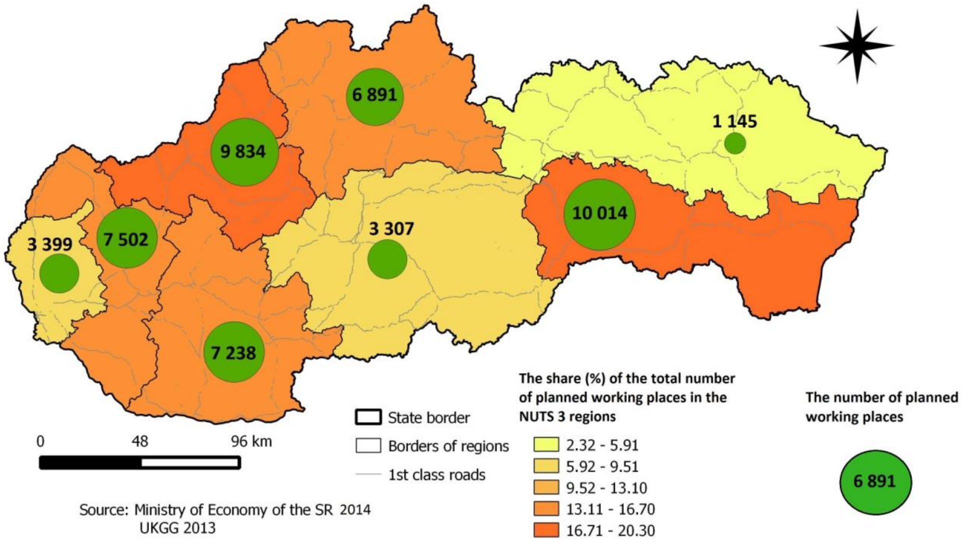


**Figure 6**. The number of planned working places according to the government investment stimuli (mil. EUR) in the NUTS 3 regions in the SR during the years 2002-2013

It is also interesting to examine the official support for the creation of new working places. From the total number of the planned working places (49,330) in the period 2002-2013, 10,014 working places were planned in the Košice Region (20.30%), which is followed by The Trenčín Region (19.94%), the Trnava Region (15.21%) and the Nitra Region (14.67%). The Lowest number of planned working places was planned in the least developed regions the Banská Bystrica Region (6.70%) and the Prešov Region (2.32%). It is paradoxical that in the regard of planned working places, in the most developed Bratislava Region (6.89%) higher number of working places was planned than in the Banská Bystrica and Prešov Region.

**Structural Funds**

After the accession into the European Union in 2004, Slovakia got the opportunity to use the Structural Funds, which represent an instrument of regional policy to promote regional development. Each fund defines its domain. Determination of the amount of the Structural Funds depends on the severity of the regional problems, the financial strength of a Member State, the interest of the Community, as well as on the regional interest in the appropriate activity (Čajka, Rýsová, Pešout 2005). Nowadays, we entered into the fifth programming period of the EU for the years 2014-2020. For each programming period, a particular amount of funds is allocated which has been increasing since the first programming period (1988-1993) as well as with increasing number of new Member States.

The analysis of the allocation of the Structural Funds in the period 2004-2006 (Figure 6) shows a more even allocation of finance to individual regions as it is in the case of state financial aid (Table 3). The highest proportions of the Structural Funds were reached by the Banská Bystrica Region (26.51%), the Prešov Region (16.51%) and the Nitra Region (12.15%). Three least developed regions (Banská Bystrica, Košice and Prešov) obtain 53.9% of the total allocated funds. The highest absorption of the Structural Funds per capita obtained the Banská Bystrica Region (409.23

EUR), the Prešov Region (209.63 EUR) and the Trnava Region (201.92 EUR). The Nitra Region (174.03 EUR) was below the average. Significantly behind the average, there were the Košice Region (143.12 EUR), the Bratislava Region (147.54 EUR) and the Žilina Region (125.61 EUR). The lowest support was received by the Trenčín Region (93.14 EUR). The range of disparities (the ratio between the best and worst region) in the allocation of the Structural Funds per capita reached 439.6% in the programming period 2004-2006.

**Table 3**. Received Structural Funds in the SR according to the NUTS 3 regions in 2004-2006
(Source: Calculated according to ITMS, www.nsrr.sk)

| NUTS 3 region | The number of supported projects | The amount of received Structural Funds (EUR) | The amount of received Structural Funds (EUR) per capita | The share of the total amount of received Structural Funds (%) |
|---|---|---|---|---|
| **Bratislava Region** | 899 | 89,091,187.92 | 147.54 | 8.78 |
| **Trnava Region** | 582 | 111,892,029.89 | 201.92 | 11.03 |
| **Trenčín Region** | 433 | 55,934,473.90 | 93.14 | 5.51 |
| **Nitra Region** | 810 | 123,276,784.24 | 174.03 | 12.15 |
| **Žilina Region** | 584 | 87,266,940.49 | 125.61 | 8.60 |
| **Banská Bystrica Region** | 734 | 268,897,873.84 | 409.23 | 26.51 |
| **Prešov Region** | 781 | 167,410,545.72 | 209.63 | 16.51 |
| **Košice Region** | 744 | 110,469,405.83 | 143.12 | 10.89 |
| **Slovakia** | 5,567 | 1,014,239,241.84 | 188.20 | 100.0 |

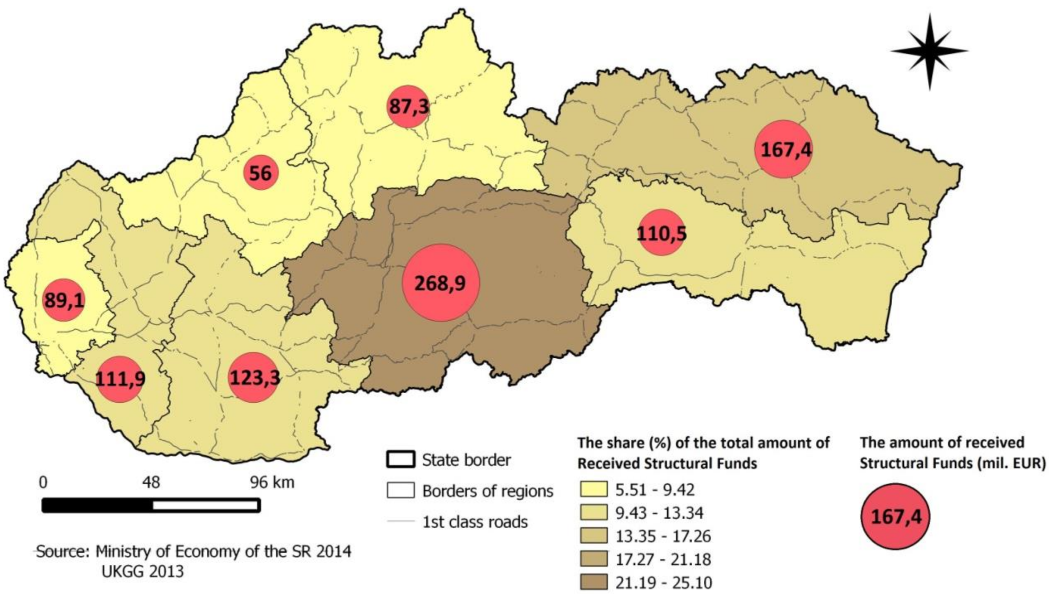


**Figure 7**. Received Structural Funds (mil. EUR) in the SR according to the NUTS 3 regions in 2004-2007

The highest proportions in the Structural Funds during the second programming period (2007-2013) (Table 4, Figure 8) reached the Trenčín Region (19.59%), the Žilina Region (17.10%), the Prešov Region (15.52%), and the Banská Bystrica Region (13.29%). Above the average in spending Structural Funds per capita were the Trenčín Region (1,440.14 EUR), the Žilina Region (1,081.85 EUR), the Banská Bystrica Region (891.14 EUR) and the Prešov Region (842.64 EUR). The Košice Region (677.41 EUR), the Bratislava Region (560.18 EUR) and the Trnava Region (526.94 EUR) were below the average. The lowest support per capita was in the Nitra Region (493.50 EUR). The range of disparities (the ratio between the best and worst region) in the allocation of the Structural Funds per capita reached 291.8 % in the programming period 2007-2013.

**Table 4**. Received Structural Funds in the SR according to the NUTS 3 regions in 2007-2013
(Source: Calculated according to ITMS, www.nsrr.sk)

| NUTS 3 region | The amount of the Contracted Funds (EUR) | The amount of received Structural Funds (EUR) | The share of used Structural Funds of the total Contracted Funds (EUR) | The amount of received Structural Funds (EUR) per capita | The share of the total amount of received Structural Funds (%) |
|---|---|---|---|---|---|
| **Bratislava Region** | 881,001,585.54 | 345,259,765.77 | 39.19 | 560.18 | 7.86 |
| **Trnava Region** | 516,640,389.09 | 294,539,858.79 | 57.01 | 526.94 | 6.70 |
| **Trenčín Region** | 1,452,430,920.29 | 860,499,114.54 | 59.25 | 1,440.14 | 19.59 |
| **Nitra Region** | 572,342,901.68 | 345,577,441.67 | 60.38 | 493.5 | 7.87 |
| **Žilina Region** | 1,194,293,448.99 | 751,443,156.99 | 62.92 | 1,081.85 | 17.10 |
| **Banská Bystrica Region** | 1,151,716,808.33 | 584,054,343.52 | 50.71 | 891.14 | 13.29 |
| **Prešov Region** | 1,170,938,597.96 | 681,908,553.68 | 58.24 | 842.64 | 15.52 |
| **Košice Region** | 869,891,157.11 | 530,042,495.63 | 60.93 | 677.41 | 12.06 |
| **Slovakia** | 7,809,255,808.99 | 4,393,324,730.59 | 56.26 | 811.36 | 100 |

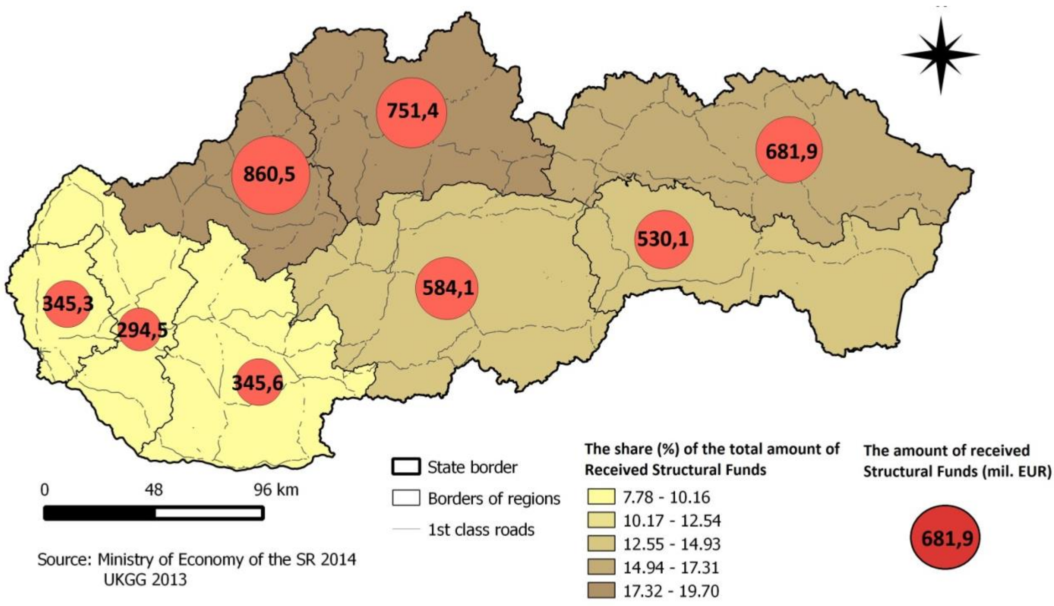


**Figure 8**. Received structural funds (mil. EUR) in the SR according to the NUTS 3 regions in 2007-2013

In this programming period, it is interesting to examine the share of used Structural Funds of the amount of the Contracted Funds. The highest success in obtaining Structural Funds in this programming period reported the Žilina

Region (62.92%) followed by the Košice Region (60.93%) and the Nitra Region (60.38%). The lowest percentage reported the Bratislava Region (39.19%) and the Banská Bystrica Region (50.71%).

The analysis of the allocation of the Structural Funds in the programming period 2004-2006 shows more even allocation of financial aid to individual regions as it is in the state financial aid; however, in comparison of the first programming period with the second programming period the allocation of financial aid is less even. When in the first programming period, the share of the Structural Funds for the least developed regions (Prešov, Banská Bystrica, Košice Region) was 53.91%, in the second programming period, it was only 40.87 %. Is a decrease of more than 13 %.

## CONCLUSIONS

Analysis of the selected indicators of regional disparities in the SR demonstrates a differentiated development in individual regions. As confirmed by the development of the Gini coefficient for individual indicators, socioeconomic development permanently has a strong east-west gradient. A strong economic core is formed in the Bratislava Region and in its neighbouring regions (Trnava, Trenčín, and Žilina Region) and the economic periphery includes the southeast regions of the republic (Prešov, Banská Bystrica, Košice and Nitra Region). In terms of individual regions, the best results were recorded in the Bratislava Region throughout the whole analysed period. On the other hand, Prešov region shows the worst results in the nine out of thirteen analysed indicators. This means that it has the worst positions in the regional structure of Slovakia. What is more, the gap between the economically prosperous regions and the economic periphery is growing also during the past few years which confirm the fact that since 2009 the Gini coefficient has been growing in the case of eight out of thirteen analysed indicators.

The current situation in the peripheral regions is linked to the marginal eccentric location of given regions, a lower accessibility through the major transport infrastructure (especially highways), the concentration of population with a low social status and last but not least, to the incorrect settings of regional policy with the localization of foreign investment in economically advanced regions of Slovakia. Summarizing the evaluation of the regional policy in Slovakia through three financial schemes, it can be stated that the regional policy did not reflect the full priority to soften polarization of Slovakia in the developed west/northwest and the lagging southeast/east. A west - east gradient was reinforced. It is interesting to compare in these three schemes the share of the financial aid which gained two eastern regions (the Košice and Prešov Region) in relation to their share of the number of population. In the case of the state financial aid in 2002-2013, the ratio was 15.08% (29.2%), in the case of the Structural Funds in the programming period 2004-2006, 27.4% (29.2%), and the Structural Funds in the programming period of 2007 -2013, 27.58% (29.2%). This means that eastern Slovakia in any scheme did not receive the level of share of the financial aid above the level of their share in the number of population. Analysed regional policy instruments did not mitigate but rather exacerbated regional disparities in Slovakia. For this reason, effective approaches to mitigation of regional disparities not only in Slovakia, but also in other V4 countries and countries in different parts of the world are the challenging issue for the future.

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# ELECTORAL PRACTICES IN POLITICAL PARTIES IN ROMANIA AFTER THE FALL OF COMMUNISM. CASE STUDY: THE NATIONAL SALVATION FRONT AND THE DEMOCRATIC AGRARIAN PARTY OF ROMANIA

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**Abstract:** In the following notes we are going to examine the way in which two newly created parties from post-communist Romania have gathered, at a declarative level, in their political programmes ways of making the Romanian economy compatible with those of Western countries. We have chosen two parties on purpose – The National Salvation Front and The Democratic Agrarian Party of Romania – regarded by specialists in the Romanian political phenomenon as obviously dating before 1989, in order to analyze the manner in which they understood, at the beginning of the '90, to take steps in providing Romania with a capitalist economic background like the one in the Western countries. Many of the ideologists of such economic ideas from these parties were the same persons as those supporting the idea of a centralized economy before 1989. It is not our intention to discuss here the fit or unfit relationship between the political programmes and the real events. In the first and a half decade of the post-communist era the results were obvious, as long as the two parties- first of all The National Salvation Front, but The Democratic Agrarian Party of Romania too, have led the country.

**Key words:** Post-communist, National Salvation Front, Democratic Agrarian Party of Romania, Political programmes

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The year 1989 marked the implosion of communist regimes from Eastern Europe[1]. These started to fall one after another so quickly that in only a few months they disappeared from the international political background. As a consequence, in all these areas, begins a process of retrieving the lost time and huge differences that separated the European East from the Western part of the continent. The phenomenon takes place in all ex-communist countries. Some of them moved faster and some-slower. Without doubt, Romania is one of the ex-

[1] Ion Alexandrescu, Stan Stoica, *România după 1989. Mică enciclopedie*. Bucureşti: Editura Meronia, 2006, p. 133.

communist countries that moved on in a much more difficult way on its road to modernizing and becoming a European country[2]. From an economic point of view, the process was even more complicated because of communist reminiscences found in Romanian economy for more than a decade after the events from December 1989.

However, all political parties newly created had as their principal goal a faster development of Romanian economy so that it might become compatible to all economies from European countries. In other words, they tried to make it European.

In the following notes we are going to examine the way in which two newly created parties from post-communist Romania have gathered, at a declarative level, in their political programmes ways of making the Romanian economy compatible with those of Western countries. We have chosen two parties on purpose –The National Salvation Front and The Democratic Agrarian Party of Romania – regarded by specialists in the Romanian political phenomenon as obviously dating before 1989, in order to analyze the manner in which they understood, at the beginning of the '90, to take steps in providing Romania with a capitalist economic background like the one in the Western countries. Many of the ideologists of such economic ideas from these parties were the same persons as those supporting the idea of a centralized economy before 1989. It is not our intention to discuss here the fit or unfit relationship between the political programmes and the real events. In the first and a half decade of the post-communist era the results were obvious, as long as the two parties- first of all The National Salvation Front, but The Democratic Agrarian Party of Romania too, have led the country.

A very important aspect to be mentioned is that the political programmes are full of good intentions, even if clumsily put down in words. Almost all of the paragraphs underline the necessity of passing from the socialist economy to the capitalist one and the developing of a higher living standard.

From the beginning, the political ideas of The National Salvation Front were based on the fact that the party was a democratic one and its purpose was to realize in Romania "*a modern and efficient economy*"[3], while the same document of The Democratic Agrarian Party of Romania mentioned as one of its main objectives "*the fight for economic reconstruction*"[4] in the sense of "*modernizing and intensifying the agriculture, forestry, food industry, cooperation, the revival of the Romanian countryside, a higher living standard for those in the countryside areas*"[5], this party assuming the role of spokesperson for the peasantry. Thus, at least at a declarative level, both parties were fighting for modernizing, in an European sense, the Romanian economy and organizing institutions in the process.

The political programmes of the two parties gave details further on in the chapter "*Economic Programme*" about the ways in which they wanted to transform the centralized Romanian economy into a modern European one. The political programme of The National Salvation Front underlined that "*the main purpose of the political organization called The National Salvation Front is to*

[2] Tom Gallagher, *Furtul unei națiuni. România de la comunism încoace*. Bucureşti: Editura Humanitas, 2004, p. 17-33.

[3] *Frontul Salvării Naționale. Platforma Program*: Bucureşti, 1990, p. 1.

[4] *Programul Partidului Democrat Agrar din România*: Bucureşti, 1990, p. 1.

[5] *Ibidem*

*ensure the commonwealth of all citizens and the quality of life in all its aspects"*[6] and these goals could not be achieved unless "*a gradually change of the Romanian economy into a market economy*"[7] occurred, while a legal support was also provided.

The economic programme mentioned the necessity of price liberalization as an essential step in adopting the Western European economic pattern. This was to develop gradually, under the state supervision, to avoid negative effects on population and economy. The state was to control especially the prices for food, energy and fuels. The social aspect of the party's economic policy was to be emphasized here as long as The National Salvation Front included itself in the democratic left political background[8].

As far as the "private sector" of economy was concerned, the programme contained a series of references, even if they were quite vague. It says that "*The National Salvation Front is supporting the enlargement and diversification of the private sector in the national economy*"[9], under the state supervision , mentioning that the vital areas of economy like the soil and subsoil wealth, the energetic system, the railways, sea and air transport, other branches of public interest should remain state properties.

It is of interest the manner in which The National Salvation Front treats the problem of the private sector. This issue is even more interesting because the party has been a leader for more than a decade and it is easier to appreciate the relationship between intentions and facts. The party declared: "*As far as the possibility of passing partially or fully a state factory into another form of possession, The Front considers that such measures must serve the interests of the Romanian state and of those working there*"[10]. In the same time, a wider vision in the sense of new foreign investors interested in new technology, diversification and making profitable different sectors of national industry was displayed. The ways in which foreign investors could act in the Romanian economy were mentioned: capital investment, supplying of machines and equipment , providing access to technologies and know-how, creating societies with mixed capital, offering of technical advice and stuff training, assistance, management and marketing.

The programme established the main ways of transforming the Romanian economy for the years that were to come. Thus, the major economic branches that were to be regarded as national interests were agriculture, tourism, and some industrial sectors, industry being reshaped according to people's real demands, the country's resources and concerns about the protection of environment.

The development of agriculture was to become the major objective of The National Salvation Front. The goal was to create structures and institutions adapted to the Romanian realities in order to ensure the European modern standards for the Romanian agriculture. Due to specific conditions of Romania, The National Salvation Front considered it was necessary a combination of different types of property: private, state property and a mixed type.

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[6] *Frontul Salvării Naționale. Platforma Program*: Bucureşti, 1990, p. 4.
[7] *Ibidem*
[8] Ion Alexandrescu, Stan Stoica, *op. cit.*, p. 285-286
[9] *Frontul Salvării Naționale. Platforma Program*: Bucureşti, 1990, p. 4.
[10] *Ibidem*, p. 5

In a very surprising manner, taking into consideration that the programme was conceived at the beginning of 1990, the party wanted to maintain the agricultural production co-operatives (CAPs), but only as "*independent organizations of the producers with the right to decide upon all matters concerning production, selling of products and use of incomes*"[11]; the same happened to the agricultural state units (IASs) that were maintained as being very efficient from an economic point of view. All these institutions were to be supported from the state budget.

As far as industry was concerned, the economic programme of The National Salvation Front stated, in its attempt to make the Romanian industry more European, that it must pass from centralized planning and birocratic leadership to a prospective planning of the economic activity. Everything was to be accomplished gradually, in small steps. Small and medium business should be encouraged, no matter the form of property; the priority was given to those with a more rapid capacity of adapting to the market request. The National Salvation Front also considered that it was necessary the development and diversification of the services sector, a completely ignored field before 1989.Like in other European developed economies, this type of activity could have become one of the most dynamic fields of the national economy. In order to create a more functional economy like the ones in the Western countries, The National Salvation Front "*declared itself against making any differences in the matter of accumulating possessions by different social strata*"[12]. To accomplish this ideal, they introduced a complex system of economic devices that proved successful in Western European economies, including progressive duties and income taxes.

In the same time, the economic programme of The National Salvation Front was concerned about making efforts to integrate the Romanian economy into the European and worldwide economy. For this purpose, The National Salvation Front imagined new policies as far as the external economy was regarded, according to the requests of the free market economy, based on the following principles: the disappearing of the state monopoly upon the external commerce, the decentralization of the decision of external commerce and the providing of the functional and financial autonomy of traders, no matter the type of property, the replacement of the centralized planning of the external commerce activity with prospective programmes controlled by economic means, the establishment of new institutions according to the free market specific conditions.

A new aspect of European origins which was described in the economic programme was that of setting up productive, efficient, competitive and balanced structures in the economy, as well as providing monetary and institutional conditions for the developing of the Romanian economy in the following years.

Finally, in this economic programme, The National Salvation Front tried to synchronize the environment policies from Romania to those European. Thus, "*The National Salvation Front considers as very necessary the establishment and application of a national programme concerning the restoration and preservation of the ecological equilibrium, the protection of the environment. The sources of pollution dangerous for the environment and population must be eliminated*"[13]. The discussed problem was of great interest in the European countries where they

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[11] *Ibidem*, p. 6
[12] *Ibidem*, p. 7
[13] *Ibidem*, p. 7-8

already had a policy of reducing the polluting emissions, the programme of The National Salvation Front trying to be an European one.

In its turn, The Democratic Agrarian Party of Romania had in its governing programme, as a main objective, the economic revival of the country. This ideal was to be achieved by a combination of private, group and state property. From the first paragraph, one could read: "*We try to catch up with the European economy, to develop and modernize industry, tourism, public services, technology, in order to ensure an efficient activity, profitable with the condition of protecting the environment*"[14]. The reason was, of course, related to the desire of synchronizing the Romanian economy to the modern, West-European one.

The ways of solving these problems revived what once was known as the liberal programme "through ourselves", but in a more state-centered manner. Thus, the programme of The Democratic Agrarian Party of Romania claimed that "*the reconstruction of the economy must be based upon the natural resources and inner financial efforts, present and future*"[15]. Foreign capital was to be used only as a source of economic development, being limited by law. The foreign capital had the role of equipping Romania with new technology of European level.

In this modernizing process, The Democratic Agrarian Party of Romania suggested that the energy-consuming factories should be abandoned, as well as those which polluted or requested a lot of raw materials from import.

As far as the changes in the Romanian industry, The Democratic Agrarian Party of Romania wanted to maintain the sectors of national interest as state properties: national defense industry, mining and energy sector, railways, sea and air transport, metallurgy, machine construction, chemical and petrochemical industry, in order to reorganize them to be economically efficient, and to turn into private property the rest of the factories or to create new ones, small or medium in size, as requested by the free market[16]. Special attention was to be granted to the modernizing of food industry to an European standard. According to The Democratic Agrarian Party of Romania, the state should be involved in the developing and modernizing of production and services in industry, constructions, transport, commerce and tourism.

"The employees and the producers" were to be greatly supported by state. This should be accomplished by doing the following:

- developing of the financial system so as it would be able to support all economic activities, granting credits in worthy conditions;
- a price policy that would be able in a free market to maintain a balance between the price of the agricultural products and industrial products;
- the conversion of the national currency in order to facilitate the free exchange of products and services in the inner and outer market;
- the guarantee of a minimum wages meant to ensure a civilized level of living for the people;
- application of a progressive taxing upon incomes.

Being mostly centered on the rural life, the party's programme would greatly address to the Romanian villagers. It would be especially interested in raising the living standards, closely to the European one, but also in the reconstruction of the rural economy according to the Western pattern.

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[14] *Programul Partidului Democrat Agrar din România*: Bucureşti, 1990, p.. 7.
[15] *Ibidem*
[16] *Ibidem*, p. 8

These objectives were mentioned in the first paragraph of the economic programme referring to the agricultural field. Thus, we find out that "*The Democratic Agrarian Party of Romania has as its main goals the reorganization, revitalization and modernizing of agriculture, the regaining of the peasantry's dignity, freedom and equal rights with other social categories, the improving of the role and position of the Romanian village in the economic, social and cultural background of the country*"[17].

The strategy it suggested in order to make European the Romanian rural world was extremely original. Thus, the party's programme contained a form of modernizing that began from the forms of property already existing by then:

- the group property in which the land belonged to the peasants from the Agricultural Production Co-operatives;
- state property;
- state and co-operative associations;
- private farms in the areas with no co-operative associations.

In other words, The Democratic Agrarian Party of Romania wanted to make the Romanian rural world European, but in a collective frame. In addition, this party claimed the land as a national treasure that cannot be commercialized only by Romanian citizens. Only houses and the nearby land could be sold with no restrictions, if situated in the village inhabited area.

Even if the programme has nuances about this problem, several Marxist accents are easily traced. Admitting that the collective structures in agriculture were forced ones, The Democratic Agrarian Party of Romania wanted to make right some of the injustices done to the peasantry during 1949-1962, without asking for the disappearing of the forms of agricultural exploitation from the communist era. That is why they wanted the land to be used in common, but in the form of free associations. A part of the land should, nevertheless, pass to the peasants, idea which could be found in the programme of The National Salvation Front, too, in order to work it individually and sell the products according to their will. The surface given to each peasant should depend on the capacity to work it alone or together with the family. In this way, The Democratic Agrarian Party of Romania wanted to create a village with "*a modern agriculture, a highly productive technology, with peasants able to master their work and products*"[18], like in the Western rural world. The European influence was obvious as long as, in order to increase their profits, the Agricultural Production Co-operatives and the Agricultural State Units were allowed to create "*their own places for selling the products they obtained, meaning stores, small centers or kiosks, in rural or urban areas. The stores could belong to one or many such associations in order to ensure a diversified merchandise and a continuity in selling*"[19].

The process of becoming European was even more obvious in the fact that The Democratic Agrarian Party considered the Agricultural State Units "*an important sector of Romanian agriculture equipped with all the necessary utilities, applying advanced technologies, modern methods of growing plants and breeding animals*"[20]. All such institutions were to remain state properties, they could not become private. The party admitted, though, one concession: the above mentioned institutions could organize themselves, if the employees wanted, in

[17] *Ibidem*, p. 10
[18] *Ibidem*, p. 11
[19] *Ibidem*, p. 14
[20] *Ibidem*

private societies in which the state had to possess 51% of actions, the rest of 49% belonging to the employees or other citizens. As far as the I.A.S. were concerned, the party accepted the idea of creating their own stores to sell the products or even "*industrial unities and workshops to realize industrial products or provide services to other unities or population*"[21].

Like in the case of the IASs, modernizing the agriculture implied the modernizing of the Stations of Mechanization of Agriculture (SMAs) by providing a mechanized way of harvesting, services for agricultural associations or private producers, making of tools, equipments, metal confections and specialized transport of agricultural products.

Like in the case of IASs, the SMAs should remain, in the vision of The Democratic Agrarian Party of Romania, as state property, but with the autonomy of making contracts, collaborate with other unities from agriculture, food industry or forestry. Only in a next stage, these could become private societies with the state possessing 51% of the actions.

As one can easily notice, as far as industry is concerned, the party's programme is opened to the innovation, to provide the Romanian industry with a European vision, but as far as agriculture is concerned, the programme is quite conservatory, with few new ideas.

By analyzing the economic programme of The National Salvation Front and that of The Democratic Agrarian Party of Romania it is easy to notice that, despite the efforts of breaking up with the past, they are still marked by the economic ideas promoted before 1989. The fact that they were conceived during January- February 1990 is very important. Anyway, they represent a first step in the attempt of transforming the Romanian economy into a European modern one. The years that were to follow brought many changes in the process of passing from a centralized to a free economy.

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[21] *Ibidem*, p. 16

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# DEMOGRAPHIC CHANGES IN EAST CENTRAL EUROPE IN THE PERIOD OF TRANSFORMATION

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**Abstract:** The process of transformation in East Central Europe have exerted a significant influence on both demographic processes and structures. In this paper a description of some dynamic changes in the scope of population which have taken place since 1990 is presented. However, the main objective of it is an analysis of natural movement of population of East Central Europe. The author focused mainly on fluctuations of birth and death rates as well as marriage and divorce rates. The research period for this paper ends in 2011. The author analyzed statistic data derived from some national censuses which were held in chosen countries of the above-mentioned region.

**Key words:** East Central Europe, transformation, natural movement, population, demography

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## TRANSFORMATION PROCESSES AND DELIMITATION OF EAST CENTRAL EUROPE

Analyzing population changes in the period of broadly understood transformation is an interesting subject for research. Political and economic changes have accelerated social and demographic transformation in Central Europe. The transformation itself, perceived as a multidimensional process, can in a way reflect changes in law as well as introduction of a democratic – capitalistic constitution and it is also a feature of globalization or it can indicate a complex modification of a social system (Kołodko, G., 2007, Blok, Z., 1999).

It is problematic to unequivocally determine a period when the transformation began and finished, for example, in Poland it was triggered at the turn of 1989 and 1990 by a change of a political system (Jasiewicz, K., 2009). However, it is even more difficult to determine and clearly define some virtual phases of this process (Staniszkis, J., 2001) which can be associated with the process of free market evolution as well as with European Union membership or changes in behavior patterns of the society. As some intense social changes are still ongoing and they obviously do affect the processes of demographic transformation it can be assumed that this process is not finished and still evolving (Ziółkowski, M., 1999).

The issue of transformation taking place in the region concerned obligates the author to make an attempt to delimit East Central Europe (Halecki, O., 2002). Diversity of the continent has led to defining the geography of East Central Europe from the political and cultural point of view and, what is vital, an internal division of Europe has been modified several times along with the political, economic and social transformation (Rykiel, Z., 2006). When analyzing East Central Europe it is impossible not to mention the term Mitteleuropa (Eberhardt, P., 2005) or a dual division into Eastern and Western Europe (Otok, S., 2002), however, this polarization is now gradually disappearing as a result of the fall of Communism and dissolution of the Union of Soviet Socialist Republics (Mucha, J., Keen, M.F., 2004). Currently observed integration processes taking place in Europe are leading to development of its geopolitical structure. In the future, most probably, it will be necessary to delimit the region again (Hudson, R., 2001, Wendt, J.,2001).

In this paper the author analyzes these countries of East Central Europe which are characterized by similar processes of democratization. However, the analysis has been limited to the countries of comparable socio-cultural characteristics. Therefore, the extend of the territory of East-Central Europe which was described by S. L. Wolchik and J. C. Curry (2011) has been slightly altered for the purposes of this study. With regard to the above the analysis has been carried out for the following countries: Poland, the Czech Republic, Slovakia, Hungary, Romania, Bulgaria, Ukraine, Belarus, Latvia, Lithuania and Estonia. Most of them are European Union members, however, Belarus and Ukraine are two countries of slightly different characteristics. Belarus is different because the process of socio-demographic transformation and democratization processes taking place in this country are quite specific. Ukraine, as not a long time ago it was considered a potential European Union member and now it is facing an armed conflict. Despite of this, taking the geographical location of these two countries, both Ukraine and Belarus are extremely interesting cases which should not be overlooked.

**POPULATION CHANGES**

In the group of analyzed countries Ukraine has got the largest population of 46,0 million inhabitants at the end of the analyzed period of time. The second and third most populated countries are Poland and Romania having respectively 38,5 and almost 22,0 million inhabitants. In the group of the least populated countries are Baltic countries, especially Estonia where in 2011 only 1,3 million people lived. The whole analyzed region had a population of 155,4 million in 2011. As a result of depopulation processes taking place in analyzed countries in 2011 there were 10,1 million people less than in 1990 what means that the population shrank by 6,1%.

When focusing on the dynamics of population change observed in East Central Europe it has to be emphasized that Slovakia, the Czech Republic and Poland are countries where the highest, but not spectacular, increase of registered inhabitants was noticed during the period of 1990-2011. It was the increase by 2,1-2,4%. The most stable situation was observed in Poland at that time where population was not fluctuating significantly during almost the whole analyzed period and in the result the population increased by 1,1%. According to statistical data there were not any significant changes observed in populations of Hungary, Romania and Belarus as well. The two most depopulating countries were Latvia (-22,1%) and Bulgaria (-17,2%). A disadvantageous situation was also observed in Estonia, Lithuania and Ukraine where depopulation rates exceeded 10,0% (Figure 1).

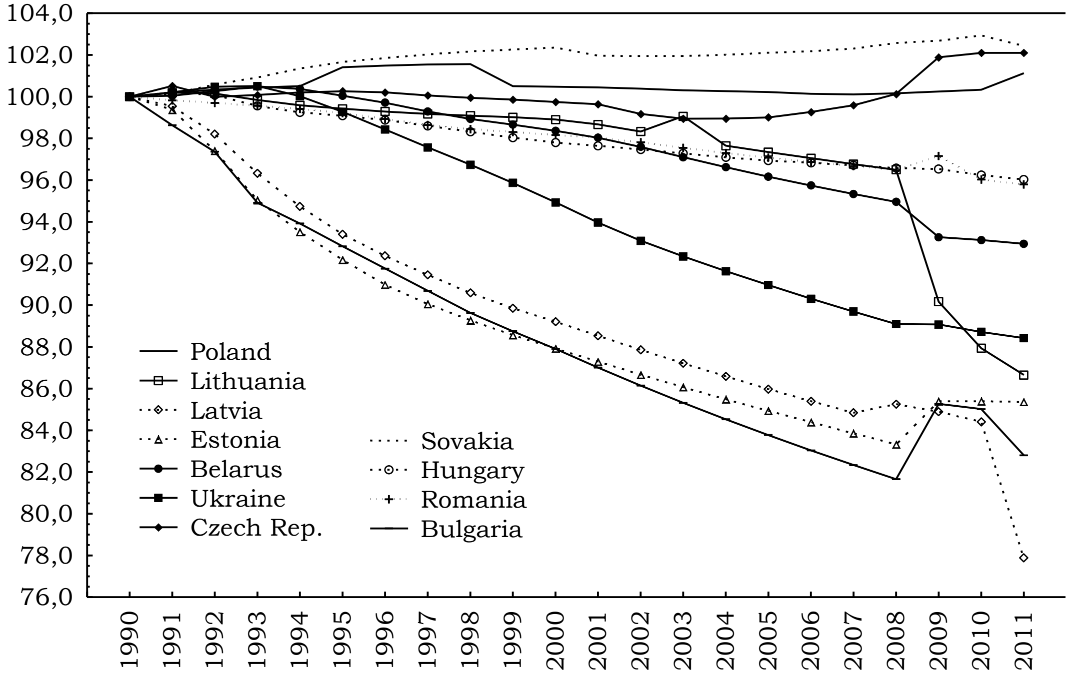


**Figure 1**. Dynamics of population change in East Central Europe (1990 = 100,00%)
(Source: own work on the basis of dispersed data)

It is worth mentioning that it is a common situation that just before the socio-political transformation taking place in a given region, a systematic growth of the number of inhabitants is observed. Therefore, there is a clear connection between the population dynamics and the transformation processes. It was the most visible in the countries of the former Soviet Union. The highest population decrease was noted in the Baltic countries (except Lithuania) in the period of 1989-1991 while in Ukraine and Belarus not earlier than 1993. The transformation had the most visible impact on the population of Bulgaria where after 1990 depopulation processes were extremely intense. However, in Hungary the first signs of depopulation was observed in 1985, but the most intense depopulation processes were noticed at the beginning of the transformation period. The rest of the analyzed countries did not faced the same pattern of depopulation and their demographic situation was relatively stable and the depopulation processes was not observed immediately after the fall of communism but later – during more advanced phases of the transformation.

## CHANGES IN VITAL STATISTICS

A major decrease in vital rates in East Central Europe has been observed which is typical for the demographic transition. It is worth mentioning that both Poland and Slovakia were in a relatively good situation considering vital rates during the whole research period as the natural population drop was observed only during the short period of 2002-2005 in Poland and in the period of 2001-

2003 in Slovakia. An exceptionally difficult situation can be observed in Ukraine regarding this matter. The unprecedented high drop of -7,6‰ was noted there in the period of 2000-2002 and in the year 2005 (Figure 2). A considerable advantage of a death rate over a birth rate is also a crucial issue in Bulgaria (Mladenov, C., 2006). It can be stated that a characteristic feature of population growth in East Central Europe is its deep decrease in the Baltic countries after 1993 – especially in Latvia. However, in the next period demographic conditions in these countries was gradually improving (Cicharska A., 2009). Nevertheless, the demographic situation of Belarus and Hungary was continuously deteriorating and in 2011 the above-mentioned factor did not exceed -4,0‰. In the Czech Republic and Romania the analyzed demographic changes were not as severe as in the other countries as in the last decade their population growth rates did not change significantly (Stupariu, M., 2011).

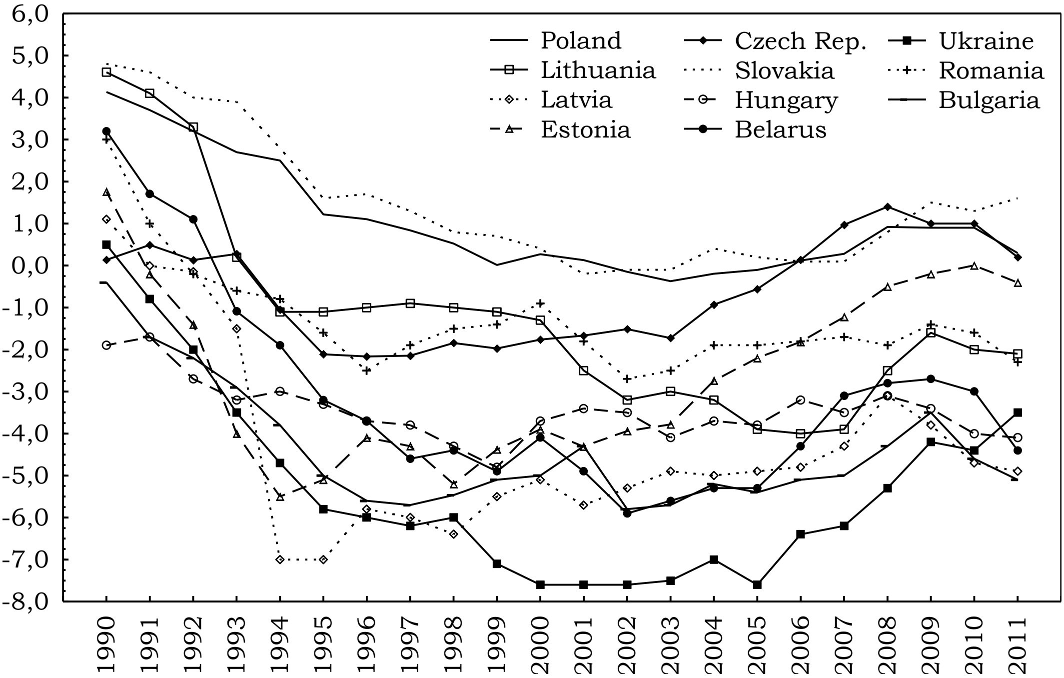


**Figure 2**. Changes in the population growth rate in the countries of East Central Europe in the period of 1990-2011 (in ‰)
(Source: own work on the basis of dispersed data)

The most important role in shaping the population growth rate in East Central Europe played a crude birth rate. In all analyzed countries the birth rate declined and it is highly possible that this trend will continue (Długosz, Z., Raźniak, P., 2008). An exceptional drop of the crude birth rate was noted in Latvia as in 2011 it was only 9,0‰ whereas at the beginning of the analyzed period it was 14,00‰. A visible birth-rate drop occurred also in Lithuania (4,3‰) and less significant ones in Estonia, Slovakia and Belarus. The same problem concerns also Poland and Hungary where the birth rate was also gradually declining in the analyzed period.

A decade preceding the transformation not only the natural factors has an effect on the birth rate (e.g. echo of the post-war baby boom) but social policies also. In many countries of East Central Europe these policies were promoting the traditional family values (Matysiak, A., 2005). After 1990, along with numerous changes in the scope of these policies a fertility rate declined and an average age of having first child increased. It has to be emphasized that the "fertility trend" which started in the 90. did not change although the baby-boom cohorts entered an optimal reproductive age. Once accepted behavior patterns are still being followed and they seem to be more and more similar to the trends observed in Western Europe.

The death rates in the analyzed period were not fluctuating as significantly as the above-mentioned rates. For instance, in Poland the death rate was rather stable (a bit more than 10,0‰) until 1996. In the next years it was fluctuating insignificantly and oscillating between 9,4‰ and 9,9‰. Thus, in this case as well as in the Czech Republic and Hungry it can be stated that the mortality rate is stable. However, this trend is not observed for other countries. An intriguing example is Ukraine where the mortality rate significantly increased during the first years of the transformation. The death rate ranged from 15,0‰ to 16,0‰ in the period of 1994-2008. The same increasing trend was also observed in Belarus, Latvia and Bulgaria. However, it shall be emphasized that data concerning the Baltic countries showed that the death rate rapidly increased in the first period of the transformation and slowed down in the next years thus it can be stated that the political situation of countries is a contributing factor and it influences a mortality rate (Stasas, M., Michalski, T., Palmowski, T., 2002). The social reforms which were implemented or discontinued after the fall of the communist system had a significant impact on the death rate in East Central Europe.

In the years preceding the socio-political transformation in East Central Europe the most important factor determining the fertility rate was a marriage rate (Iglicka, K., 1993). However, ten years later in the same region some changes typical for the second demographic transition were intensified as the behavior patterns of Western Europe (Matysiak, A., 2005), globalization processes and the political transformation were in progress (Górecka, S., 2006). It means that more people chose informal relationships and they did not want to get married. Obviously, this so called "social modernization" was not progressing at the same pace and under the same conditions in all analyzed countries. The situation in catholic Poland is not the same as in the Czech Republic where liberalism and individualism in social interactions are widespread (Fialova, L., 2006). Some important elements of the family life transformation are also changes in the labor market and birth control policies.

When analyzing fluctuations of the marriage rate in the selected countries of East Central Europe it becomes obvious that it was a relatively high percentage of formal relationships at the beginning of the transformation (Fig. 3). It is especially visible in Latvia and Romania where more than 8,0‰ of relationships were formal ones. However, in the next years this percentage was declining gradually (Precupetu, I., Precupetu, M.). When considering sustainability of marriages in the analyzed period, Poland, Romania and Bulgaria are the countries where marriages lasted longer – mostly because of the existing cultural conditions. This situation has been changing over the years as the processes of social modernization are still in progress but when compared to the situation in Latvia, being a representative of the post-soviet countries, this trend is not alarming (Figure 3). In Latvia a large number of registered partnerships has become a typical feature of the social transformation. Among many different reasons for a high divorce rate the most important ones are unhealthy lifestyles of men and poor living conditions. An additional factor is a noticeable growth in the number of women who are economically independent. What is more, educational negligence in the scope of family issues and its importance for societies as well as in the scope of interpersonal communication are not factors in favor of formal relationships (Eglite, P., 2012).

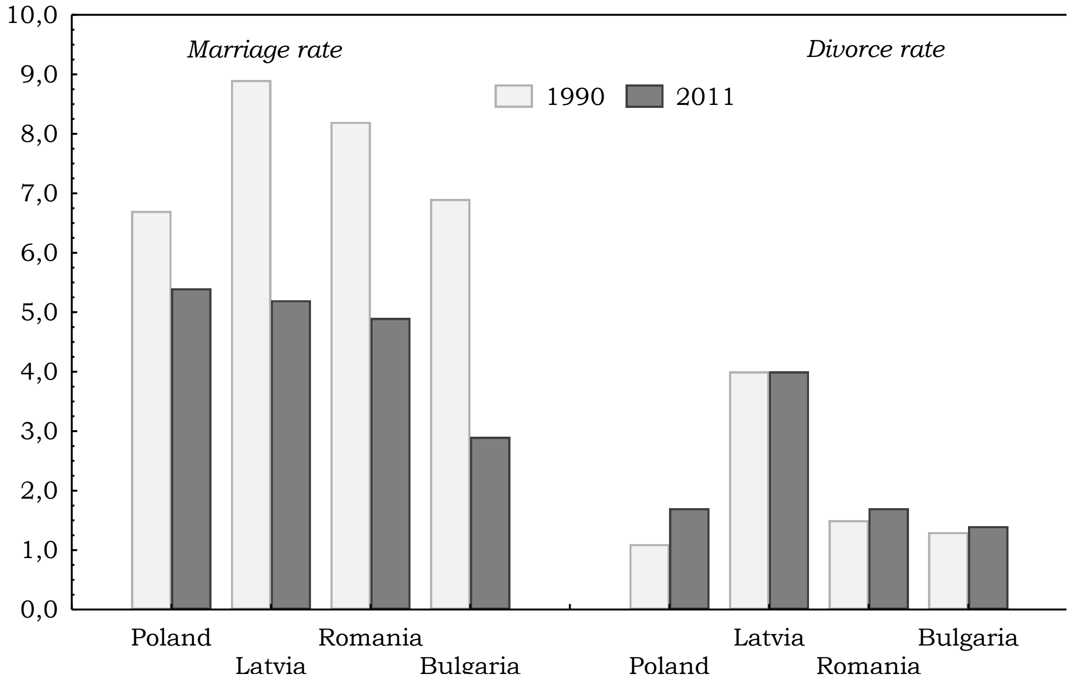


**Figure 3**. Changes in the marriage and divorce rates in the chosen countries of East Central Europe (in ‰)
(Source: own work on the basis of dispersed data)

**SUMMARY**

All historically and culturally conditioned events which took place in the transformation period in East Central Europe have led to numerous demographic changes. The process of state economy transformation has also played an extremely important role in those processes as changes in labour market and unemployment have an impact of fertility and families. It is worth mentioning that although the process of social modernization is still ongoing the demographic condition of many countries of the region is relatively good. Negative population changes were observed mainly in the post-soviet countries, especially in Ukraine where the rate of depopulation was the highest in the analyzed region.

In all countries of East Central Europe a major social changes took place in the research period as it was a time when a brand new dimension of interpersonal relations emerged. What is more, it was intensified by a growing wealth gap, decrease of trust and relationship permanence (Giordano, C., Kostova, D., 2002). The causes for this situation are, among others, the state economy transformation along with some common economic problems including

deindustrialization, globalization and neoliberalism (Czepczyński, M., 2008). It must be emphasized that the advancement of the democratization process of a given country has also a great impact on demographic processes (Bjørnskov, C., Dreher, A., Fischer J., 2008).

At the time of social modernization and global economic crisis it is very difficult to predict further demographic changes unambiguously. Since 2008 in East Central Europe, especially in the Baltic countries, the economic and social crisis has been the most visible. Integration processes taking place in Europe as a part of the European Union development and an inevitable demand for young workforce expressed by aging populations of many European countries which can be met only by an increased inflow of immigrants will lead to noteworthy changes in demographic potential of Europe.

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# LOCAL DEVELOPMENT MODEL BASED ON TERRITORIAL IDENTITY AND HERITAGE.THE CASE OF ROMANIAN "ŢARA"/LANDS

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**Abstract:** Globalization and local territorial identity are two concepts placed in opposite "hemispheres", but the political social, economical and cultural reality shows close links between them. The need to identify a course for the territorial development which should be anchored in the two contradictory processes represents the success key to the contests in which the territories compete. In this context, the present study focuses on the issue of sustainable local development of the "ţara" (land) type territories in Romania, by following a development model that should properly capitalize the identity feature of these rural areas. The working plan consists of three subpoints: the conceptualization of the territorial identity, the territorial identity capitalized in the local development process and the perspectives of shaping the local development based on the local identity distinctiveness. The conclusion is that, by being placed into a coherent process of local development, by appealing to "smart" types of territorial management tools, the distinctiveness of the "ţara" type territories can be sustainably capitalized. The identity and local heritage represent central elements around which one must rethink their development and the community should reconfigure its relation with the territory.

**Key words:** territorial identity, heritage, local developement model, "ţara" type areas

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## THE THEORETICAL CONCEPTUALIZATION OF THE TERRITORIAL IDENTITY

In the present context of the "economic crisis", the territorial identity is more and more debated, being placed at the junction between the processes of regional development with the local ones. The search of alternatives to already existing models of development has triggered the working-out of development strategies differentiated depending on the territory potential, particularly based on the factors which can play a major part in achieving the goals of economic growth and territorial development. The territorial identity is more and more revealing istelf as one of those major factors which re-shape the future development of a territory. Thus, this particular identity represented by the joint union of relations, norms and assets, constitutes itself as a ”mirror” of the mental representation of the territorial collectivity, by ”showing” both the development potential of that particular territory at a specific moment in its history, and its influence on the future behaviour of this collectivity regarding the regional development due to the ”perceived” image (Pageon, 1990).

The region individualization, both through physical and human features, triggers the identity of the territorial entity represented by places and people. In this respect, Poche studied the local by starting from the social rendering of the space (Poche, 1978), which have a continuous innovation and transformation capacity determined by the collectivity. Thus, through this particular approach, the territory is considered as a process related with the ”exterior”, the relation system that a collectivity is maintaining with the exterior, thus forming its ”territoriality”. The space features form themselves within the production of various territories by the action of the human component which finally gives a certain identity to it (Pelegrino, 1982). For the community, the places where it spends its life will turn into territories of belonging, mental spaces. The sense of affiliation to a space is doubled by its positioning with regard to other spaces. In this context, Pelegrino had identified the ”space of reference” which, in fact, represents the space of positive or negative shaping, of capitalization and de-capitalization of the space of belonging. The apetite for local identity also lies in the need for territoriality whose reasons are found in the sense of de-posession, respectively between the fight for identity and power (Barel, 1984). Thus, the region is a cut-out from the territory which is particularly disturbed by the contemporary transformations, represented by the cosntant movements of de-territorialization and re-territorialization. Michael Bassand and Silvio Guindani (1982) demonstrate that region is the result of a living process, an identity system subjected to various external pressions, where contradictory fights are born and ways which allow the preservation of the local ”culture” as a tool of selfdevelopment. This represents the result of the impossibility to intervene on the global society, the social groups turning towards a search of identity, respectively a new territoriality, less subjected to national factors as opposed to local ones. In this respect, Bassand and Guindani consider identity as being ”…an image created by regional actors” (Bassand and Guindani, 1982, p.11), and found at the junction between individual and group. Evidently, this construction is not the exclusive result of the internal social processes, of the social structures specific to a region, but also of the perceptions of the external groups which differ depending on the already existing relations among themselves, respectively dominance and dependancy. The regional identity, most of the times, appears as a defensive form, manifesting itself through an economic, social, political and cultural resistance and fight. This resistance, due to some projects and viable strategies, can induce a certain autonomy, the identity thus becoming offensive (figure 1).

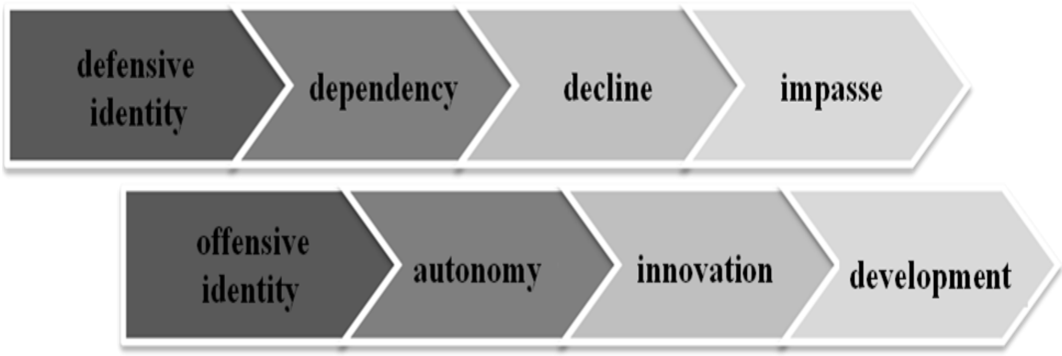


**Figure 1**. The identity evolution
(Source: Bassand and Guindani, 1982)

The autonomy, seen as a development exclusively based on local ressources, cannot be obtained without an offensive identity, necessary to the boosting of the localities and regions in their process of adaptation and innovation. Thus, according to Bassand and Guindani, there cannot be a local or « endogenous » microregional development without an identity supported by an autonomy (Bassand and Guindani, 1982). The regional and local identity can be partially analyzed through collectivity representations, respectively through its imprint on the territory. The collective representations are necessary to the analysis of the local identity, thus representing the most important aspect. The population itself re-writes its identity in the spaces where it operates ”valuable activities”, significant to it (Rambaud, 1983a). The space representation, thus plays an important part in the affirmation of the identity of a regional and local territorial collectivity. Space and group representations, spatiality represent factors of unity and identity for the local collectivities (Rambaud, 1983a) and, also, factors of dispertion and alteration, the identity spaces equally building themselves through their difference from ”others”. The comparison with others represents a decisive feature of the identity, especially in its spatial delimitation. This identity is modifying in time, is evolving, by implying an ability to change and innovate due to its relations with the exterior.

## THE TERRITORIAL IDENTITY CAPITALIZED IN THE LOCAL DEVELOPMENT PROCESS

In the local development process, the territorial identity defined as a modern, comunitary form of cultural, symbolic co-similitude, shared by a group of people who live on a particular territory and who organize themselves in order to defend the spiritual-identity assets they share (Flora, 2011), plays an increasing important part. Defining the territorial identity in this interpretation cannot be seen apart from the actions of the groups which act for the placement of the local resources into a heritage.

Bernard Pecqueur (2002, 2007) highlights the importance of the resources in the local development by giving it extra features, thus defining the notion of territorial resource. The very notion as envisioned by Pecqueur comprises both generic classical material resources and the humans and their activities, respectively the relations that define them as specific resources, material and immaterial (Pecqueur, 2007). These resources, either material or immaterial, latent or potential, can be capitalized through projects. The territories exist due to the projects designed through the involvement of the resources (Lajarge and Roux, 2007).

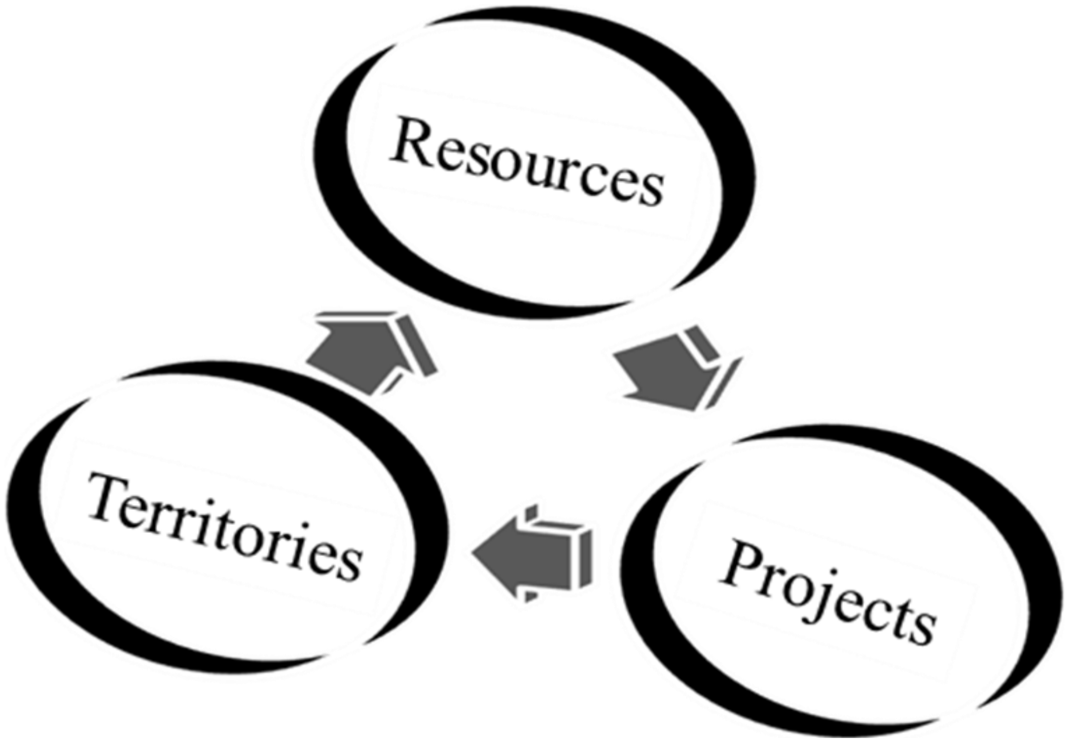


**Figure 2**. The virtuous circle. Resource/Project/Territory
(Source: Lajarge and Roux, 2007)

Within the territorial resources, the heritage plays an important part, being supported by the assets that it generates: economical, aesthetic, artistical, historical, cognitive and social (Greffe, 1990). The proces of heritage formation can be thus decomposed into five stages, prone to generate various types of activities:

- the (re)discovery of the heritage, implies the highlighing of some objects, places savoir-faire, customs etc. In this stage starts the selection of the assets representative of the heritage;
- the certification of the heritage when, based on observations and agreement, the selected assets are replaced into a historical background;
- the preservation and restoration of the heritage;
- the display of the heritage, when it becomes public, being shown for the discovery and understanding of the large audience;
- the capitalization of the heritage is the maturity stage when heritage as resource is capitalized, both as a landmark, and as an activity-generating resource (Landel, 2007). In this sense, heritage was considered a common asset that helps communities to live on (Chevallier, 2002). The capitalization of these ideas in order to develop future innovative activities (Pecqueur, 2002) where heritage is a territorial resource, can be carried out only if one fulfills two terms: the association of the heritage with other products and a territorial management favorable to its capitalization

(Landel, 2007). Thus, the heritage becomes the support for territorial networks (table 1).

**Table 1**. The process of heritage integration into territorial construction
(Source: Landel, 2007)

| Heritage as ”territorial resource” | Heritage as ”territorial landmark” | Heritage as ”activity generator” | Heritage as ”support for the network of actors” |
|---|---|---|---|
| Heritage (re)descovery | Research Documentation | Identification of the actors and projects which can support heritage capitalization | Identification of common heritage objects within territory or with other territories |
| Heritage attestation | Inventory Classification Labeling | Project placement in an intercession ”coherent” for the territory | Inventory, studies, placement in a network, exchanges |
| Protection Restoration | Restoration Recomposition | Preservation chart, creation of craftsmen, insertion | Exchange of savoir-faire, formation, restoration project sites |
| Exhibition (Re)Interpretation | Symbolic tags, development of activities for locals | Exhibitions and museums, tourist activities development | Tourist circuits and theme routes, itinerant exhibitions |
| Heritage capitalization | Accommodation, services, development of cultural activities based on heritage: festivals, holidays | Accommodation, restaurants, tourist products, rentals, sales | Development of products in network: group tickets, sales of sojourns, capitalization of territorial products |

The same authors identify three possible interpretations of the term of heritage: assessing (it implies the assessment of the economical value of the heritage through an analysis of the relation between the economical development of a territory and the heritage mobilization); institutional (heritage is no longer seen as a collection of objects, but as a social relation, thus being a combination between ”to be” and ”to own”); territorial (heritage is seen as an engine for territorial construction) (Landel and Senil, 2009).

In conclusion, the terms of local identity and heritage can be re-interpreted from the perspective of their tranformation into resources for a sustainable local development and construction (Pecqueur, 2002, 2007; Landel, 2006; François et al., 2006; Landel şi Senil, 2009). Their part in the territorial development lies in quality and innovation, as engine necessary to competitiveness in the context of generalized competition between territories: ”linked to other elements, heritage gives them specific features which turns them into territorial resources [...] territorial innovation often targets new ways of articulation between actors of very different origins around the use and construction of these resources. Thus, by being part of the territorial dynamic, heritage has acquired a new status and force. In its turn, it lies at the foundation of territorial righfulness” (Landel and Senil, 2009, p.2).

The model of endogenous development suggested by Tolón-Becerra and Lastra-Bravo (2009) suggests a balanced approach, which integrates information, indicators and over local strategies, on the other hand. Local collaboration, local partnerships and initiatives of local development mean opportunities which, through capitalization, give the territory a high degree of competitiveness in comparison with other territories. The commitment of the local community in the design of its own development creates a solidly anchored system in the local potential, which also capitalizes external opportunities.

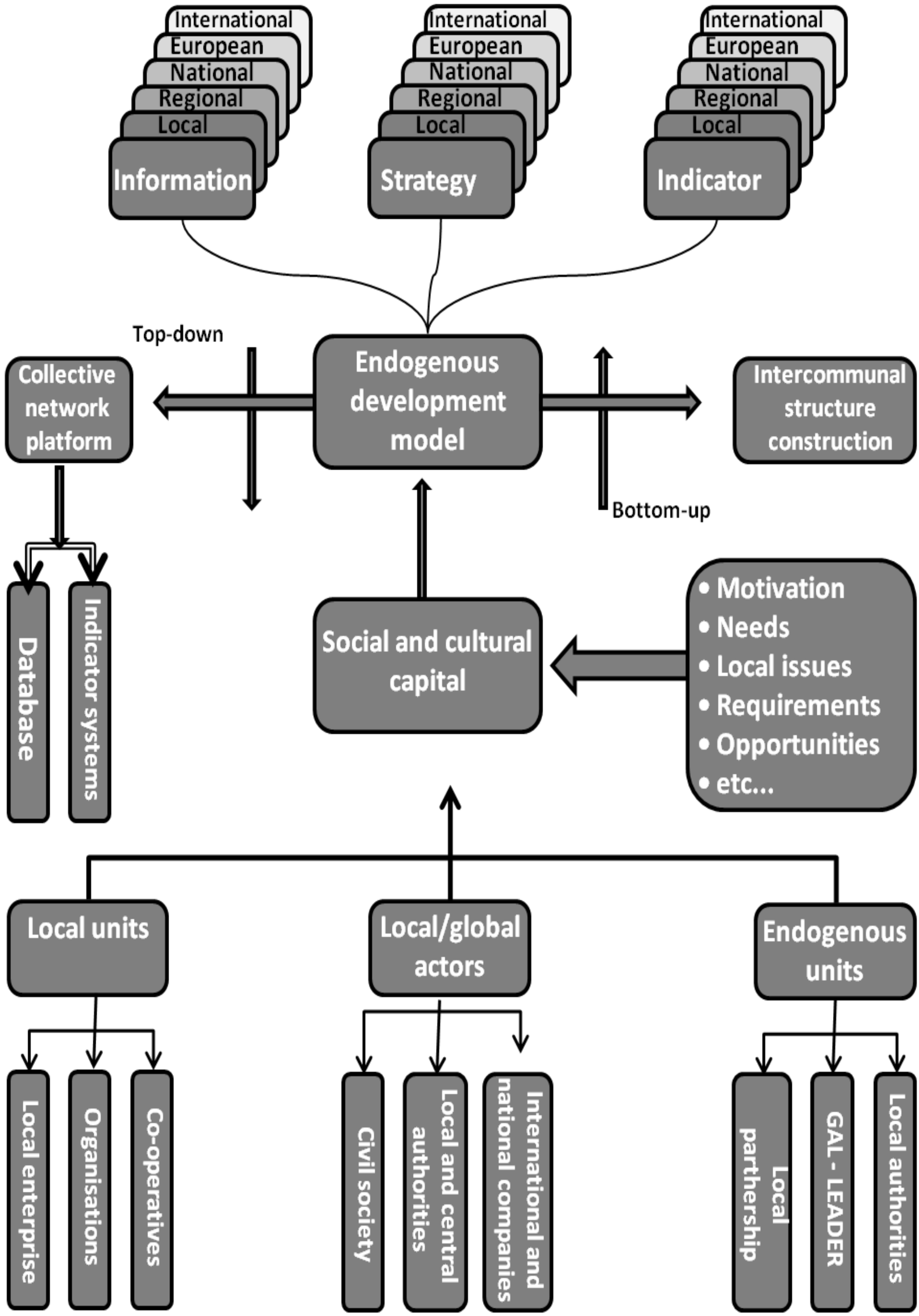


**Figure 3**. Endogenous development model
(Source: Tolón-Becerra and Lastra-Bravo, 2009)

**THE PERSPECTIVE OF SHAPING LOCAL DEVELOPMENT THROUGH TERRITORIAL IDENTITY**

In the context of globalization and competitiveness, seen as a goal for territorial development, numerous rural areas have become obsolete, not being able to compete with ”the global cities”. After a period of decline and search of alternatives appropriate for these areas, solutions seem to come from the field of local development, being more and more visible the initiatives directed towards an integrated local development, seen through a neo-endogenous perspective.

The concept of endogenous development is positioned in the middle of the global-local model where the social and cultural capital are considered the main forces of the development of a territory (Cabus and Vanhaverbeke, 2003). The proper capitalization of the local resources and of identity landmarks act as a trigger for the mechanism of economical development and creates a favorable circumstance for the development of a local productive system (Pecqueur, 2002). The local positive results, coming from experimental initiatives can be seen as examples and capitalized in the real local development. This perspective can be best capitalized through the exploration of the interface between top-down (exogenous) and bottom-up (endogenous) processes (Ray, 2003). The local communities can be easily involved in this process due to a closely linked economy – local feature and, especially, due to an easy adaptability to the opportunities offered by the territory, which, are already capitalized, at an individual level. The understanding of the importance of collaboration and part-taking in the process of local development implies a local action targeted towards the capitalization of local potential within a more complex framework and, yet, around common objectives. The importance of a collaboration between local actors is rounded by the necessity to assume a long-term commitment. The capitalization of the local identity distinctiveness must be performed within a regional context which should comprise the directions, on a superior level, and define the pillars around which the development should be built.

The adjustment of the local policies to the superior territorial directives and the preservation of the local uniquenes represent for the ”țara” type areas, at the same time, an alternative development opportunity and a challenge. The 18 ”țara” type areas in Romania have a series of common features which place them on top of the areas with endogenous potential of development. Their common features are: the historical value in the local old autonomies from the Middle Ages (Cocean, David, 2013), the morphology of intra- or peri-Carpathian depressions, the ethnic and confessional unity, the deeply rural characteristic, the archaic accents of the everyday life and a living authentic folk culture (Filimon, 2012). To these features we should add the quality of mental spaces sequentially expressed through unity, behavioural solidarity, the sense of affiliation to collectivity and living area, born, in time, from the relations formed between man and his living area, all these contributing to the achievement of an evident regional coherence. This regional coherence has set the ”țara” type areas as elemental functional cells of the Romanian space, the best keepers of the national authentic identity distinctiveness. Thus, a benefit singles out through the comparison of the ”țara” type areas with others, which is totally uncapitalized, in a Europe of globalization and unification, whose development goal is the social, economical and territorial cohesion from which these spaces benefit (Cocean, Filimon, 2012).

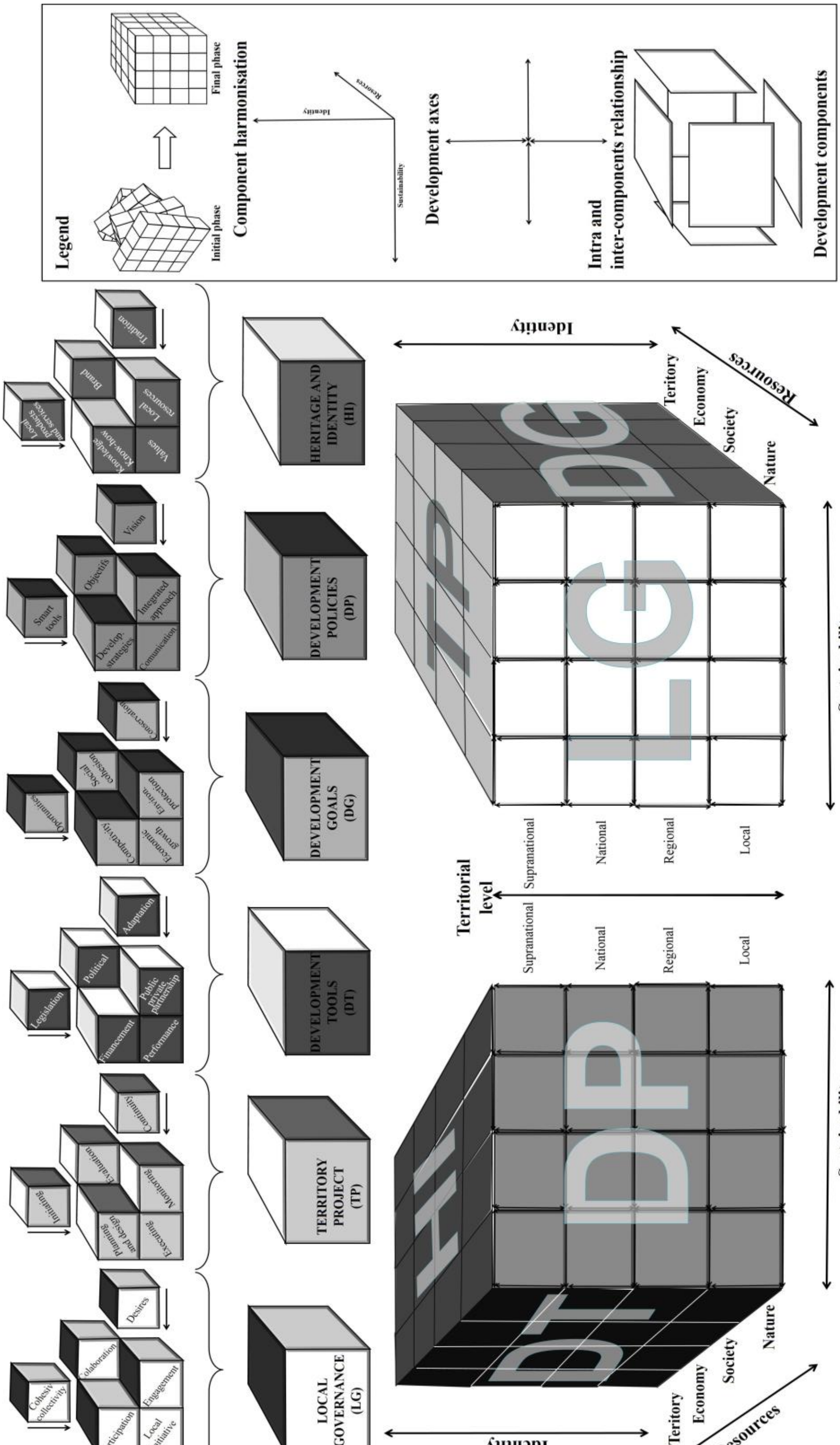


**Figure 4**. Local development model based on territorial identity and heritage

In the context of an increasing development which can be reduced to competition, the only thing able to ensure the existence and continuity of the ”lands” is their deep originality and the heritage features which have become an important source able to ensure, through a rational, proper and inspired exploitation, the progress of the local communities which identify themselves with the respective territory (Cocean, 2012). Starting from these realities, we consider that the ”țara” type areas in Romania represent a certain potential of turning into ”project territories”. The project territory (Landel, 2006, Landel and Senil, 2009) fit to their needs ”builts” itself around a model of local sustainable development based on identity and heritage.

Thus, for the sustainable local development of the ”țara” type areas (and of other rural authentic spaces, with a good territorial coherence and with innovative elements and local distinctiveness), we propose *the local development model based on territorial identity and heritage* (fig. 4). We think that identity and heritage represent exactly ”the dowery” of the ”land” type areas, with aspects that are slightly different from a territory to another. This particular model has to focus on the neo-endogenous type of development, based on the local distinctiveness, where the decisional factors and communities must collaborate for the development and the joint promotion of their living space.

The pillars which support the model of sustainable local development, based on identity and heritage, are four, being represented by: *the development goals, development policies, development tools, territory project, territorial identity and heritage, respectively the governance.* They are the general parameters which express themselves differently on the territorial level, depending on the local distinctiveness. On a higher level, the development goals are represented by the economical growth and territorial cohesion. Evidently, depending on the territorial distinctiveness, they can decline as lower rank goals (preservation, environment protection etc.). The development policies are represented by the discovery, for each particular ”țara”, of the opportunities and the most ”adequate” formula in the dosage of the bottom-up and top-down directions. Moreover, are important the tools which accompany these policies. The development tools (political, financial, relational...) used in an efficient manner contribute at the armonisation of the development process. The integration of the project territories as component of the sustainable local development, in the spirit of the strategic thinking of territorial development, would allow the valorisation through preservation of the local characteristics. The heritage and territorial identity, as important variables of the development model, must integrate components such as: resources (generic and specific), knowledge and local know-how, products and local services, customs and assets. All these can be transposed as local brands, as a collectively assumed image of the combination. At the same time, brand can represent a ”smart” type tool for the territorial management. Governance can also be declined in various stages differing from one ”țara” to another, with the awareness of the collective wishes and aspirations, by the local communities and authorities which should assume this responsability, involvement, local initiatives, part-taking, collaboration and partnership between the civil society and local administration, commitment etc. The local actors must put themselves into motion for the development of the social and cultural capital, through promotion of an increased ”governance” and co-operation on various territorial levels (horizaontally and vertically) based on a continuous system of negociation between public and private actors (Bache and Flinders, 2004).

The model renders the multiple possibilities of combination between the six variables for a greater likeness to the perfect Rubik's cube model. ”Perfection” in this particular case is given by the sustainable development, as a challenge difficult to reach. Furthermore, this model suggests that, in order to solve the cube, one needs a strategy, the random twists not being able to lead to the expected results. So, the model renders both the complexity of the territory, with multiple declinations, depending on the local distinctiveness, and multiple combinations between the four variables, thus revealing the necessity to integrate strategic thinking into the actions which target the territorial development.

Moreover, the suggested model equally integrates the duality of the ratios between the internal environment (which focuses on the mobilization of the local collectivities around the heritage and sustainable capitalization of common assets and symbols) and the external one (towards which is rendered the idea of distinctiveness, uniqueness and a certain image of local Romanian authentic label). This image transmitted to the exterior as local label (territorial brand) targets both capitalization through the increase of amenity, but, at the same time, the increase of the degree of competition of this type of areas.

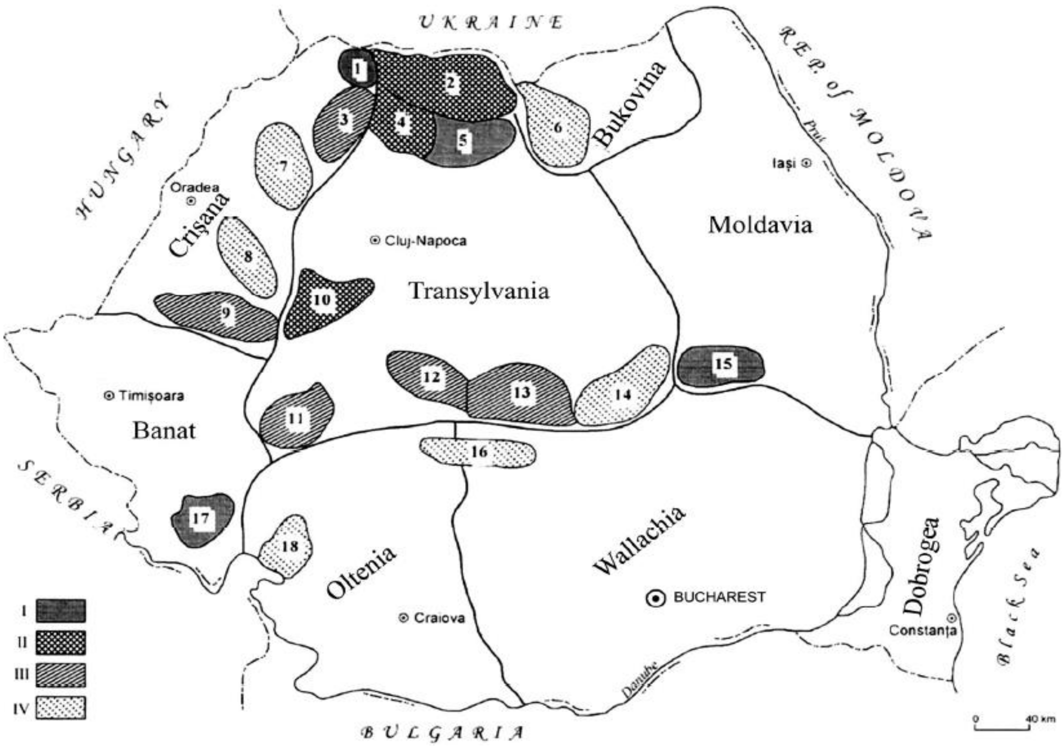


**Figure 5.** The brands of the Romanian “lands”.

I. Folklore: 1. Oaş Land; 5. Năsăud Land; 17. Almăj Land; 15. Vrancea Land; II. Architecture: 2. Maramureş Land; 4. Lăpuş Land; 10. Moţi Land; III. Symbolistic (historical): 3. Chioar Land, 9. Zărand Land; 11. Haţeg Land; 12. Amlaş Land; 13. Făgăraş Land; IV. Cultural (ethnographic): 6. Dorna Land; 7. Silvania Land; 8. Beiuş Land; 14. Bârsa Land; 16. Loviştea Land; 18. Severin Land

(Source: Cocean, 2012)

Depending on their distinctiveness (Cocean, 2011; Cocean, 2012), distinguishes between four categories of brand specific to ”land” type areas, such as: folk, architectural, symbolic (historical) and cultural (ethnographic) brand. We dare to bring this reasoning forward, by considering that, on a higher integrative level, the term of ”țara” is itself a ”brand”, through the symbol of identity and heritage elements, authenticity and national distinctiveness expressed by its facets (historical, cultural, ethnographic etc.), manifested with various intensities in the 18 areas of this type.

Evidently, the brand implies a message and a logo. The message of the ”land” brands in Romania could be represented by the phrase ” our dowery” (seen as a heritage inherited from the parents and forefathers, as a starting point on the road of building their own future, thus integrating the idea of endurance, authenticity and preservation).

Evidently, the implementation of this model can only be done from the perspective of a ”smart” type of territorial management. For the territorial management, the economic globalization is a challenge that confuses the local economy. The preservation of regional economic activities depends on its adaptability to the new realities. So, the management of the local territorial communities must take into account the efficiency, equity, endurance and territorial creativity criteria. An efficient integrative tool of the territorial management and local policies is the strategy of sustainable local development. The inclusion of the identity elements and the setting-out of the development goals around the capitalization of the local distinctiveness, position the public actors and local communities on their path to assert their competitiveness. The territorial identity can be integrated in all the stages and principles that are necessary to the process of sustainable territorial management. The inclusion of *branding* in the strategy of territorial development gives a higher visibility both internally and externally.

The design of the direction of development through the capitalization of the territorial identity landmarks in briefs of formal and non-formal planning, represents the key to differentiate and, implicitly, to stimulate the territorial appeal. The elaboration of the territorial brand, as an assumed symbol of the combination between identity elements, triggers the increase of the degree of internal community cohesion and, at the same time, the chance for individualization within a global system. Thus, the definition of the identity ”assets”, both material and immaterial, is the foundation for the identity model of local development. The ”land” type areas benefit from a capital of deep *knowledge,* where authentic customs and particular know-how have been preserved. Under this label of authenticity represented by the ”țara” type areas, the local services and products can compete with modern innovative services and products, always having the advantage of uniqueness, authenticity and tradition.

**CONCLUSIONS**

The establishment of the rural areas in the global competition can be activated through the use of tools of ”smart” type territorial management, articulated within an integrated strategy of local development.

We consider that the local development model based on territorial identity and heritage suggested by the present study can represent such a tool, a sustainable ”alternative” to the ”productive” type of development, which cannot be sustained by the less developed rural areas.

Territorial identity and heritage represent main elements, around which we must rethink the entire development of the areas with strong coherence, by sustainably capitalizing the ”motivational capital”, inestimably represented by them.

In order to implement this model in Romania, there are missing a lot of elements, but some are more important: financial and legislative mechanisms to mobilize these identity elements and heritage in the territorial (re)construction, mechanisms to involve the local administration in the increase of local territorial amenity, tools of part-taking and commitment of the local communities to their own future.

We consider that, despite the aforementioned drawbacks, in the present territorial reality of Romania, the ”țara” type areas represent a true ”brand” of the Romanian rural area, which integrates our heritage. The sustainable capitalization of their authenticity, with all its material and immaterial facets, shall contribute to the integration of the Romanian villages into the European space, in compliance with its real potential.

**Aknowlegments**

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# GEODEMOGRAPHIC ASPECTS OF THE REFORMED CULT IN ROMANIA (1930-2011)

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**Abstract:** The Reformed Religion was brought into Transylvania in 1550 and swiftly adopted by a part of the Hungarian nobility and the urban patriciate. In the inter-war period, after the Greater Union of all the Romanian Provinces on December 1, 1918 the Reformed Church had two Episcopates: the Episcopate of Transylvania and 'Piatra Craiului' Episcopate. Major changes in the numerical evolution and territorial distribution of the Reformed Romanian populations were the following: a) a decrease from 710,706 faithful in 1930, to 701,077 in 2002 and to 600,932 in 2011– as a consequence of the general negative natural balance in Romania (ever fewer births) and emigration (mostly after 2007) after the country's adherence to the European Union.; b) changes in the distribution of the Calvinist faithful by habitat, from 21 % in the town area of 1930 to some 53 % in 2002, and 50.5% to-day.

**Key words:** population, Reformed Cult, Romania

* * * * * *

## INTRODUCTION

The Reformed Religion (Calvinism)[1] (1509-1566) accepts only two holy sacraments – Baptism and Communion, refuting the dogma of the actual presence of "Lord Jesus body and blood" in the act of Communion, nor does it accept to invoke the saints, or the Episcopal institution either, etc. Preachers were to be chosen by the faithful and the spiritual leadership of each Calvinist Church was assigned to an elected council.

[1] Influenced by Martin Luther (1483-1546) and his views, Jean Calvin would publish (Basel, 1536) the first edition of his work "Christianae religionis institution". After having been ousted from France for generating religious unrest, Calvin settled in Geneva (Switzerland) and continued being a vigorous preacher.

In Romania, Calvinism was introduced in Transylvania (1550) and adopted right away by a part of the Magyar nobility and the urban patriciate. However, it had to compete with the Lutheran Church. In 1558, Pastor Péter Meliuz Juhárez succeeded in determining the Cluj clergy to adhere to Calvinism, which would shortly be adopted by most of Transylvania's Magyar population. In 1564, at the Synod held in Arad Town, the two Protestant cults finally separated[2] into Calvinist (Reformed) and Lutheran (Evangelical). The Reformed Bishopric of Transylvania was initially located in Arad. The language used in the Divine Service and in administration was Hungarian.

In the inter-war period, the Reformed Church in Romania[3] had two bishoprics: the Bishopric of Transylvania (Episcopal See in Cluj) and the Bishopric of Piatra Craiului (Episcopal See in Oradea). The first diocese was set up in the 16th century, when Protestantism became the dominant religion of the Transylvanian Magyar population, the second diocense, opened in 1920, gathered the faithful from the west of Romania.

**The inter-war Reformed population**

Twelve years after Greater Romania had come into being (1930), Reformed believers (710,706 people, i.e. 3.9% of the country's total population), ranked fourth among the other faiths, and were found mostly in the historical provinces of Transylvania (497,861 persons; 15.5%), Crişana-Maramureş (177,522; 12.8%), Banat (20,937; 2.2%) and Wallachia (10,257; 0.3%). In the other historical provinces, their number did not surpass 1,500 people: 1,402 in Moldavia, 843 in Dobrogea, 727 in Basarabia, 623 in Oltenia and 534 in Bucovina. Other counties with a numerically significant Magyar population are Trei-Scaune (40.6%), Odorhei (37.4%), Mureş (30.3%), Sălaj (24.5%), Cluj (21.7%), Bihor (21.0%), Târnava Mică (16.6%), Satu Mare (15.0%), Turda (14.4%) and Someş (12.8%) (Figure 1). In all of the former Moldavian and Wallachian counties, Calvinists represented under 1% per total inhabitants.

In terms of settlement, 74.7% (530,728) lived in the country-side and 25.3% (179,978) in town. The higher share of town-dwellers than the average in Romania (20.2%) was due to the very great number of Magyar faithful who lived in the central and western parts of this country: Transylvania 79.4% in the country-side (Alba 11,032, Braşov 4,528, Ciuc 1,310, Cluj 43,194, Făgăraş 1,375, Hunedoara 11,014, Mureş 72,108, Odorhei 4,222, Sălaj 78,249, Sibiu 1,699, Someş 23,103, Târnava Mare 6,218, Târnava Mică 21,943, Trei-Scaune 48,091 and Turda 20,210) and 20.6% in town; Crişana-Maramureş 67.7% in the country-side (Arad 15,519, Bihor 75,079, Maramureş 1,370 and Satu Mare 28,120) and 32.3% in town; Banat 64.6% lived in the country-side (Caraş 648, Severin 5,388 and Timiş-Torontal 7,473) and 35.4% in town. With the exception

[2] The obvious distinction between Luther's and Calvin's schools was their position to lithurgical practices and religious feasts. Luther preserved everything from the Roman and Byzantine times which did not contravene to the Holy Scriptures: the altar, candles, paintings and the celebration of major events in Christ's life. Calvin removed anything that was not indicated by the Holy Scriptures, preserving only the great religious feasts: Jesus' Birthday, Palm Sunday, the Resurection, Ascension and Whitsuntide (http://www.ief-aper.ro/index.php?Scurt-istoric-al-Bisericii-Reformate-din-Romania).

[3] In the course of its history, since foundation to the present-day, the Reformed Church in Romania had several denominations: „Evangelico Reformata, vulgo Calviniana", „Helvet Hitvallasu Evangeliumi Reformatus Egyhaz" (Reformed Evaghelical Church of Helvetian Confession), „Reformatus Egyhaz" (Reformed Church) and the Reformed Calvinist Cult.

of Bucovina, where Calvinist villagers represented 78.1%, their proportion in the other historical provinces was reversed: substantially more in town than in the country-side (84,5% in Basarabia, 92,8% in Dobrogea, 74,8% in Moldova, 88,5% in Muntenia şi 74,4% in Oltenia). This happened because the people who had arrived from the Romanian provinces englobed in the Austrian Empire, settled in town.

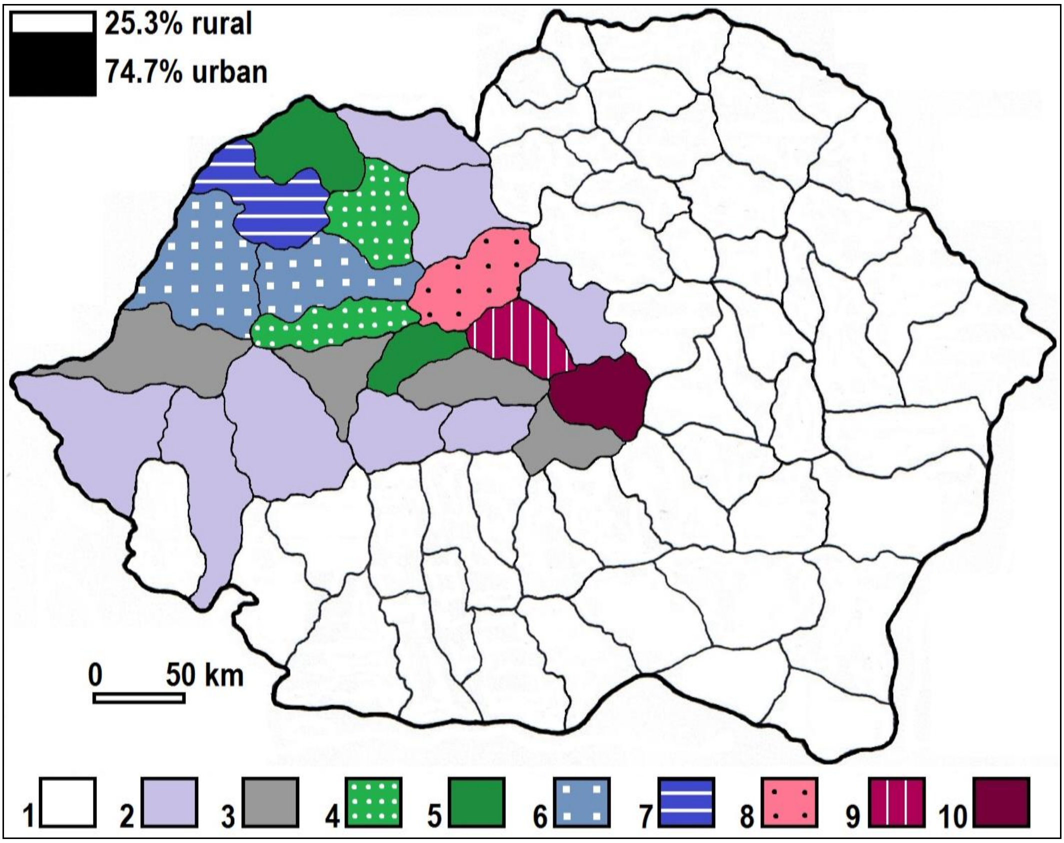


**Figure 1**. The share of the Reformed population in Romania's counties (1930)
1. under 1%; 2. 1-5%; 3. 5-10%; 4. 10-15%; 5. 15-20%;
6. 20-25%; 7. 25-30%; 8. 30-35%; 9. 35-40%; 10. over 40%.

**The Reformed population after World War Two**

The restrictive policy promoted by the communist regime installed in Romania after 1948, limited this cult, so that the Bishopric of Piatra Craiului was dismantled despite the protests lodged by István Sulyók and Károly Nagy, Bishops of Piatra Craiului and Transylvanian, respectively. In their view, the official policy was discriminatory and fascist. However, for all the protests of the Reformed Church in Romania, the greatest part of its patrimony was lost.

The 1992 census returns regarding the confessional situation of the population showed a number of 802,454 Calvinists (3.51% of Romania's population). In terms of the country's religious structure, the Reformed religion ranks third after the Orthodox (ca 87%) and the Roman-Catholic (5%) ones. In 1992, just like in 1930, most Calvinists lived in Transylvania (66.86% total Reformed population in Romania), Crişana-Maramureş (30.06%) and Banat

(2.34%). In terms of numbers and proportion, the situation looked as follows: Mureş 174,616 people (28.62% of the county's inhabitants), Bihor 124,580 (19.50%), Cluj 103,837 (14.10%), Covasna 79,802 (34.21%), Satu Mare 76,614 (19.11%), Sălaj 54,175 (20.30%), Harghita 44,558 (12.79%) and Maramureş 24,654 (4.56%).

The 1992 census data (versus 1930) revealed that 54.6% of the Calvinist population lived in town (percentages similar to those of Romania's urban population). In all the other historical provinces (except for Transylvania (53.42%), the proportion of urban Calvinists was in excess of its average in Romania: Wallachia 89.52%, Dobrogea 88.93%, Moldavia 87.08%, Banat 71.49%, Oltenia 65.71% and Crişana-Maramureş 55.44%. The very high proportion of Calvinist towns- folk in Moldavia and Wallachia comes from the fact that people who, for economic reasons or government assignment, left their traditional regions and settled in town. In this way, the confessional structure was changed; moreover, the urban architecture acquired some new-elements, namely, the religious buildings of this cult.

The ethnical structure of the Reformed population in 1992 reveals 95.37% Magyars, 2.19% Roma, 2.01% Romanians, 0.34% Germans, etc. This explains its high percentage in counties hosting a significant Magyar population (Mureş, Bihor, Cluj, Covasna, Satu Mare, Sălaj, Harghita, etc.).

In 1992, and at present, too, the Reformed faithful in Romania are grouped by the parishes and districts of the two bishoprics: the Bishopric of Transylvania, Episcopal See in Cluj-Napoca and the Bishopric of Piatra Craiului for Crişana region, Episcopal See in Oradea. As established by the Ministry of Culture and the Cults – Department for the Cults, the Bishopric of Transylvania had 16 districts – Aiud, Braşov, Călata (Huedin), Cluj-Exterior, Cluj, Dej, Gurghiu (Reghin), Hunedoara, Mureş, Mureş-Câmpie, Odorheiul Secuiesc, Sfântu Gheorghe, Târnăveni, Târgu Secuiesc, Turda and Baraolt – 506 parishes and 96 philias, with 490 priests; the Bishopric of Piatra Craiului had 9 districts – Bihor, Baia Mare, Satu Mare, Carei, Eriu (Marghita), Arad, Timişoara, Şimleul Silvaniei and Zalău – with 274 perishes and 44 philias served by 260 priests.

The 2002 census returns gave a number of 701,077 Calvinists in Romania, slightly fewer than in 1930 even (710,706), due both to the negative natural increase of Romania's population in general, and to sustained emigration to Hungary and Western Europe of people from the centre and west of this country.

In 2002, the county distribution of Reformed faithful looked as follows: Mureş 157.046 (27.03% from total county population), Bihor 108,769 (18.12%), Cluj 86,811 (12.35%), Covasna 74,312 (33.40%), Satu Mare 68,619 (18.68%), Sălaj 48,452 (19.53%), Harghita 41,269 (12.65%), Maramureş 20,808 (4.07%), Alba 14,805 (3,86%), Braşov 14,489 (2.45%), Bistrița-Năsăud 14,398 (4.61%), Timiş 12,962 (1.91%), Arad 12,359 (2.67%) and Hunedoara 11,466 (2.36%). Elsewhere, they numbered under 100,000 inhabitants. Noteworthy, with the exception of Bucharest city (1,880 persons), Moldavian and Wallachian counties registered rather few Reformed people (under 1,000): Argeş 310, Constanța 287, Prahova 219, Bacău 162, Dolj 157, etc.), with larger numbers in the towns of Târgu Mureş (45,104), Cluj-Napoca (38,779), Oradea (33,800), Sfântu Gheorghe (22,804), Satu Mare (22,475), Odorheiu Secuiesc (11,138), Zalău (9,591), Baia Mare (9,576), Braşov (7,193), Reghin (7,188), Timişoara (6,209), Arad (5,406) and Covasna (5,246).

The recentmost population census (2011) indicated a decrease of Reformed faithful in Romania (600,932 persons, 2.99% of the country's population), as a consequence of the general negative natural balance in Romania (ever fewer births) and emigration (mostly after 2007) after the country's adherence to the European Union.

By comparison to previous censuses, the 2011 one showed highest values of Calvinists in the counties populated by a significant number of Magyar nationals: Mureş 138,129 (25.08%), Bihor 95,250 (16.55%), Cluj 73,660 (10.66%), Covasna 67,791 (32.25%), Satu Mare 60,343 (17.52%), Sălaj 42,128 (18.77%), Harghita 36,760 (11.82%), Maramureş 16,246 (3.39%), Bistrița Năsăud 11,675 (4.08%), Braşov 11,426 (2.08%) and Alba 11,080 (3.24%). In the other counties they are under 10,000, just like in 2002. In the south and south-east of Romania, except for Bucharest Municipium, (1,291 Reformed faithful) they totalled up to 150 persons (Figure 2).

As regards the living milieu, 50.5% (303,475 persons) dwelt in town and 49.5% (297,475 persons) in the country-side (Figure 2). Towns with highest numbers of Reformed faithful are those of 2002, but the values of this category are obviously depleted: Târgu Mureş (36,491), Cluj-Napoca (31,597), Oradea (26,755), Sfântu Gheorghe (19,975), Satu Mare (17,955), Odorheiu Secuiesc (9,678), Zalău (7,449), Baia Mare (6,412), Braşov (5,218), Reghin (5,654), Covasna (4,386), Timişoara (4,159), Arad (3,904).

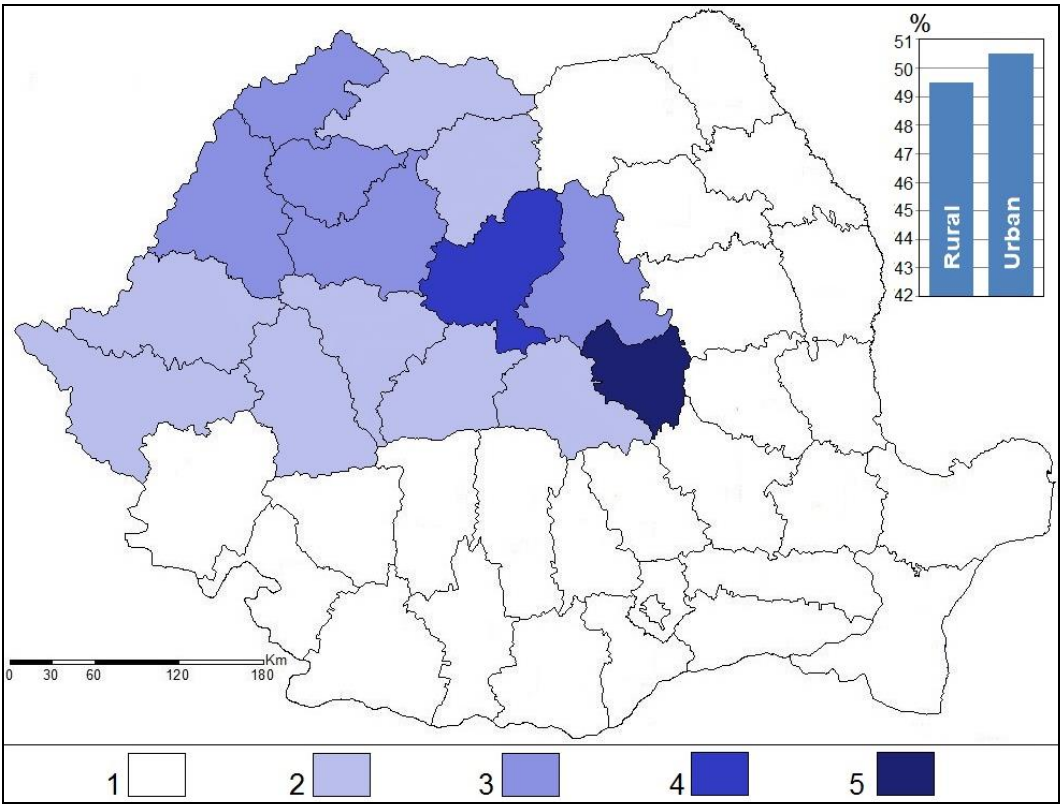


**Figure 2**. Reformed population in Romania's counties (2011)
1. under 1%; 2. 1-10%; 3. 10-20%; 4. 20-30%, 5. over 30%.

As a **conclusion**, the numerical evolution of Romania's Reformed population, consisting mainly of Magyar nationals, had initially an increasing trend, which reversed after 1992, the result of lower birth-rate values and emigration. Just like in the inter-war period, most Calvinists live in the counties of Transylvania (Mureş, Cluj, Covasna, Sălaj and Harghita), Crişana-Maramureş (Bihor, Satu Mare and Maramureş), as well as Banat (Timiş). A change in the living milieu ratio of this population has been noticed within the study interval, namely, within the past few decades most Calvinist's have become townspeople.

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# GEOECONOMICAL PRE-CONDITIONS AND FACTORS OF MARINE POTENTIAL OF UKRAINE FORMATION BEFORE THE CONFLICT OF 2013-2014

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**Abstract:** Geoeconomical pre-conditions and factors of Ukrainian marine potential formation are analyzed. Marine position influence on the naval power of Ukraine is considered. The basic problems of the state marine strategy forming are reflected. The overcoming ways of complicated questions about Ukrainian marine potential formation are investigated.

**Key words:** geoeconomical pre-conditions, marine potential, marine policy, naval power, Ukraine, Black Sea region, energy safety

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## INTRODUCTION

Ukrainian advantageous geopolitical position, its access to the Black and Azov Seas promotes not only favorable conditions for the country development as an active subject of international sea relations but also creates appropriate economic conditions of the country functioning as a marine state. Unresolved issues of Ukrainian marine borders determination and establishment negatively affect the formation of its marine potential, weaken its role and importance in the strategically important Black Sea and Azov region. Therefore, the study of geo-economic conditions and the factors of the Ukraine as a naval power formation will find possible ways to resolve disputes about its marine borders delimitation and demarcation and provide appropriate task of Ukrainian marine policy development.

## THE ANALYSIS OF THE LATEST RESEARCHES OF THE PROBLEM

Such scientists as R. Kruglyakov, M. Kruglyakova, N. Shevtsova (Круглякова Р., Круглякова М., Шевцова Н. Геолого-химическая характеристика естественных проявлений углеводородов в Черном море [Electronic resource]. - Access mode: http://www.nbuv.gov.ua), O. Lyvenj (Ливень О. Перспективы освоения нефтега-зового потенциала украинских акваторий Черного и Азовского морей [Electronic resource]. - Access mode:

http://www.uaenergy. com.ua) and others studied geo-economic conditions and the factors of Ukrainian marine potential development.

O. Lyvenj in the work "Prospects of Ukrainian oil and gas potential development within the Black and Azov Seas" deeply analyzes the energy potential of the Azov and Black Seas and indicates the importance of creating an appropriate state marine policy in relation to its development. Authors R. Kruglyakova, M. Kruglyakova, N. Shevtsova in the book "Geological and chemical characteristics of hydrocarbon natural outcrops in the Black Sea" analyze the factors which influence on the Ukrainian marine potential formation within the Black Sea.

Despite the importance of Ukrainian marine potential formation, this topic has not been sufficiently investigated. There is no complex political-geographical research about Ukraine as a marine state formation. Many problems about appropriate conditions of Ukrainian marine policy formation and the Ukrainian-Russian marine border delimitation still remain unsolved. It is important to note that these problems are investigated mainly on the pages of the periodical press, hence the complex analysis about the factors of Ukrainian marine policy development must be done.

## THE AIM OF THE ARTICLE

The aim of the article is the investigation of the geoeconomical pre-conditions and factors of marine potential of Ukraine formation.

## BASIC TASKS OF THE RESEARCH

Basic tasks, which were solved in the process of research, were the next: to analyze the geoeconomical pre-conditions and factors of Ukrainian marine potential formation; to consider the marine position influence on the naval power of Ukraine; to reflect the basic problems of the state marine strategy forming; to investigate the overcoming ways of problem questions about Ukrainian marine potential formation.

## PRESENTATION OF THE BASIC MATERIAL AND THE RESULTS RECEIVED DURING THE RESEARCH

The Black and Azov Sea region is extremely important for Ukraine because it forms a number of objective reasons for Ukraine's economic development, including the development of its marine potential.

Firstly, the Black Sea region is a natural conjunction between powerful regions of hydrocarbon energy production and consumption. Extractive regions are Russia with its oil and gas deposits, the consumption region is the EU. Growing demands of industrial EU creates conditions for strategic importance of transportation routes of energy resources from East to West across the Black Sea region increasing.

Traditionally, Europe gets hydrocarbons through several communication corridors - connector systems and groups (oil and gas, marine transportation routes, terminals). With the entry of Bulgaria and Romania to the EU, the Union got the entrance to the Black Sea, which promoted the new power connectors development (Копачинська Г. В., 2010).

Connector group combines communications only by geographical principle, they are not connected into the system, as resource providers and consumers are different and form the competition policy.

The most powerful connector system of the EU and Europe is Eastern (Хількевич В. І., 2009), in which the Black Sea-Mediterranean connector is one of the most powerful, it was formed as the main export route for oil from Russia and Kazakhstan with the use of the Black Sea terminals including such Russian terminals as Novorossiysk, Tuapse and Ukrainian terminals such as Odessa, "South".

Ukraine is present in several connectors: Eastern European multiconnector of Eastern connector system (hydrocarbons pipeline supply to the EU through Slovakia), Black Sea-Mediterranean connector: Russian and Kazakh oil transit and transshipment; the Caspian-Black Sea-Central European connector: oil transit and transshipment.

The first two connectors have a monopoly supplier – it is Russia, which exports to the EU as own hydrocarbon resources so also oil and gas from Central Asia. Eastern European multiconnector formed and remained the key connector for gas supply to the EU and oil supply to Central Europe states, forming Eurasia hydrocarbon axis. Ukraine and neighboring Slovakia, Moldova, Romania are on this axis.

On the Eurasia hydrocarbon axis the rivalry between two energy strategies - western (EU) and eastern (Russian) happens. The results largely depend on the side Ukraine joins as the largest transit.

Therefore, the appropriate amount of oil and gas pipeline within the Black Sea is extremely important for energy transit from east to west through the territory of Ukraine. The economic development of our country and its political power, as well as development of its marine potential depends on the available amount and proper functioning of gas and oil pipelines.

Another feature of this region is the NATO and the EU interest in it, what can both promote cooperation among states and enhance the differences among those who are trying to satisfy their ambitions of regional leadership using neighbors. The EU policy in the Black Sea region has a distinct transport and energy content and is based on a number of documents and programs, namely: Brussels Declaration on interregional program of technical assistance TRACECA (1993); program INOGATE; European Neighbourhood Policy; BSS (Black Sea Synergy); Energy Community Treaty in 2005.

It should be noted that the EU policy in the Black Sea region just starts to develop, it is mostly declarative. However, the presence of the EU is extremely important in the region.

The weakened American position in the world policy and on the regional level, particularly in the South Caucasus and the Caspian Sea has the negative impact in the region. In fact, Iranian problem is the main reason of the U.S. presence in the region. In the region the USA plans cause a severe reaction of Russia. The very same Russia after the five-day war in August 2008, and the agreement with Ukraine in 2010 to extend the Black Sea Fleet until 2042, goes on to build up naval capabilities in the Black Sea basin.

In fact, American and Russian military plans provoke the Black Sea region militarization, where the hydrocarbon transit increases, terminal and pipeline infrastructure expands, oil and gas exploration and production projects develope, what negatively influence its development.

Thirdly, because of experienced European gas crisis in 2006 and in 2009 a global "hunt for energy" began. Such countries as Turkey, Bulgaria, Romania, Georgia, Ukraine and the Russian Federation began the attempt to activate the development of marine shelf.

Ukraine, like Romania, is a pioneer in the Black Sea shelf exploration and development, for what in 1979 specialized enterprise "Chornomornaftogaz" was created (http://www.uaenergy. com.ua). Total initial recoverable hydrocarbon resources of the Ukrainian sector areas of the Black and Azov Seas count up to 2.324 billion tons of conventional fuel. In particular, in the northwest shelf of the Black Sea eight gas and condensate deposits (Golitsyn, South Golitsyn, Storm, Archangel, Schmidt, Crimea, Odessa, Unnamed) are opened. There are 17 deposits, including 11 gas, four condensate and two oil on balance of "Chornomornaftogaz". In the waters of the Black and Azov Seas there are 37 objects prepared for deep drilling, 58 revealed promising deposits, 87 project deposits.

It should be noted that attempts to establish international cooperation within this region were unsuccessful. At the beginning of the 2000th Austrian OMV had serious intentions to cooperate with "Chornomornaftohaz." But in 2004 it finally re-oriented to Romania. The attempt to attract offshore American companies was also failure. The right to participate in the shelf development got Vanco Energy, for work in Ukraine "Vanco Prykerchenska" was created. But with the change of government the arrival of serious partners in the development of the Ukrainian sector of the shelf slowed. Another change in the ruling power in 2010 led to a reorientation of partnership with Russian companies, which are politically motivated and have no serious prospects, since neither Gazprom or Lukoil, which signed a Memorandum are not leaders in offshore developments. In contrast, in those rare offshore projects in Russia, where they appear, partnerships with Western companies are used.

It can be predicted that the further discovery of hydrocarbon reserves will make the Black Sea shelf in the medium term (5-10 years) one of the alternative sources of energy supplies in the region. Hardly by offshore production, the countries of the region can fully provide their needs in oil and gas, but the existence of domestic energy production in the national energy balance will play a positive role in enhancing their energy security.

Fourthly, the important problem of the Black Sea region is energy transportation. Since the 1990 th the Black Sea, is the scene of several competing pipeline projects rivalry. Today, the main competitors are projects initiated or supported by the EU, on the one hand, and Russia - on the other. EU promotes the Southern Gas Corridor, designed for all potential gas flows, which may be obtained and transported through Turkey to Europe and gas supplies from Azerbaijan, Turkmenistan, Iran and Iraq. Projects in the Southern Gas Corridor are the next: Nabucco, Interconnector Turkey-Greece-Italy (ITGI), connected with the Trans-Adriatic Pipeline (TAP), «White Stream", Trans-Caspian gas pipeline, as well as Iranian and Iraqi connectors for gas supplies to Europe (http://www.cisoilgas.com/article/Black-gold-of-the-Black-Sea).

Nabucco should be considered the base project of the Southern Gas Corridor as the most advanced and prepared to implementation. Nabucco was founded in 2004 and had serious preparatory and organizational work. One important factor in favor of the project is fairly consistent support from the European Commission. Today it mobilized all efforts to support Nabucco, which had become a pilot project of the European Commission developed the concept of unified EU energy policy.

"White Stream» is often wrongly considered as competing with Nabucco. In fact, it is complementary, unique northwestern branch of Nabucco. Because of the uncertain position of Ukraine this project in the Ukrainian direction is essentially frozen. International company White Stream Pipeline Co. reoriented project to Romania. This means the greatest extent of sea pipeline (1105 km) compared to the "South Stream" (900 km) or the "Blue Stream-2" (444 km), the maximum depth making pipes (2 km) and, accordingly, worsening profitability of the project and further its unclear perspectives.

Nabucco destroys Russian strategy aimed to establish a mechanism of transnational areas, flows and prices of exported gas manipulation. If Gazprom owns "Nord Stream" and "South Stream", as well as control over Ukraine's GTS – it will get the ideal system for the pan-European gas manipulation. Nabucco, which isn't controlled by Gazprom, having access to the Austrian Xabi provides a high competition level. Probably Gazprom resource will be non-competitive, because of highly maximized export prices. Delivery by Nabucco of Azerbaijani, Turkmen or other gas will provide for European customers the possibility to play by the rules not of Gazprom but competitive market. Therefore, the external resistance of Russia is to prevent the implementation of Nabucco, even if neutral valuation is declared.

In this context, there is a risk that the pipeline route, which ensures the supply of resources for Nabucco, will pass through very unstable area in Southern Caucasus (Azerbaijan and Georgia), where serious frozen conflicts are, which are known to have the ability to be "suddenly defrosted". This increases the political risks of the Southern Gas Corridor. The events of August 2008 awitnessed it.

The major threat not only to the Southern Gas Corridor but to the stability in the Black Sea region is the factor of hidden external opposition to Russia. There was also equally fierce competition about the oil and gas transportation in the region. Russia had made efforts to establish control over Kazakh oil transportation route "Tengiz-Novorossiysk" actually winning control on this route, and intended together with American and Kazakh shareholders to expand route capacity to project (67 million tons of oil / year) . However, there is the problem that thee Black Sea straits are already overwhelmed by oil traffic. Russia in 1992 lobbied for the project Burgas-Alexandroupolis, which had to solve the problem of the Straits. Only in 2007 final agreement among Russia, Bulgaria and Greece was reached.

However, Turkey active position, which tried not only to solve this problem, but to close oil transit on its territory slowed the project realization. Moreover Russia tried to implement the project of gas pipeline "South Stream" passing the exclusive maritime economic zone of Ukraine in the Black Sea, which required the Turkey consent. Therefore, the Turkish side has offered Russia to participate in the Trans-Turkish pipeline project Samsun (Black Sea coast) - Djeyhan (Mediterranean coast), initiated by Ankara together with the Italian company ENI.

Fifthly, Ukraine's strategy in the region is uncertain and unused until the end. None of the strategic opportunities which the access to the sea openes such as the increase of domestic energy production and diversification of hydrocarbons supply has not been used for 20 years. The only exception is the construction of the terminal "South" and the Odessa-Brody pipeline, which by mid-2010 were used for the exact opposite purpose such as the transit of Russian but not Caspian oil instead. Hence, Ukraine watched the Russian activity of the by pass projects implementation, which reduced the volume of oil transit through Ukrainian territory (http://www.cisoilgas.com/article/Black-gold-of-the-Black-Sea).

The Russian right as the owner of energy is the implementation of any export policy, but this policy has challenges to energy security of Ukraine. In particular, with the commissioning of the BPS-2 in 2012, the volume of oil pipeline transit by Ukrainian Oil Transportation System, which is minimal nowadays will be reduced.

Moreover, in the volume of oil transit in 2010 (20.1 million tons) 16.9 million tonnes were transited by the pipeline "Druzhba" to the Central Europe, and only 3.2 million tons were transited by the ukrainian Black Sea oil terminals.

Analysis of the 2000-2010 dynamics indicates the futility of Ukraine's attempts to keep Russian oil transit using various admitions, including strategic (reverse use of the Odessa-Brody), because Russia steadily and consistently minimizes dependence on transit countries, regardless of their degree of loyalty and political and economic attachment.

However, this dynamic is a confirmation of the strategic mistakes of the Government of Ukraine in 2004, when it agreed the reverse use of the Odessa-Brody as the necessary measure. The result was that the transit oil volumes had not increased, but promising oil flows from the Caspian Sea region passed Ukraine. The trend about Russian oil transit through Ukraine reduction will continue in the future.

Another trend which causes concern is associated with increased activity in the hydrocarbon deposits production in the Black Sea in general and in particular on the Ukrainian shelf. Gas production in the Ukrainian shelf counts 1.16 billion with opportunity to develop it just to 1.2 billion meters the reason of it is in the lack of resources and the lack of deepwater production technologies in the national operators. The situation would be improved with the serious foreign companies appearance in Ukraine, just as it was in Turkey or Romania. It really can be done nowadays.

Also, the appearance of Russian companies in offshore developments around the Crimean peninsula will promote political encroachments on the Crimea. However, the risks associated with the Black Sea Fleet location in Sevastopol and others, reduce the attractiveness of Ukraine as a partner in the energy projects implementation. One of the examples is the reorientation of the "White Stream", which was to go through the Crimean peninsula to the connection with Ukraine's HPS, what made gas supply to the CEE impossible. However, the operating company directed pipeline route to Romania the reason was the permanent political uncertainty of Ukraine, and also Russian political and economic influences on the Crimea.

Joint economic activity in the Black Sea involving Russian companies, memoranda on which were signed in 2010 and early 2011, will work in favor of Russia, as Russia will continue to delay maritime borders delimitation, keeping the status quo of uncertainty. Overall, this strategy will strengthen Russian control in the Black Sea region.

## THE CONCLUSIONS AND THE PROSPECTS OF THE FURTHER RESEARCHES

Azov and Black Sea regions are extremely important for Ukraine as a marine state formation and functioning as this region provides economic strategic competitive advantages of the state. However, inappropriate government policies, lack of clearly defined state marine boundary and the Ukrainian conflict of 2013-2014 weaken the power of Ukraine as a participant of international marine relations and prevents its functioning as a marine state within the Azov and Black Sea region.

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# SOVIET HERITAGE AT THE ROMANIAN-UKRAINIAN BORDERLAND IN POST-SOCIALIST MARAMUREŞ LAND

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**Abstract:** Maramureş Land unitary space until 1920, but fragmented in the interwar period, with a North part in Czechoslovakia and a South part in Romania but permeable under goods and people circulation, became, once with the installation after the Second World War of the USSR on the North side of Tisa river, a sectioned one by a closed border. Although Ukraine was an independent state affiliated to ONU since 1945, it remained until 1990 as a component part of USSR. The Union presence in the border crossing area was realized through building but also destruction of some cultural or economic edifices. In this paper, we will analyze the *soviet inheritance* on one hand, with its icon constructions (railway, bridges, monuments), and on the other hand through the destruction of some icon territorial systems from pre-soviet period. Everything is reflected in what remained preserved, degraded, or (re)built in the Romanian area after the fall of the socialist system in 1990.

**Key words:** USSR, Ukraina, Romania, Maramureş Land, Romanian-Ukrainian border, soviet heritage

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## INTRODUCTION

For the Maramureş Land, the 20$^{th}$ Century remains marked by profound structural and political mutations, pointed out through a new territorial design. For that matter, a continuum historical space, known under the name of Maramureş Land and geographically identified with the depressional space limited by representative mountain unities (Oaş-Gutâi-Ţibleş, Rodna on West and South, Maramureş on East and Ukrainian Charpathians on North, consequence of the first global conflagration, was fragmented on the East-West direction by a new political border, the Romanian-Czechoslovakian one (Figure 1). Although politically speaking there were two territorial systems connected on North and South by Tisa river (Ilieş and all., 2012), the circulation of goods and people had the same rhythm and way, situation facilitated by the 8 bridges (3 railways and 5 roads) that connected the two Tisa shores, but also by the ethnic structure of the population on both sides of the river, favorable in this situation. The Second World War brought for the first time as a neighbor on the North side of Tisa river USSR, as a super state over Ukraine (independent state affiliated to ONU from 1945). The border gradually closed, becoming a hermetic and with no border crossing traffic. Barbed wire, plough border area and extremely visible and strong military guard replaced the formalism of the Romanian-Czechoslovakian border. Nevertheless, the soviet benefited from "their socialist political system" and marked their territory through a serial of specific edifices: the railway with broad-gauge between the localities Valea Vişeului and Câmpulung la Tisa (figure 1); the railway bridge between Câmpulung la Tisa and Teresva (figure 7); the border crossing point in Halmeu for the mining in Băiţa Bihor and other war debts that Romania was obliged to pay to the USSR; the soviet hero cemetery in Sighetu Marmaţiei (figure 5) and other Romanian cities, soviet monuments etc. On the opposite side we remember the gradual destruction of some symbols between the two sides of the Tisa River, like the 8 bridges (figures 3 and 8). Some of them were destroyed by Romania in1968 in order to prevent a USSR invasion, similar to the one in Czechoslovakia, because of the Romania's opposition actions to USSR and its Warsaw Pact alliances from that year.

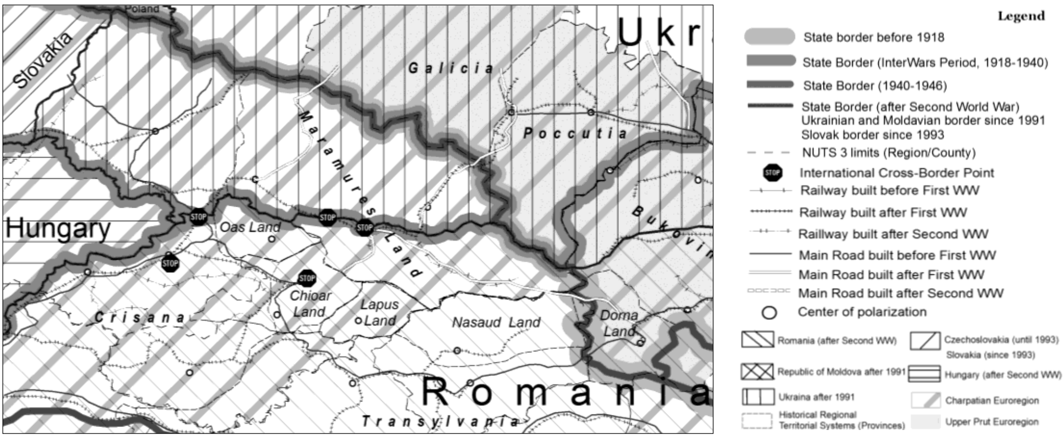


**Figure 1**. Borders, historical regions, euroregions and political territorial systems during the last Century (1916-2014) in the area of actual (2014) Romanian-Ukrainian border and borderlands
(Ilieş & Wendt, 2014, 297); (data sources: Rey *et al.*, 2002, p. 17; Ilieş, 2007; Ştefănescu *et al.*, 2007a, p. 115-116; Ştefănescu *et al.*, 2007b, 119-120; Smolyoi, 2007, p. 22; Kocsis, 2007, p. 29; Hajdu, 2009, p. 23)

**THOOLS AND METHODOLOGY**

Another analysis in the border area is represented by a suitable approach in order to reach the objectives proposed in the study. The instruments and specific methodology used in a political geographical study with an inter-subject approach, are exploited in the specific literature of spatial nature with regional impact (Foucher, 1991; Kleinschmager, 1993; Short, 1993; Glassner, 1995; Bodocan, 1997; Stamate, 1997; Ilieş, 2004; Popa, 2006; Ilieş, G., 2007; Ilieş & Grama, 2010a; Ilieş et all., 2012), territorial planning (Cunha, 1998; Ianoş, 2000, Ilieş and all, 2011a; 2011b); and territorial order (Boar, 2005; Johnson et all, 2011) but also geopolitical and geostrategic (Wendt, 2003; Neguț et all, 2004; Bufon & Ilieş, 2011), historical approach (Mihaly de Apşa,1900; Filipaşcu, 2002; Boar, 2005 etc) represent arguments in favor of a believable scientific approach on one side and social utility on the other side. From several studies based on borderline (Bodocan, 1997; Ilieş, 2003, 2004; Boar, 2005; Popa, 2006; Ilieş D., 2008; Violante & Vitale, 2010; Ilieş et all., 2011; 2011a; 2012; Ilieş & Wendt, 2014), or on borderline domain and especially on the meaning of borderline systems and functions (Ilieş M. et all., 2010; Ilieş & Vlad, 2014), there are only a few research directions that operate with a big variety of instruments and analysis methods.

## DISCUSSIONS AND RESULTS

Over the 20th Century the Romanian-Soviet continuity, especially the inclusion of Romania in the socialist space over lapses the period of 1948-1989. Until the Second World War, Romania's North neighbor in the Maramureş sector was Czechoslovakia (Figure 1; Boar, 2005; Ilieş et all., 2012; Ilieş & Wendt, 2014; Ilieş & Vlad, 2014), and beginning with 1991 (August) through attainment of independence, Ukraine becomes again a de facto neighbor to Romania. It is worth mentioned that once with the fall of socialist system in 1989, the period to the Ukraine's independence in 1991, USSR's place was taken by the The Commonwealth of Independent States (CSI).

For that matter, the first Romanian contact in space with USSR takes place after the beginning of the Second World War through the occupation of Galicia, thus reaching in the East vicinity of Maramureş Land (Boar, 2005, 239). The profound contact inherited till present day happened on 28 of January 1946, when*"The Independent Sub-Carpathian Ukraine*" is transformed into Zakarphatia Region and incorporated to S.S.R. Ukraine as part of USSR (Boar, 2005, 241). The Soviet inheritance can have a historical dimension through facts and a geographical one through territorial realities. These two dimensions reflected by the approach ways of this study, show: elements "enlighten" in the socialist period and with a dominant soviet fingerprint; elements from Maramureş enlighten in the pre-soviet period, and that the socialist period brought them to ruin or destruction as consequence of USSR's actions.

### Elements from Maramureş destroyed as a result of soviet neighboring

Most of these elements include buildings that during the socialist administration began to degrade or have been destroyed, being connected to the neighboring link and USSR's actions. In the same time, there were build other buildings whose utility served only the USSR. An important category is represented by the connection bridges between the two sides of Tisa River, the so called historical bridges.

***a.) The historical bridges***. The eight *historical bridges* over the Tisa River (3 railways and 5 roads) ensured until the Second World War the "historical" link between the two shores, previously mentioned in the Maramureş Land space, even though in the interwar period the North political vicinity was the same with Czechoslovakia. Over a 60 km long (Stamate, 1997), corresponding with the hydrographical support mentioned and established after the First World War (1920), according to figure 2, we established no less than 18 double settlements, generated by a political border, placed ”face to face” on both sides of Tisa River.

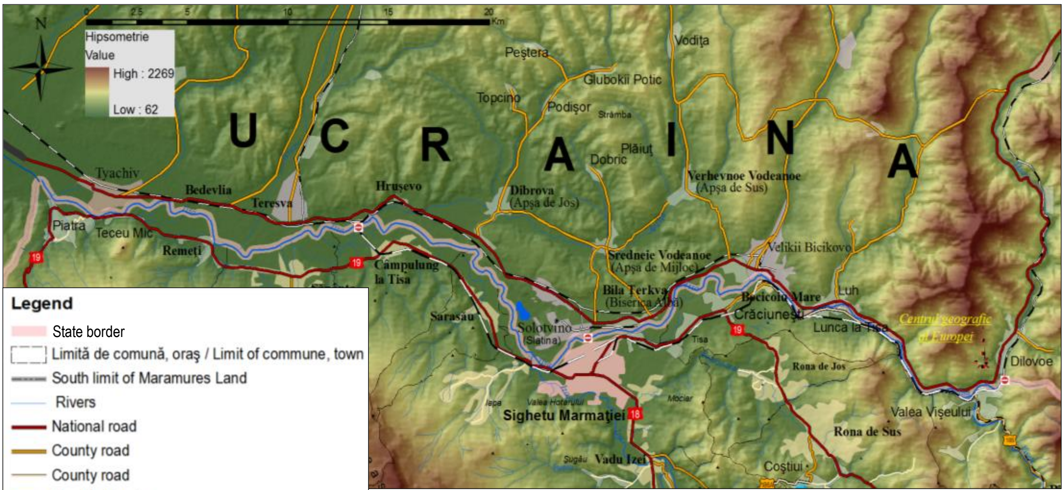


**Figure 2**. Tisa Valley. Romanian-Ukrainain borderland

Moreover, a part of these, until the establishment of the border line, were identified as a single settlement (Figure 2): Teceu Mic (ROU)/Tiachiv (UA); Remeți/ Bedevlia, Săpânța /Teresva, Câmpulung la Tisa/Hruşevo, Sighetu Marmației/Solotvino (Slatina); Sighet (Cămara)/ Bila Țerkva (Biserica Albă); Lunca la Tisa/Luh; Bocicoiu Mare/Velikii Bicikiv, Valea Vişeului/Khmeliv/Dilove. The intern systemic functionality over the Tisa River was assured by the eight bridges mentioned above.

1.) A *first consequence of Soviet neighboring was the split of functional relations between the localities set on both sides of Tisa River, once with the inclusion of Transcarpathian Ukraine into USSR, and the transformation of the border from an opened one into a closed one.*

Although some bridges continued to exist after 1945 but unfunctional, through a hermetic closed border, some other bridges were destroyed in 1968, dynamited by the Romanian administration. It happened as a result of USSR’s threatens to invade Romania, because of Romania’s refuse to join the Warsaw Pact Alliances to the Czechoslovakia’s invasion. The only *material inheritance* that remained, is a half of a bridge in Teceu Mic (Figure 3), situated on the Ukrainian side on present day (ex-Soviet). A second proof is the Ukrainian part of the bridge in Camara Sighet, moved by the Ukrainian administration in 2003 on the *new historical bridge* (down river from the original place) and included in it (Figure 8). Other bridges can only be identified by their pillars or parts of pillars that certify their existence, for example the one in Lunca la Tisa and two others (railway and road) in Bocicoiu Mare.

**Figure 3**. Rest of *Historical Bridge* over Tisa between Tiacev (Ukraina) and Teceu Mic (Romania) destroyed after The Second World War

**Vicarious/restructured elements as a result of Soviet neighboring**

***b.) Railway.*** In the unitary period of Maramureş Land, placed under Austro-Hungarian administration, the Tisa River Valley was also an important circulation axis on the West-East, and the trans-Carpathian connection towards South, was done only by roads and cols. Regarding the railway, the first one built under Austro-Hungarian administration, was in 1972 (Boar, 2005, 212), on route from Khust towards Sighet with ramification at Valea Vişeului (from 1894; Figure 2) from where a line continued along the Vişeu River, an tributary to Tisa River towards Borşa, built in 1913, and another one towards North, on Tisa Valley through Iasinia, with connection over the Ukrainian Carpathians towards Galicia and Bukovina. To these are added the narrow railways (mainly forest ones, built from 1883) that connected Sighet with the salt mining in Coştiui, Ocna Șugatag and, the forest area of Igniş-Gutâi Mountains up to the present day resort, named Izvoare. The first connection of the Romanian Maramureş railway (Sighet-Borşa) with the one in Transylvania, was made in the years that followed the Second World War, the 50's, (Pop, 1984) through the building of Salva-Vişeu section.

2.) *Another consequence of the soviet neighboring through a hermetic border is represented by the severance of the Tisa railway axis from Maramureş Land on the Câmpulung la Tisa-Valea Vişeului-Borşa, that determined the built of Salva-Vişeu railway line.*

3.) *The third consequence with positive effects was the connection of the remaining railway sector in Transylvania, between the years 1946-1950, but with enormous spending and even human life loss, on one of the most difficult sites of that time (Salva-Vişeu).*

***c.) The roads.*** In the same situation with the railways, the closing of the border with USSR, determined the amputation of the connections that ensured the 5 bridges and the reorientation of traffic from a transversal to a parallel one in relation to Tisa River (figure 2). In the new political-territorial design, the relations of Romanian historical Maramureş with the surrounding areas was realized exclusively through altitude and cols: Huta col towards West, towards Oaş Land Gutâi col, Rotunda and Setref towards South, to Transylvania; and Prislop col (1416 m) towards East, to Bukovina.

4.) *The new hermetic border over Tisa determined a reorganization of the communication system towards the interior of every border subsystem (Ilieş et al, 2012) through sectioning and blocking of the transversal connections over Tisa.*

***d.) The creation of face to face localities.*** Regarding this, we mention the fact that until the establishment of the border with Czechoslovakia in 1920, there were localities whose administrative territory developed on both sides of the Tisa River (Teceu, Bocicoiu Mare, Sighet and Lunca). If in the between wars period there appeared for the first time under administrative level the double localities, after the installation of soviet system, these became de facto parallel territorial systems, with no functional links (figure 2) and almost identical names. All these had an effect on the inter-human relations and the economic status of the population.

5.) *Another consequence is due to the consolidated division and restructure of some unitary and functional territorial systems, kind of localities through internal organization under double localities, with no functional connections and a separate and divergent evolution, under flux orientation and collaboration relations (Ilieş et all, 2012).*

***e.) The role of impenetrable barrier with a dominant function of human flux control*** (no border crossing points***) and the military state border.*** Thus, it appeared parallel communication and transport systems, *back to back* and no functional links (Boar, 2005, p.213).

**Soviet elements inherited in the Romanian space**

***f.) Remembrance elements.*** In this category, we could include the soviet soldier's graveyard in Sighetu Marmației, set presently in a very good preservation and maintenance (Figure 5A). These were built in 1944-1954 to sign of respect for the soviet army that crossed the Maramureş territory in the Second World War. On others monuments are in the center of the city were, till 1990, was a red star who was replace with white cross (Figure 5B).


**Figure 5**. Sighetu Marmației. The Soviet Monument cemetery (A) and Monument (former Soviet) from the center of the city (B)

6.) *This monument cemetery points* (Figure 5A) *out Romania's respect over the soviet soldiers fallen in the Second World War, in Maramureş area.*

***g.) Broad-gauge railway.*** Because of the inadequate relief conditions to built on the right side of Tisa River, between Soltvino/Slatina and Dilove, after the Second World War, USSR built a railway under soviet norms (large: 1520 mm) and used only for the soviet trains, using the route existing in the Austro-Hungarian period. So, we consider that this is the only place in Romania, where on the same embankment are two types of railway: an old one with European gauge and the soviet type with big gauge. Only the Câmpulung la Tisa-Teresva sector is exclusively with soviet type line (Figure 6). This railway ensured the connection of that on the USSR's territory between Teresva to vest and Dilove to East (Figure 2). Through the building of this railway on the Romanian side, according to international legislation but also, through the leader of the socialist world position that USSR had, Romania commissioned a part of its territorial sovereignty to USSR through the rights of utility and transit of this railway and means of transportation on Romanian territory. It was exclusively built for merchandise transportation. After 1990, after Ukraine's independence and reopening of people's transit, gradually this railway was used mainly by a Ukrainian train (Figure 6), for people transportation and connected the localities Tiaciv-Câmpulung la Tisa-Sighetu Marmației-Valea Vişeului-Rahiv (Figure 2). The increase of border crossing criminality (smuggling of cigarettes especially) determined the Ukrainians in 2007 to suspend this route. Today, the railway is unexploited, abandoned (no current maintenance). With all this, taking into consideration the fact that the border with Ukraine is an external EU and NATO one, Romania undertook a serial of works regarding the protection of the railway (Figure 6), including reconstruction works after the flooding in 2000.

7.) *The railway with big wheelbase is an important objective of the Soviet inheritance in the Romanian area and could be rehabilitated and used with success as a new touristic landmark in the ex-Soviet space*

**Figure 6**. Large railway (ex-Soviet and Ukrainian) on the Romanian territory and Ukrainian train

***h.) Iron Railway Bridge from Câmpulung Tisa-Teresva*** (Figure 7). Is an economical building, built in 1872 (Horvath & Kubinsky) and survived the socialist period due to its extremely important role in ensuring the connection of the soviet railway line on the right side of Tisa. This bridge played an important role in the reopening of border crossing after 1990 through the opening in 1992 of the first pedestrian Romanian-Ukrainian border crossing point in the Maramureş space, for the small traffic and resident's people access.

**Figure 7**. Iron Bridge over Tisa between Câmpulung la Tisa (Romania) and Teresva (Ukraina)

***i.) The historical wooden bridge between Sighet and Solotvino (Slatina)***, (Figure 8). Is in fact a building enlighten after the fall of the socialist system, (building started after 1999) that tie the historical communication connections in this area. It is remembered in this study because of its delocalization and insertion in its structure, by the Ukrainian side, of two segments from the old historical bridge in the soviet period and located in Cămara Sighet-Bila Țerkva (figure 8).

**Figure 8**. Historical bridge over Tisa between Sighetu Marmației and Solotvino. The metal part is part of old *historical bridge* between Sighetu Marmației (Cămara Sighet) and Bila Țerkva/Biserica Albă (Ukraina), destroyed after The II$^{nd}$ World War.

**CONCLUSIONS**

This study brings out two categories of elements that remind and identify with the soviet inheritance which put its fingerprint in the Maramureş space over a period of 45 years. The first category shows infrastructure elements that ensured in the pre soviet period the functionality of Maramureş Land, and disappeared gradually in the socialist period as a consequence of some USSR's activity. We remember here the destruction of the bridges, the tear of road and railway connections over Tisa, the consolidation and the functional reorientation of double localities connections. The second category include USSR's fingerprint-elements in the Romanian space, like railways with big wheelbase between the localities Câmpulung la Tisa and Valea Vişeului, the railway bridge in Câmpulung la Tisa/Teresva, maintained and reconstructed in USSR's gain, soviet heroes graveyard in Sighetu Marmației. All this elements, many of them included in the collective memory of population can be part of a border crossing regional development strategy, through inclusion in the touristic circuit of Maramureş Land. According to field literature, the railway sector in Câmpulung la Tisa-Sighetu Marmației-Valea Vişeului is the only ex-soviet European space with two types of railway on the same embankment. For the Maramureş space, this economic objective deserved to be transformed in one with touristic functionality. Even if there are moments, benchmark or buildings that remind us of a less glamorous time for Maramureş Land, and in present, these could play a double role: the historical one in order not to repeat the mistakes of the past; the contemporary one that includes the historical inheritance in knowing under objectives form and touristic activities.

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# TRAINING TEACHERS AND STUDENTS OF THE UNIVERSITY OF ORADEA IN EUROPE - A REGIONAL PERSPECTIVE AREA

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**Abstract:** Training specialists in various areas can contribute substantially to the economic development as they are able to help the community in identifying and solving problems more effectively, thereby achieving a more inclusive society. In Romania, the employment policy, namely the education and the professional training require a better level of education in order to train specialists for every socio-economic, cultural and political area. In this regard, the University of Oradea's main objective is to train specialists in various fields, participating in European partnerships with European universities. The participation of teachers and students in international mobility programs with European universities gives them the chance to discover Europe, to understand the visited region and to learn about the national peculiarities of each host country through a comparative approach that also leads to a better understanding of the higher education system both from Romania and from other European countries.

**Key words:** University of Oradea, teachers, students, international mobility,

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## INTRODUCTION

Universities, as higher education institutions, had and still have an important role in any society. Under their wings intellectual elites were formed and knowledge developed in order to contribute to the explanation and understanding of the human being and all its surroundings (Vințanu, 2001).

In order to confirm its position, every university is assigned complex tasks: to train specialists in all sectors of activity and also involve them in the multilateral development of our society. This is the reason why this institution must be highly responsive to changes appeared in the economic, social and political development of a country (Ianoş, 2010).

International exchanges and projects constitute an essential component of the scientific and didactic manifestation of every university that considers itself worthy of respect and affirmation at an international level. The purpose of these international partnerships is to improve one's own educational and research performance (Vladimirescu and Otovescu, 2007). The structure of the international relations at a university must continually expand each year in order to allow the participation of a large number of teachers and students in the planning of international mobilities.

The University of Oradea is one of the most prestigious institutions of higher education from Romania. Its main mission is to train specialists that can be active in almost every socio-economic, cultural and political field. The university encourages the participation in European programs and in collaborative projects with universities from Europe in order to enhance the knowledge and experience of the involved teachers and students. Therefore, a very important aspect of the educational activities held by the university from Oradea is represented by the international relationships, constantly consolidated and developed through the participation of professor and students in various international mobilities. Thus, during 2008-2013, different teachers participated in mobilities focused on professional training and teaching methods while the students participated in study and placement mobilities. Their participation in the international mobilities envisions the training of specialists for the fields in which they were prepared but also in other related fields. At the same time, the development of such projects in different European universities offered teachers and students a chance to familiarize with the system of higher education in Europe and to understand the national peculiarities of each host country.

## METHODOLOGY

The results of this study were obtained by using geographical research methods: the method of bibliographic documentation (Cocean, 2005; Armaş, 2006), the statistical method (Khan, 1998; Petrea, 2005; Gomez and Jones, 2010;) used for processing data statistics on the number of teachers and students participating in international mobilities – the obtained data and information was then included in the profile analysis (Cocean 2005, Clifford et al., 2010), the mapping method – transforming the obtained information in cartographic representations using the GIS software (Petrea, 2005; Cope and Sarah Elwood, 2009) and the synthesis method that resulted in drawing conclusions on the international mobility during the above mentioned period. Moreover, an important role in setting the database was held by the Department of International Relations at the University of Oradea.

## INTERNATIONAL MOBILITY

Erasmus is part of the European program SOCRATES, a program that aims at helping and encouraging the academic mobility, both for teachers and students. This program aims at creating a European identity and unity through study trips from one country to another. These trips are simply forming students-students, students-teachers, teachers-teachers and teachers-students bonds and also offer students and teachers the opportunity to speak another language, to see new landscapes and to prepare for their profession in a different country with different history, culture, customs and social structure (Apetrei, 2010;). In other words, this program seeks access to a global education for as many students and teachers as possible, thus promoting the right to education.

There is a strong consensus that the international mobility of teachers and students is very beneficial for a number of reasons: professional development, a new perspective on the education system of another country and access to various jobs in Europe (Goetz et al, 2011; Guruz et al, 2011; Ennew and Greenaway, 2012; Rizvi, 2014).

During 2008-2013, through the ERASMUS program the University of Oradea focused on the development of international relations with various universities in Europe. The teachers participated in mobilities focused on professional training and teaching methods while the students participated in study and placement mobilities. The statistical analysis of the mobilities undertaken by teachers shows that a particular interest was expressed by the teachers in the field of International Relations and European Studies as they participated in training mobilities (14.2% of the teachers participating in training mobilities) and in teaching mobilities (16.2%). The following places were taken by the teachers in the fields of geography, language and literature (12.6%), Industrial Engineering (9.4%), Physical Education and Sport (4.9%), History, Economics and International Business (Figures 1, 2).

These mobilities were achieved both for the field in which the participants were mainly training but also for related areas (figures 3, 4). In terms of professional training mobility stood the History and Archaeology (16.1% of the participating teachers) while in the case of teaching methods mobility the preferences focused on Earth Sciences (13.2 % of the participating teachers).

The mobilities focused on professional trainings and teaching methods took place in various countries but a large part of the teachers chose Hungary because of the accessible language and because of the fields in which they were trained. They therefore chose various institutions from this country in order to participate in two types of mobilities (Figures 5, 6).

The students attending the license and master degree courses from the University of Oradea participated in study and placement mobilities in universities from Europe (figures 7 and 8). During the above mentioned period a number of 579 students, participated in study stages, most of the students getting prepared for the fields International Relations and European Studies (13%) and Geography (10.8%).

Moreover, the students from the International Relations and European Studies department showed a particular interest for the placement mobilities (figure 8).

These mobilities covered not only the fields in which the students were already preparing for but they also included additional fields. The field in which the students were most interested in during their study mobility period was Modern Languages (7,5%). On the other side, the students participating in placement mobilities showed interest in the Political Sciences and Civic education fields (21,1%) (figures 9, 10).

In what concerns the student's preferences for the host country during their study and placement mobilities, a large percentage is held by France (22% of the total number of students participating in study mobilities) and Spain (40,4% of the total number of students participating in s placement mobilities). The following preferred countries were: Finland, Germany, Greece, Italy, Great Britain, Portugal, etc. (figures 11, 12).

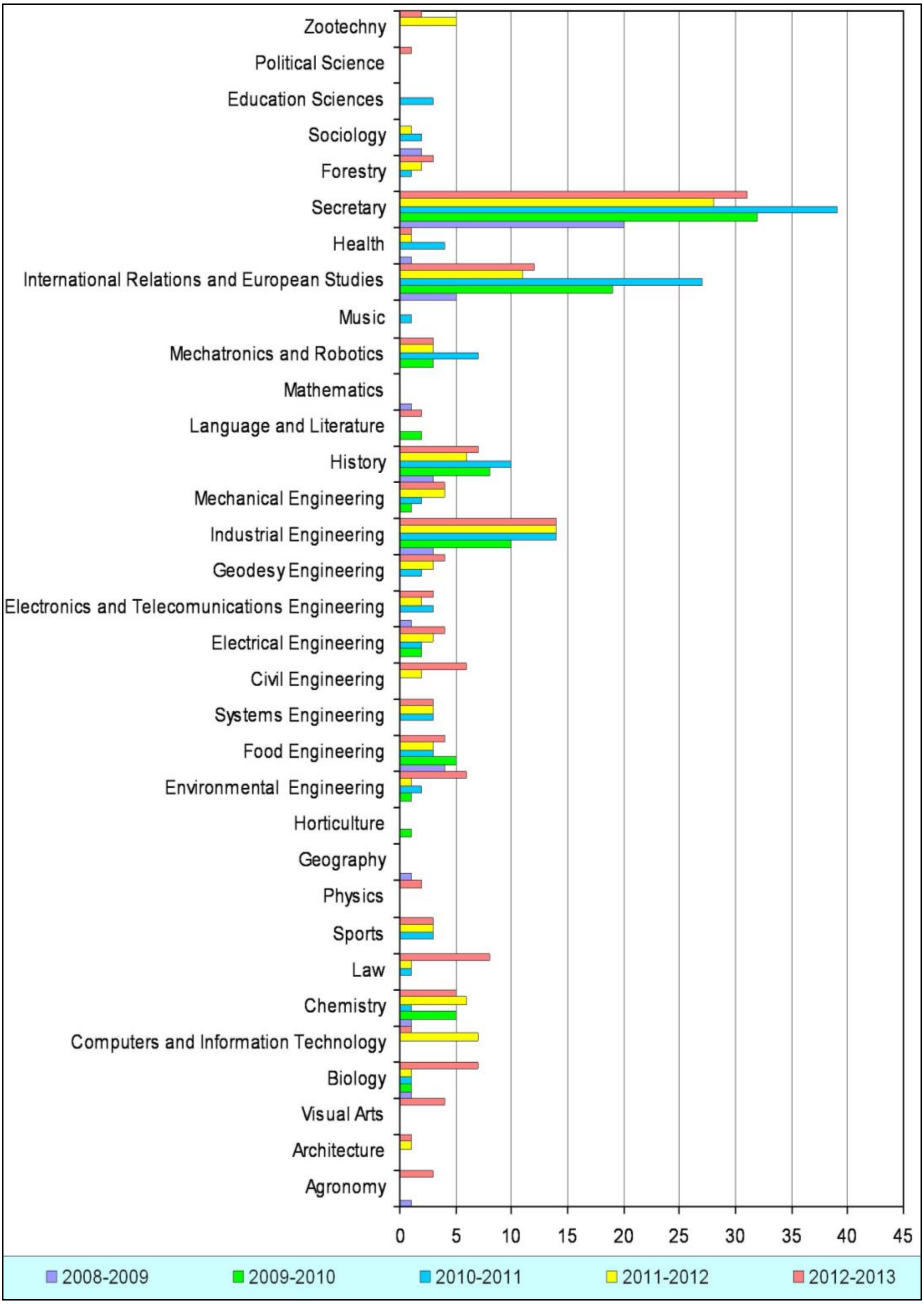


**Figure 1**. Departments from which teachers participated in professional training mobilities during 2008-2013
(Data source: Department of International Relations, University of Oradea)

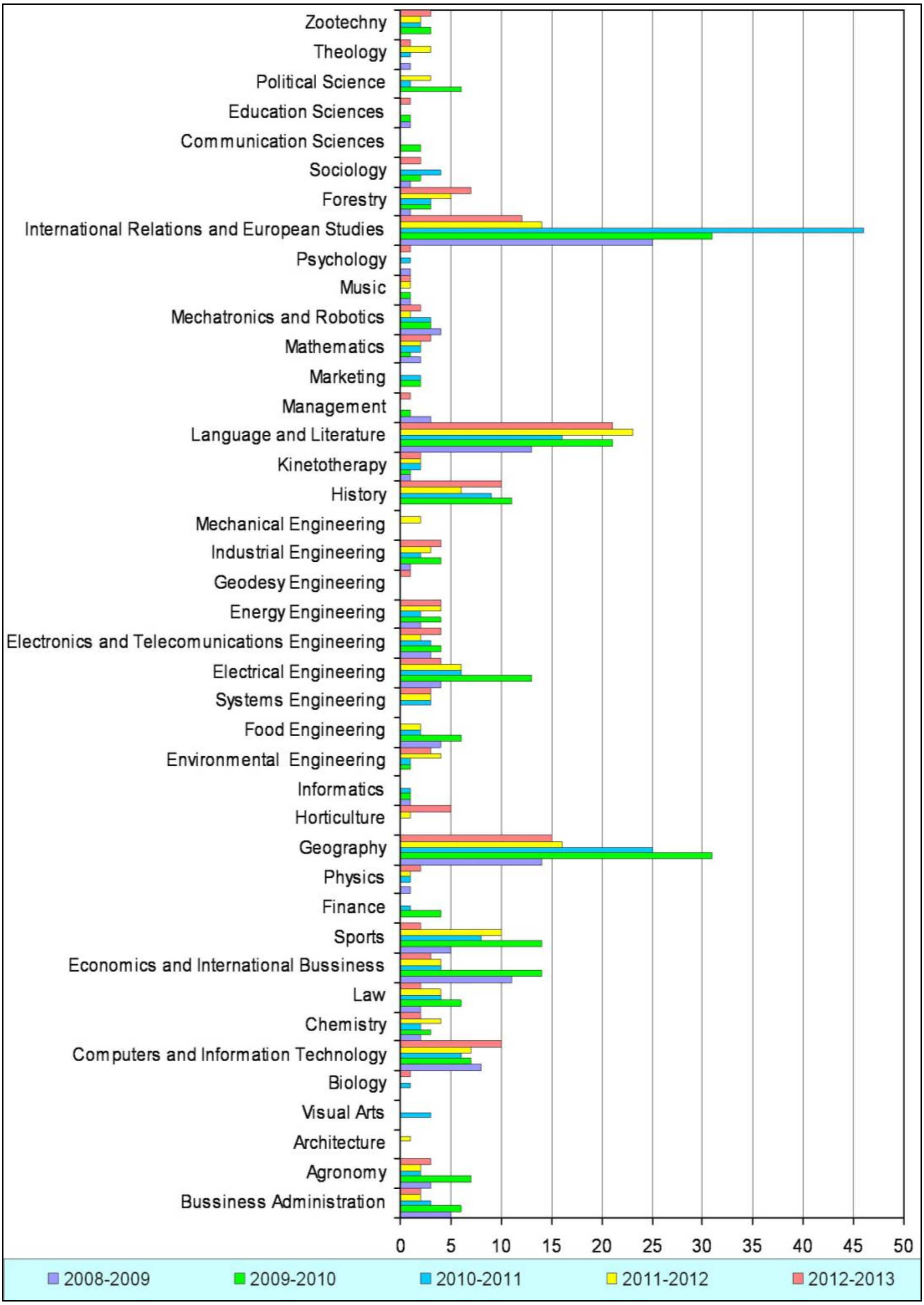


**Figure 2**. Departments from which teachers participated in mobilities focused on teaching methods during 2008-2013
(Data source: Department of International Relations, University of Oradea)

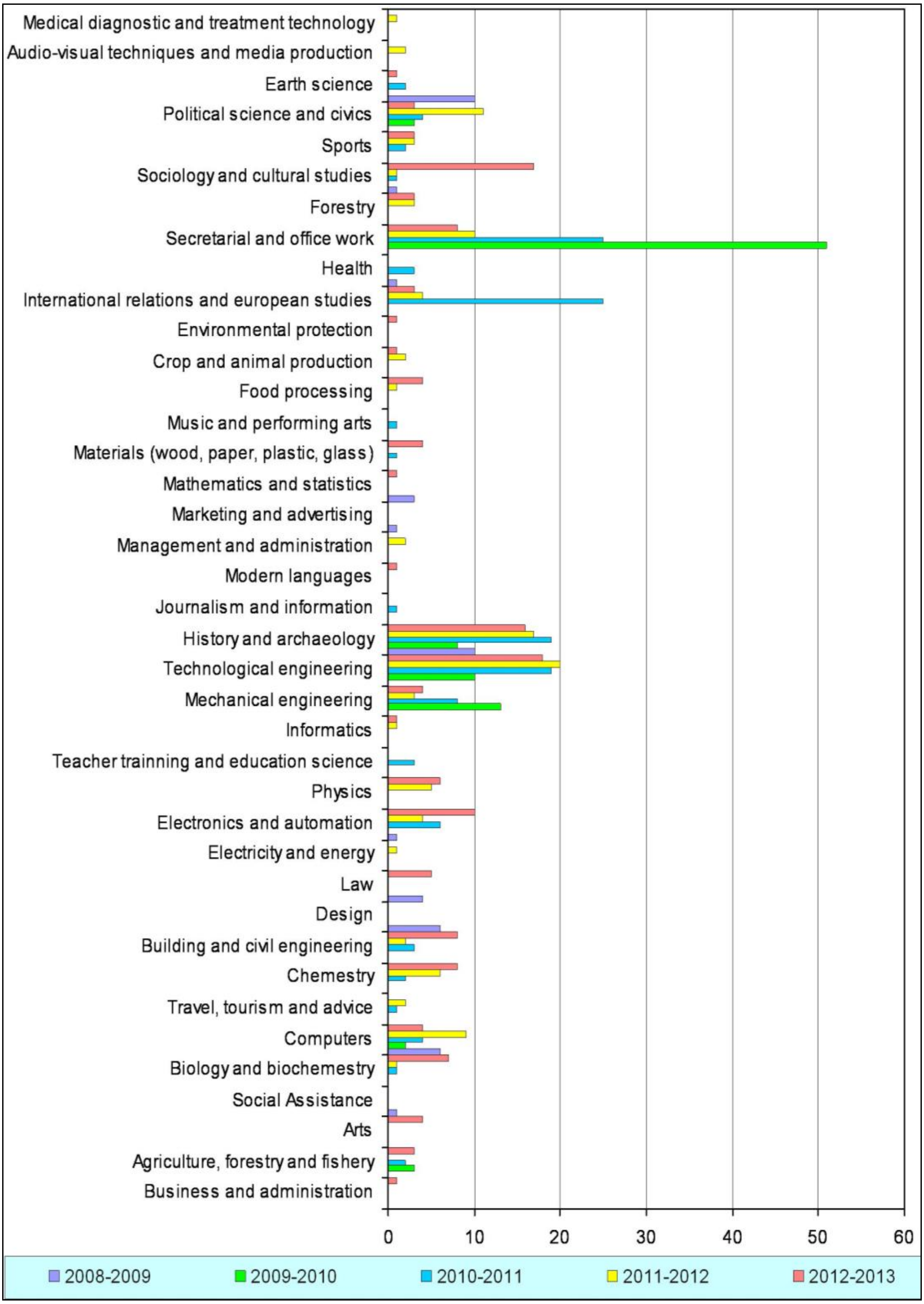


**Figure 3**. Fields in which the teachers from the University of Oradea were trained within the European projects during 2008-2013
(Data source: Department of International Relations, University of Oradea)

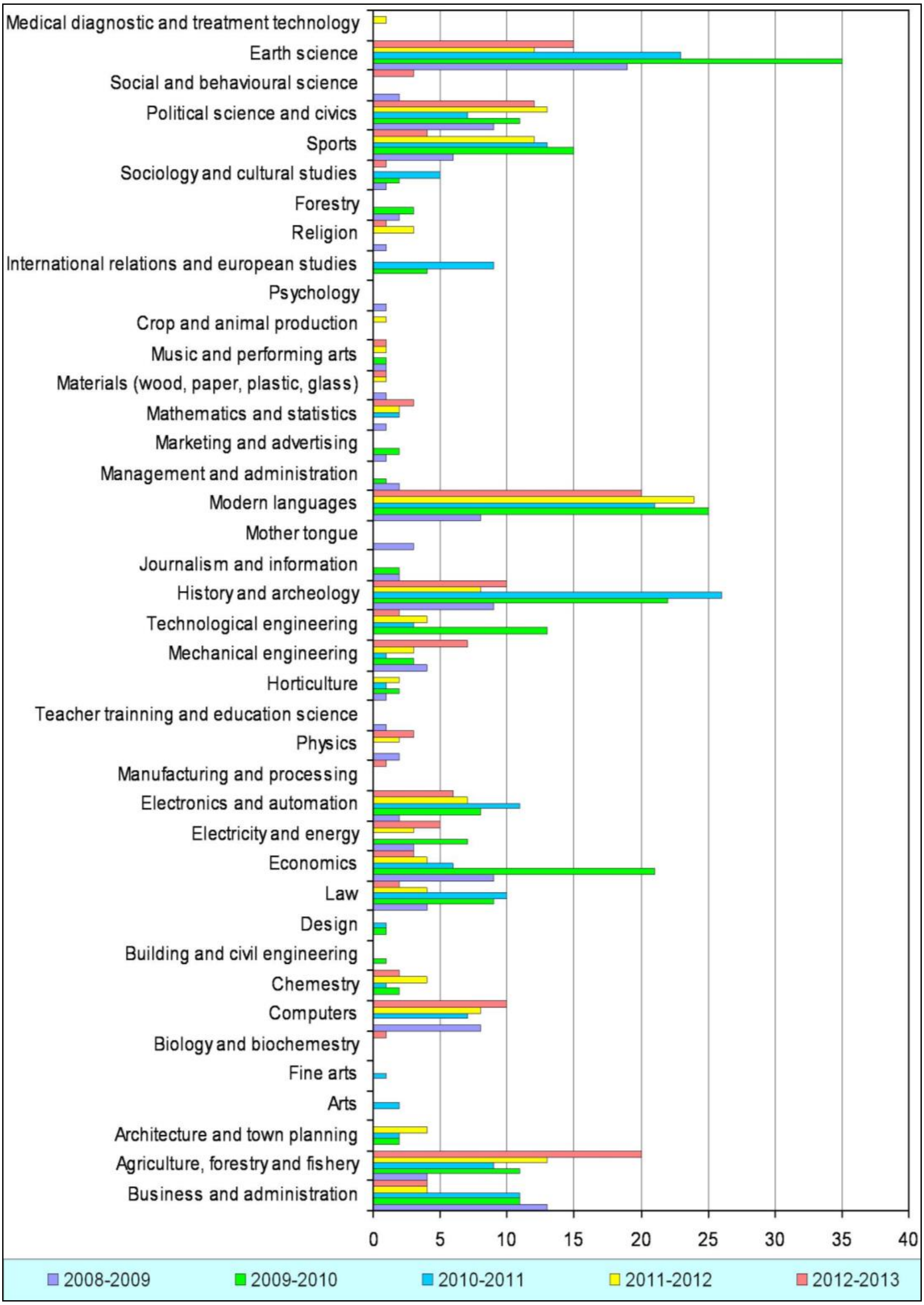


**Figure 4**. Fields of activity of the teachers
from the universities of Europe during 2008-2013
(Data source: Department of International Relations, University of Oradea)

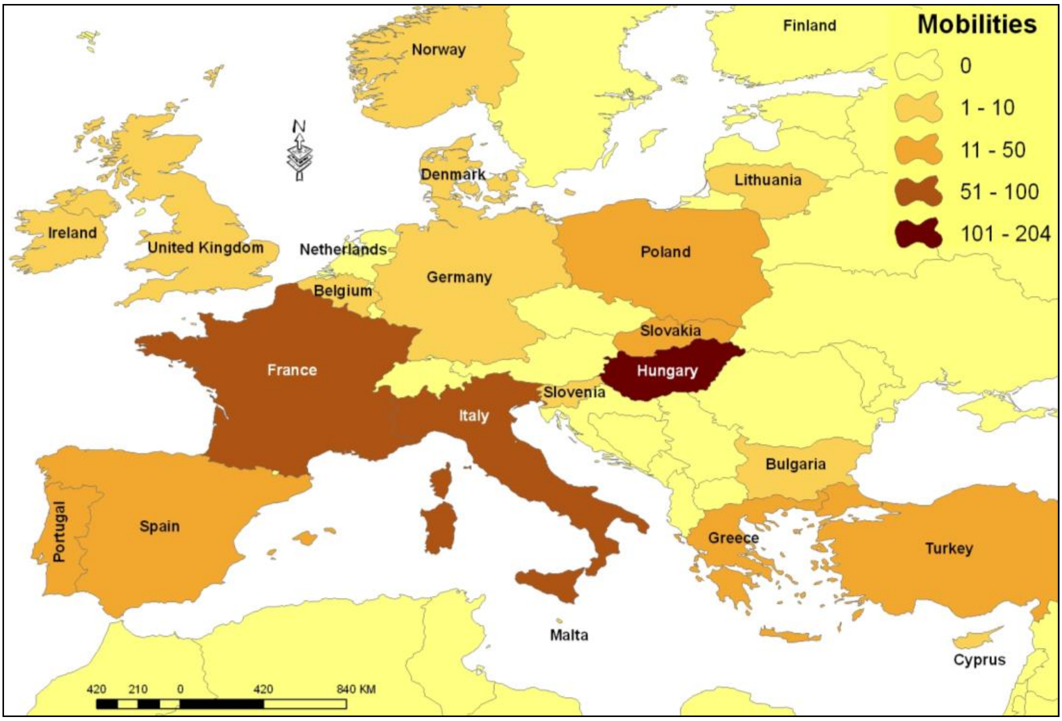


**Figure 5**. The European countries that hosted professional trainings mobilities for teachers during 2008-2013

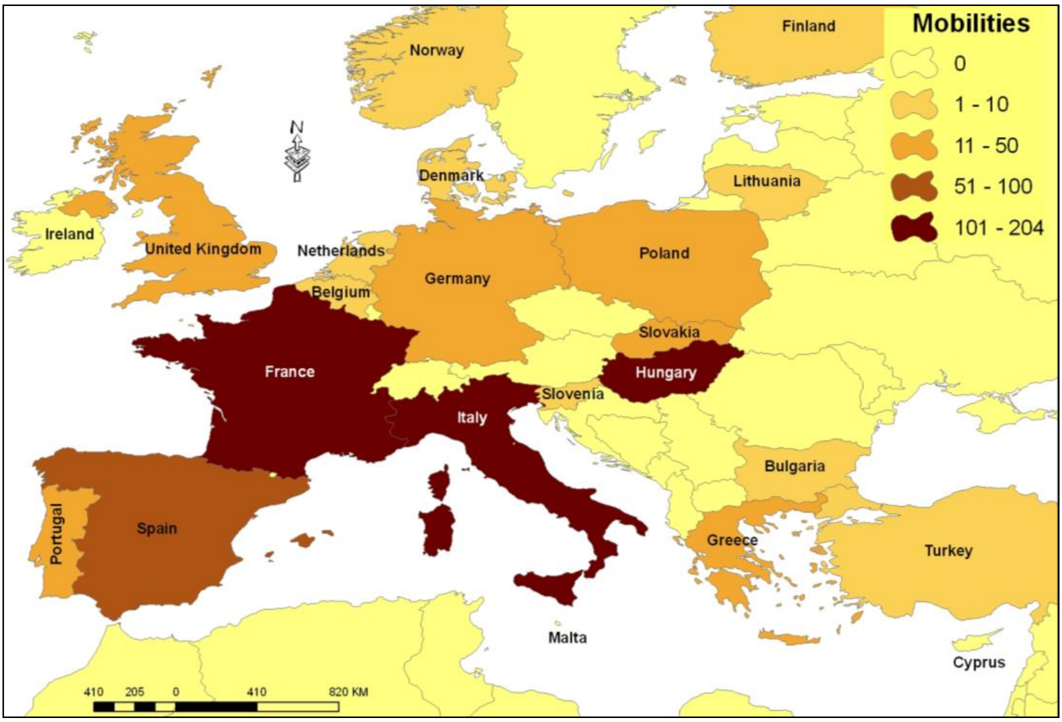


**Figure 6**. The European countries that hosted teaching methods mobilities for teachers during 2008-2013

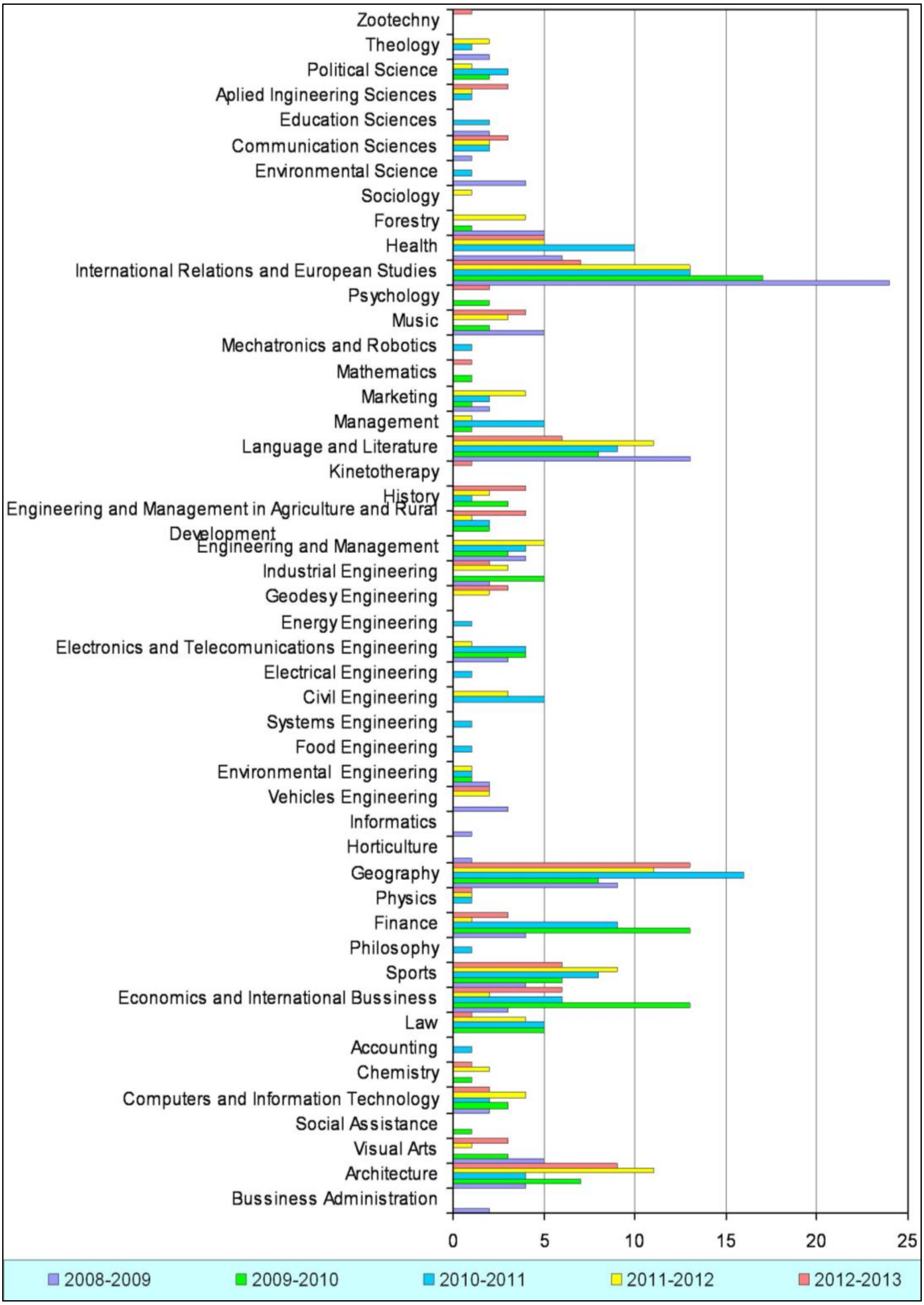


**Figure 7**. The study fields of the students from the University of Oradea who participated in study mobilities in universities from Europe during 2008-2013
(Data source: Department of International Relations, University of Oradea)

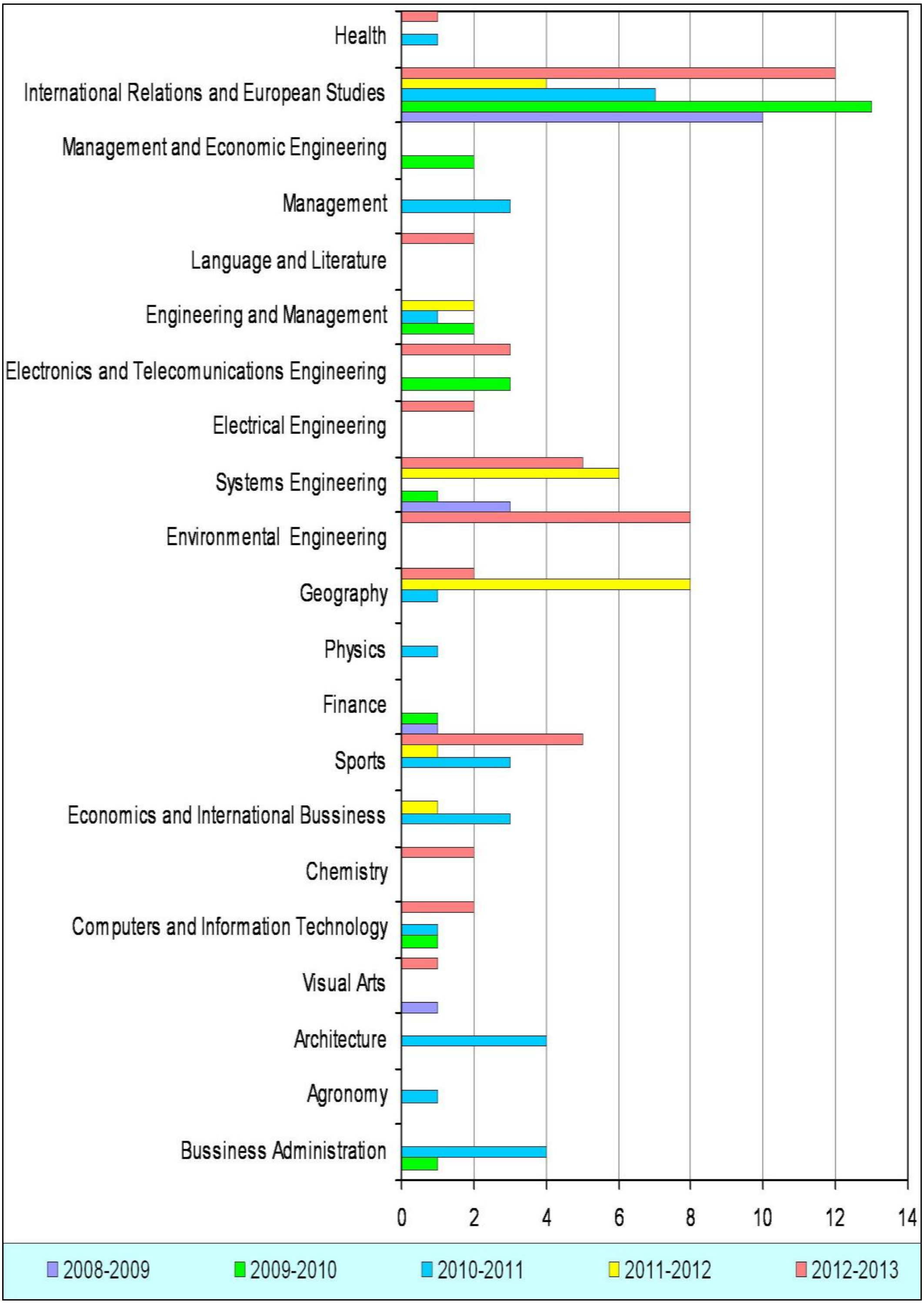


**Figure 8**. The study fields of the students from the University of Oradea who participated in placement mobilities in universities from Europe during 2008-2013
(Data source: Department of International Relations, University of Oradea)

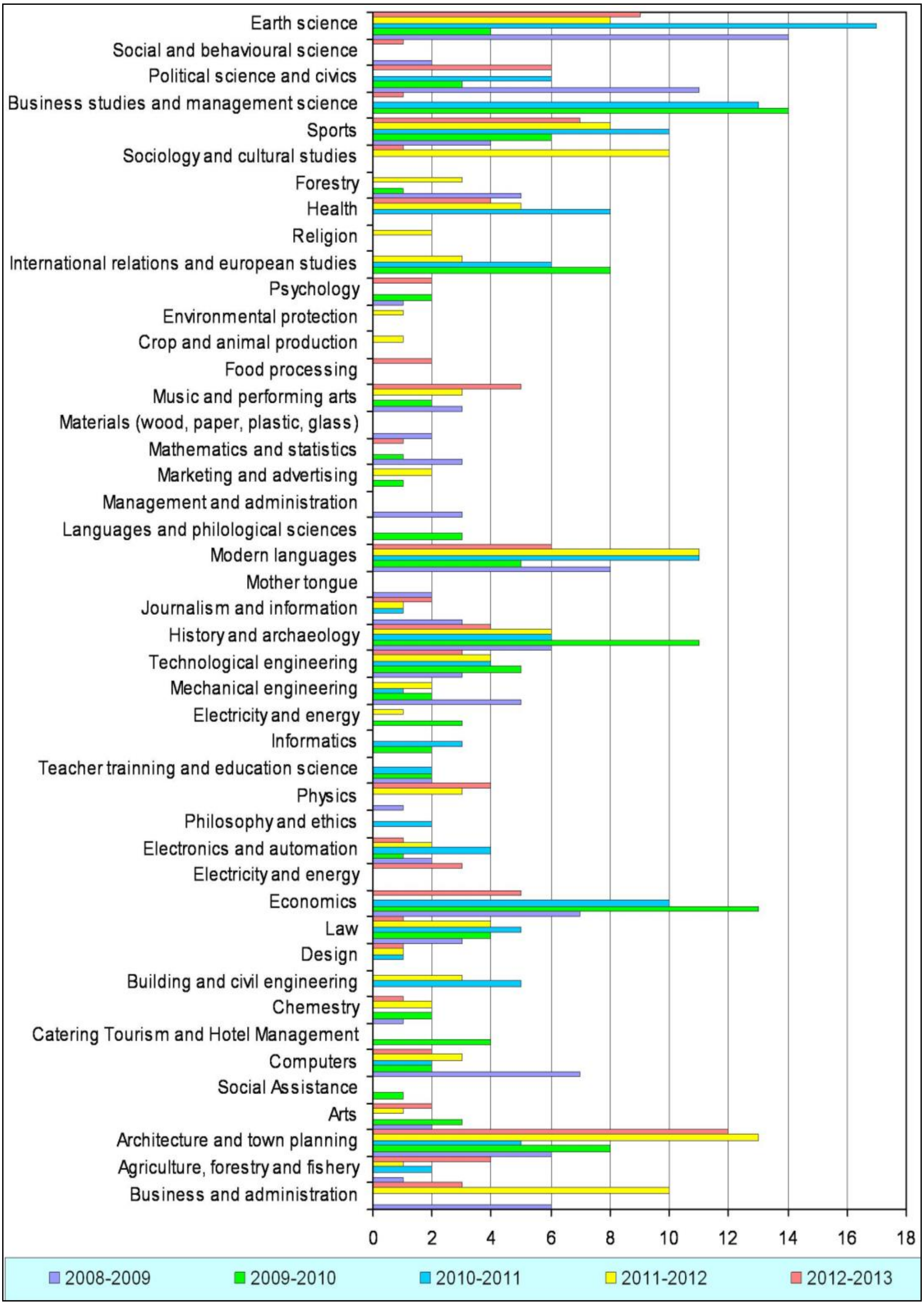


**Figure 9**. Fields in which were trained the students participating in study mobilities in different European universities during 2008-2013
(Data source: Department of International Relations, University of Oradea)

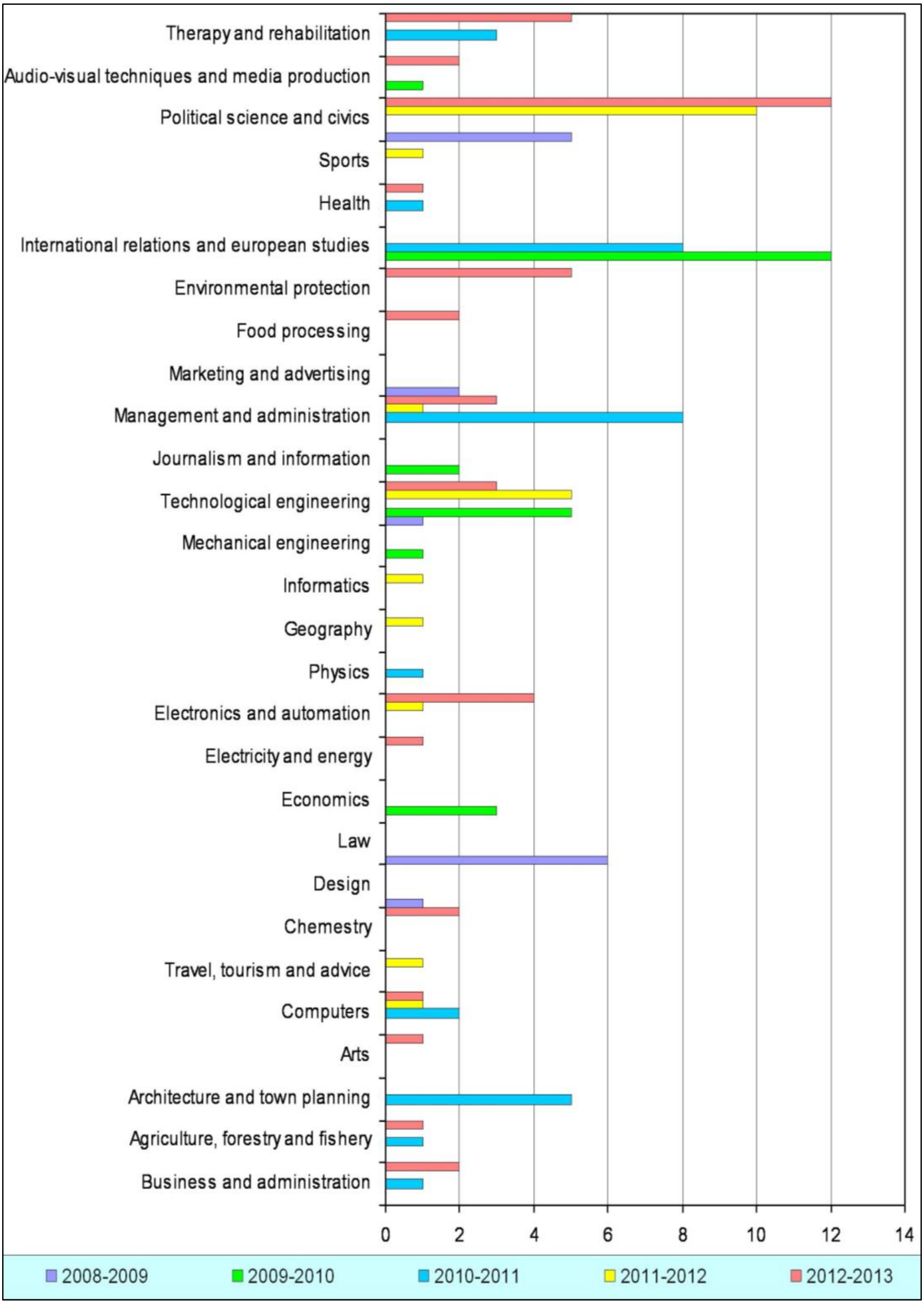


**Figure 10**. Fields in which were trained the students participating in placement mobilities in different European universities during 2008-2013
(Data source: Department of International Relations, University of Oradea)

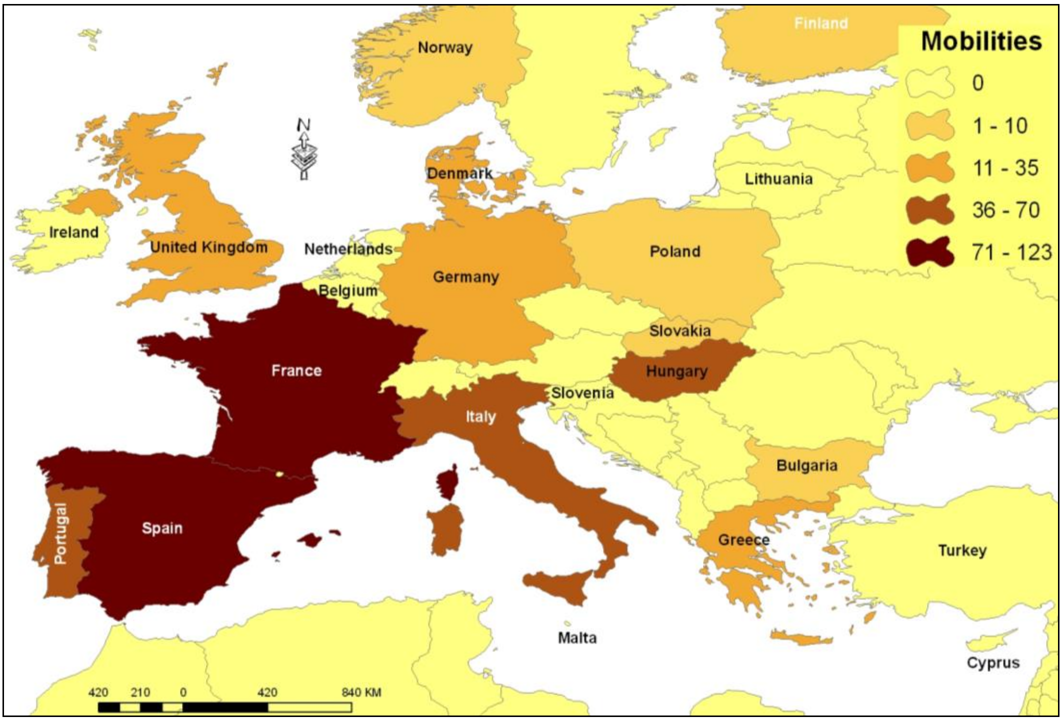


**Figure 11**. European countries in which study mobilities were organized during 2008-2013

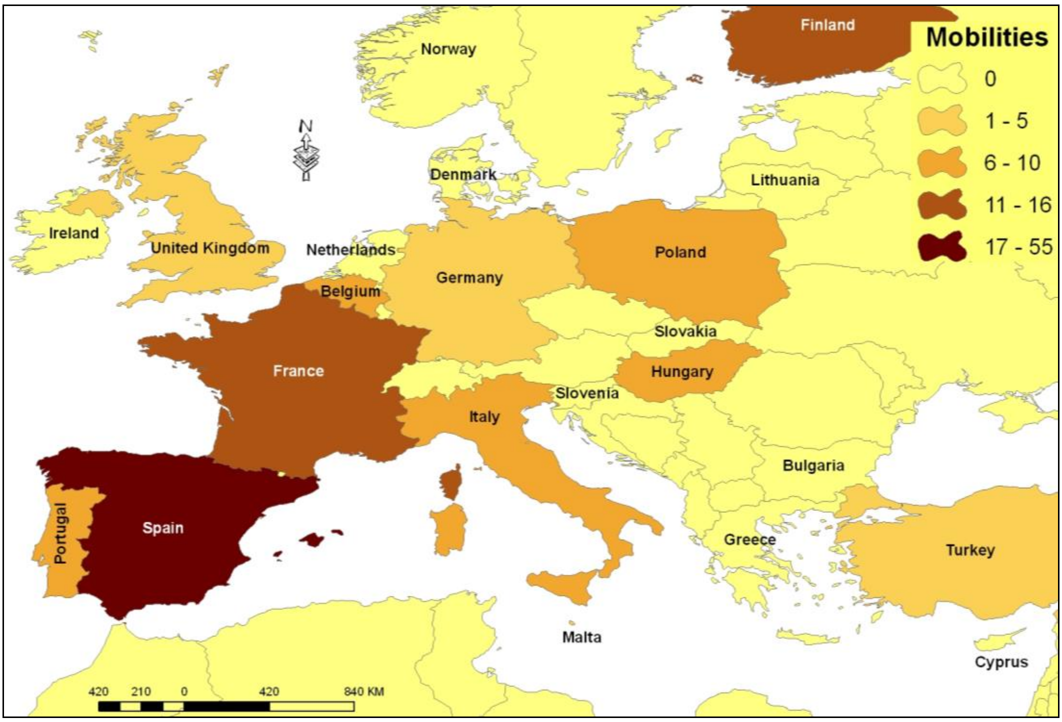


**Figure 12**. European countries in which placement mobilities were organized during 2008-2013

## CONCLUSIONS

The University of Oradea is one of the most prestigious educational institutions in Romania, having as its main objective the training of specialists in all socio-economic, cultural and political fields. The training of specialists is also done at an international level, the university participating in European programs and cooperative partnerships with universities in Europe, thus contributing to the development of the horizon of knowledge and experience of both teachers and students. The development of various international partnerships is carried out through the European program ERASMUS that aims at training professors and students in higher education institutions and enterprises (ST), through specialized training mobilities in higher education institutions (TA), through study mobilities for students (SMS), placement mobilities for students (SMP), etc.

During 2008-2013, Oradea's university professors and students participated in developing these mobilities both in training and in related fields in various European universities. Such mobility gave them chance to discover Europe, to understand the host region with all its peculiarities and to understand the higher education system from Romania and from other European countries. During the above mentioned period, a special interest for participation in international mobility was showed by the professors and students from the fields: International Relations and European Studies, Geography, Language and Literature, Industrial Engineering, Physical Education and Sports, History, Economics and International Business.

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